OMX Customer Service Guide

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Introduction To OMX Customer Service

This book describes the Customer Service area of OMX. Customer service representatives who are new to OMX can use this guide to learn the basics. More experienced customer service representatives can use this guide as a reference to look up infrequently-performed tasks.

The Customer Service Dashboard

The customer service dashboard is the starting point for most customer service tasks. To display the customer service dashboard, click the **Customer Service** tab.
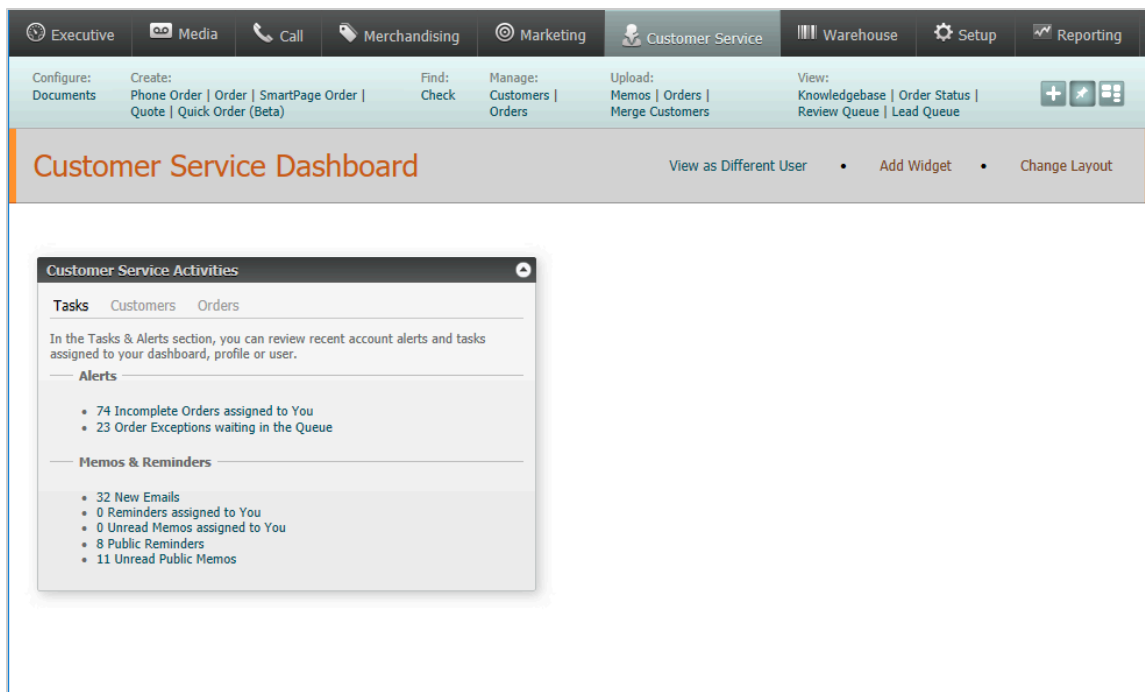
Menu Bar Icons

The menu bar includes three icons to help you navigate and customize your view.
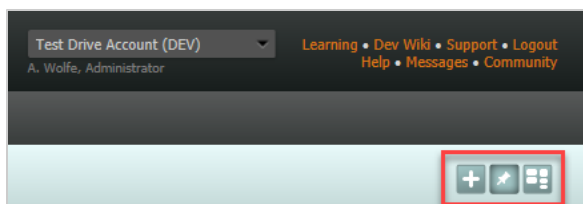
- To return to the customer service dashboard from any other page, click the **Customer Service** tab, then click the ⊞ icon.

- To see more menu choices, click the Additional Menu Items ➕ icon. Click again in the same spot (it becomes a minus sign when expanded) to hide the extra choices.

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- To automatically hide the menu bar, click the Auto-Hide Submenu ⚲ icon.

The Customer Service Activities Window

The Customer Service Activities widget provides access to OMX functionality often used by customer service representatives and other customer service personnel.
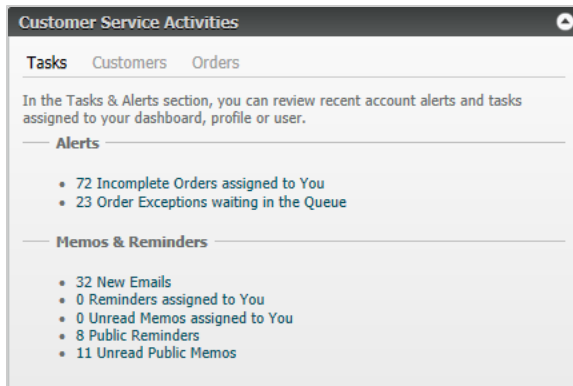
Use the Customer Service Activities widget to:

- view your assigned alerts, memos, and reminders

- return a list of customers based on your search criteria

- return a list of orders based on your search criteria

> ⓘ **Note:** To view the Customer Service Activities widget, you need to have Customer Service Activities widget permission enabled. For customer service representatives, this permission is enabled by default.

Customizing the Customer Service Dashboard

Customer service representatives can customize the customer service dashboard by adding widgets. Widgets are windows that present a summarized view of information that you may need to check regularly, such as cancellations, expected returns, and top items ordered.

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Note: The ability to add widgets to the dashboard is controlled by the User Profile > Customer Service > Customer Service: Customer Service Activities widget permission. This permission is enabled by default for customer service representatives.

To add a widget to your dashboard:

1. In the header bar, click **Add Widget**.
2. In the Add Widgets window, click the **Add to Dashboard** button for the applicable widget.

To stop displaying a widget on your dashboard, click the **x** in the upper right corner of the widget and click **OK** to confirm.

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Finding a Customer in OMX

There are several ways to find a customer in OMX. These include:

- using the command line
- using the Customer Service tab
- using the Customer Service Activities widget

Using the Command Line To Find a Customer

The command line lets you search using shortcuts. You can type the shortcut letter, upper or lower case, directly into the command line. You can also use the Select Action list to insert the shortcut automatically.

If you search using the customer number, OMX takes you directly to that customer's page. If you do not know the customer number, you can search using part or all of the customer's name. OMX displays the Customer Search list. You can scan the list to find the specific customer you are looking for.

Example: Search for a Customer By Name

In this example, we want to find a customer with the last name Doe. We cannot remember the shortcut for customer, so in the Select Action box, we select **Go to Customer detail or search for Customer by Name**.
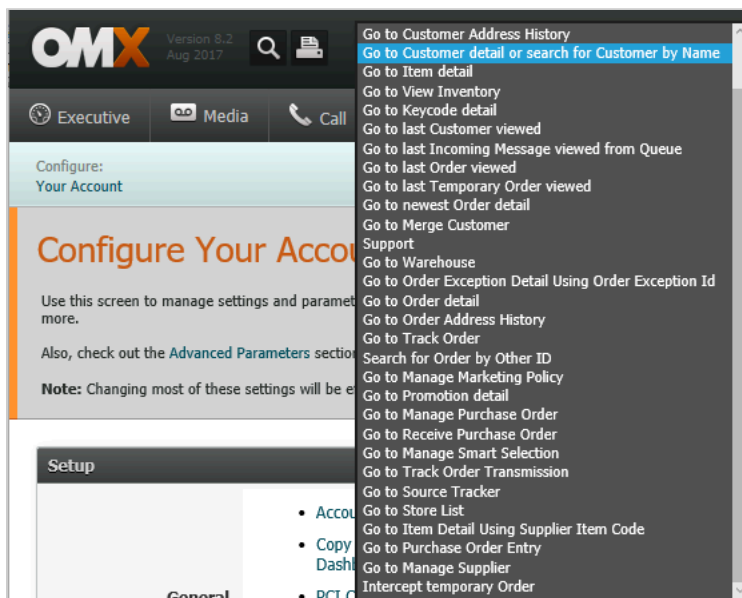
OMX inserts the shortcut letter **c** and a space into the command line. After the c, we enter **doe**.

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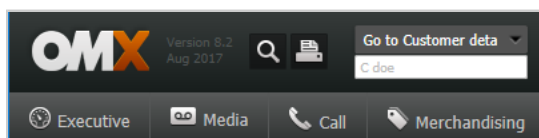
OMX displays a list of search results, with the most relevant results at the top. The search results also show names that are similar to the name Doe.

The customer we want is at the top of the list, so we click the customer number link in the first row to display that customer's Manage Customer page.

Example: Search for a Customer By Number

In this example, we know the customer number, and remember that the shortcut letter is c. On the command line, we type the letter **c**, followed by a **space**, then the customer number **10001**.

OMX displays the Manage Customer page for that customer.

Using the Customer Service Tab To Find a Customer

Click the **Customer Service** tab, then click Manage: **Customers**.

OMX displays the Customer and Order Search window.

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You can search for the customer using their first name, last name, customer number, or any other field included on this page.

Using the Customer Service Activities Widget To Find a Customer

With the Customer Service tab selected, click the Show Dashboard icon ⊞ on the far right end of the menu bar.

On the Customer Service Activities widget, click the **Customers** tab.

Using this tool, you can search by typing your known information into any of the fields and clicking **Search**.

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If the Customer Service Activities widget does not appear on the Customer Service dashboard, you can add it as follows:

To add the Customer Service Activities Widget:

1. On the Setup tab, in the General section, click **User Profiles**.
2. On the Profile Management page, click **Customer Service**.
3. On the Manage User Profile page, scroll down to the Customer Service lines, and check the box for **Customer Service Activities**.

   OMX adds the Customer Service Activities widget to the dashboard.

Order Search

This chapter describes how to search for a customer order in OMX.

The Customer Order and Search Window

You perform all searches from the Customer Order and Search window. To display this window, on the Customer Service tab, click Manage: **Orders**.

This window lets you search for an order in the following ways:

- **Billing Details** – search using information from a customer's primary address.
- **Shipping Details** – search using information from a customer's shipping address.
- **Reference** – search using a unique identifier, such as customer number, order number, or alternative ID numbers.
- **Options** – search by sales division.
- **Custom Fields** – search using additional information gathered from your customers.
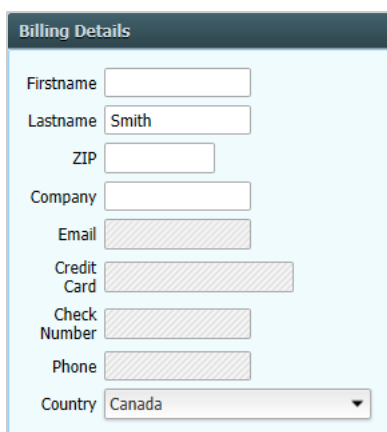
Search Tips

This topic contains general advice on effective search techniques.

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Field Combinations

On the Customer Order and Search window, OMX indicates the fields that can and cannot be combined in a search. After you enter a value in one of the fields, such as Lastname, OMX disables the fields that do not apply.

For example, if you enter a name in the Lastname field, OMX disables the Email, Credit Card, Check Number, and Phone fields.

Billing Details

Firstname	
Lastname	Smith
ZIP	
Company	
Email	
Credit Card	
Check Number	
Phone	
Country	Canada

Partial and Phonetic Searches

You can perform partial searches to retrieve a list of possible matches.

For example, enter **R** in the Firstname field, **B** in the Lastname field, and select **Canada** from the Country list. OMX returns a list of all Canadian customers with the initials RB, with their customer numbers. You can scan the returned list for the specific customer, and click their Customer Number. OMX opens the customer's Manage Customer screen, which contains a list of the customer's orders.

OMX also performs phonetic searches. For example, enter **Rob** in the Lastname field and select **USA** from the Country list. OMX returns a list of American customers with last names such as Robin and Robertson.

Search Results

Two factors to consider when searching are speed and accuracy.

The more specific a search is, the more accurate are the results. So completing as many fields as possible yields the most accurate results. However, keep in mind that search time may be longer if you enter more fields, for a more complex search. A complex search can either timeout or slow down the system.

After you enter your search criteria and click **Continue**, OMX displays the search results. The results indicate the percentage of relevance for each result. For example, if you search for "John Doe", a match of John Doe would yield a relevance percentage of 100%. OMX calculates relevance based on the type of match a given field has with the search term. Search results with the highest relevance are at the top of the list. Only the first 100 matches are listed.

Searching for a Customer Order

OMX allows you to search based on many different fields.

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To search for a customer order:

1. On the Customer Service tab, click Manage: **Orders**.

2. On the Customer and Order Search window, fill in all fields for which you have information. The following fields are provided:

- **Billing Details and Shipping Details**
  - **Firstname** – Enter a maximum of 30 characters.
  - **Lastname** – Enter a maximum of 30 characters.
  - **ZIP** – Enter a maximum of nine characters.
  - **Company** – Enter a maximum of 30 characters.
  - **Email** – Returns any email address starting with the specified letters. You do not need to specify an email format (name@email.com). Enter a minimum of three characters.
  - **Credit Card** – Specify a minimum of 12 characters and a maximum of 20 characters. This applies to Billing Details only.
  - **Check Number** – Enter a maximum of 16 characters. This applies to Billing Details only.
  - **Phone** – Validated only when a country is specified. You can enter several variations of the telephone number, but a minimum of 10 characters is required. For example, 905-884-1234, (905) 884-1234, and 9058841234 are all acceptable formats.
  - **Country** – Must be combined with another valid value. Available values are taken from the selections made in the Customer Base module.
  - **Tracking Number** – Enables you to search based on tracking information entered in a previous order that was shipped. Applies to Shipping Details only.

- **References**
  - **Customer Number** – Enter a maximum of 9 characters. Partial searches and wildcard characters (*) are allowed, but for best results, use the complete customer number.
  - **Order Number** – Enter a maximum of 9 characters. You must enter the entire order number (partial searches are not allowed).
  - **Membership ID** – Enter a maximum of 9 characters. You must enter the entire membership ID number (partial searches are not allowed).
  - **Alt ID** – The alternate ID is a third-party's reference code or number that helps identify an order. Usually, this is the order number generated within the external e-commerce system (Yahoo! stores, for example). Enter a maximum of 35 characters. OMX displays an additional column in the search results showing the matching Alt ID value.
  - **Alt ID 2** – Each order can contain up to two alternate IDs. Enter up to 200 characters. OMX displays an additional column in the search results showing the matching Alt ID value.

  > ⓘ **Note:** The Alt ID and Alt ID 2 values are available for editing only if the AltIDEditable company parameter is set to True.

  - **Lead Number** – Enter a maximum of 9 characters. You must enter the entire lead number (partial searches are not allowed).
  - **Expected Return #** – Enter a maximum of 9 characters. You must enter the entire expected return number (partial searches are not allowed).
  - **Alt. RMA** – Enter a maximum of 9 characters for the Return Merchandise Authorization.

- **Options**
  - **Include** – Check this box if OMX should include duplicate customers in the search results.
  - **Division** – Select a division from the list.

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- **Custom Fields**
    - **Custom Field** – Select a field from the list of custom fields that have been set up in your OMX system.
    - **Field Value** – Searches for the text entered in the selected customer field. OMX displays an additional column in the search results showing the matching custom field value. You can enter over 100 characters.

3. After making your selections, click **Continue**.

   If more than one record is retrieved from the search, OMX displays a list from which you can select the required order.

Customer Search							
Customer Num...	Last Contact Date	Last Order Date	Name, Address	Phone, Email	Flags	Customer's Division	Relevance
12005	3/6/2017	3/6/2017	Bob M Smith 123 Main Street Apt 15d Anytown, NY 11375 USA	+1 (212) 8773920 BOB@SOMEWHERE.COM		(no division), Jason	100%
11424	5/24/2005	5/24/2005	Mr Bob Smith 359 N MAIN ST GLASSBORO, NJ 08028 USA	robert7699@aol.com		(no division), dh1m0401	100%
11196			Smith, Inc Mr Bob Smith 2420 CONCORD AVE SANTA CLARA, UT 84765 USA				100%
12262			Smithco Mr Bob Smith 815 E Las Olas Blvd Fort Lauderdale, FL 33301 USA	+1 (954) 9202892			100%
11396			Abc.com Mr Bob Smith 300 South Duncan Suite 163 Clearwater, FL 33755 USA	+1 (727) 5690781 rsmith@tampabay.rr.com			100%
11612	8/31/2005	8/31/2005	Mr B Smith 123 Main Street Royal Oak, MI 48073 USA	+1 (888) 5551212 info@liltots.com		TestSolidCactus	80%

Back

The Relevance column displays the percentage of relevance of the customer based on your search criteria. The greater the match, the higher the percentage.

4. Click the customer number hyperlink to display all orders in the system for that customer.
5. Click the order number hyperlink of the order that you want to view and manage.

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Order History

This chapter describes all of the options in OMX for viewing order history. Available options include:

- viewing order history for a customer
- viewing order selection history for a customer
- viewing notification history for an order
- using request types to view order history

Viewing Order History for a Customer

The Order History window lets you view a complete list of orders for a customer, including order numbers, order dates, and order status.

To view the order history for a customer:

1. On the Customer Service tab, click Manage: **Customers**.

2. In the Customer Number field of the References window, enter the number of the customer whose order history you want to view.

   ✔ **Tip:** If you do not know the customer number, enter search criteria to find the customer.

3. Click **Continue**. A page similar to the following appears:

   ✔ **Tip:** You can also access this page by entering the following command line:

   `c customer number`

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There are three views available for this page (use the **switch to** list in the title bar to change views):

- **Standard View** (default) – displays the Order Amount, Paid Amount, Status and Date for each order placed by this customer.

- **Payment Balance View** – displays additional detail, including Order Date, Keyed Date, Latest Ship Date, Last Confirmed Payment Date, and Payment Type.

- **Standard (Expanded) View** – expands to include details for each item in the order, including Item Code, Description, Qty, Total, Status, and Date.

The Standard View table displays the following information about each order placed by this customer:

- **Channel** – Displays an icon that denotes the method (or channel) used to place the order.
- **Order Number** (hyperlink) – Displays the order number. May also display the Alt ID for the order, if entered. Click the order number hyperlink to view and manage that order.
- **Keyed Date** – Displays the date when the order was entered.

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- **Keycode** (hyperlink) – Displays the Manage keycode page for the keycode associated with the order. Click the keycode hyperlink to review and edit the keycode information.

- **Ship-To** – Displays the customer name and shipping location for the order.

- **Order Amount** – Displays the total amount of the order, including taxes and other amounts.

- **Paid Amount** – Displays the total amount that has been paid on the order.

- **Status** – Displays the status of the order, and the date when the status was applied to the order.

Selecting the Standard (Expanded) View from the list at the top of the page displays the item code, description, and quantity ordered. It also displays the total cost, status of the order line, and the date when the item was ordered.

Viewing Order Selection History for a Customer

OMX keeps a record of order selection for each customer. This record is a history of Campaigns that have been run against the customer's email address.

To view the order selection history for a customer:

1. On the Manage Customer page, click **Stats**.

2. On the View Statistics page, scroll down until you see the Selection History window.

Viewing Notification History for an Order

You can view the email notifications that have been sent to customers on a per-order basis, and the dates that these notifications were sent. This enables you to keep track of the effectiveness of your notification texts. It also enables customer service representatives to better understand each customer's contact history for each order. The notification history is available from any order memo page.

To display the notification history for an order:

1. Select the order that you want to manage.

> ✔ **Tip:** On the command line, enter
>
> **o** `order number`

2. On the Manage Order page, click the memo icon in the order SmartLabel.

3. On the Existing Entries window, click **Notifications**.

The Notifications window appears.

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The Notifications window displays all notifications associated with this order. The following columns are included:

- **Order Number** (hyperlink) – The order number associated with the notification.
- **Type** – The type of notification issued.
- **Created** – The date when OMX created the notification.
- **Sent** – The date when OMX sent the notification.

4. Click an order number hyperlink to view and manage the selected order.

Using Request Types to View Order History

Customer service representatives can use request types to view order history.

For detailed information on these and all other available APIs, refer to the OrderMotion Developer Wiki at developers.ordermotion.com.

Request Type Category	Request Type	Description
Customer Request Type	CustomerHistoryRequest (CUHR200)	This request type lists all the orders that a customer has placed.
Order Request Type	CancellationHistoryRequest (CHR100)	This request type lists all the cancellations that have occurred between two dates.

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Order Status and Exceptions

This chapter explains all of the options available to you for checking order status in OMX. Options include:

- viewing order status reasons
- managing order exceptions (outside order queue)

Viewing Order Status Reasons

You can view order status reasons to learn why a customer's order was placed on hold.

Each order status reason consists of two parts: a description of the reason, and a public reason. The public reason is a statement to use when customers ask why their order is on hold.

> **(i) Note:** You cannot remove an order status reason after it has been created, but you can rename it when updating. See Updating a Secondary Status Reason.

On Hold List Report

The On Hold List report shows you all of the orders with an On Hold status, grouped by status reason.

Viewing the List of Secondary Status Reasons

You can view the list of order status reasons that currently exist. You can set up additional reason codes that can be applied when an order is in a certain status.

To view the list of order status reasons:

1. From the Setup dashboard, in the Customer Service section, click **Secondary Status Reasons**.

   The Secondary Status Reasons window appears.

Reason ID	Reason Code	Line Status	Reason	Public Reason	Is Restricted in UI	Active
1	1	on hold	Insufficient funds - cont ...	We're sorry, but you did not enclose sufficient payment with your order. We have sent you an invoice ...	❌	✅
2	2	on hold	Fraud Alert	Your order is currently on hold pending further review.	❌	✅
3	3	on hold	Back Order	This item is very popular with our clients and is currently on back order. We will have a new shipme ...	❌	✅
4	4	on hold	Person not sure of item	Person not sure of item	❌	✅
5	5	on hold	Preordered 6 mos.	Preordered 6 mos.	❌	✅
6	6	on hold	CyberSource Review - addr ...	Address does not match	❌	✅
7	7	on hold	CyberSource Review - bill ...	billing mismatch	❌	✅
8	8	on hold	CyberSource Review - cvv ...	cvv mismatch	❌	✅
9	9	on hold	CyberSource Review - nam ...	name mismatch	❌	✅

   This window includes the following columns:

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- **Reason ID** (hyperlink) – The unique numeric identifier of the order status reason.
- **Reason Code** – The unique numeric identifier of the order status reason.
- **Line Status** – Indicates if the order is on hold.
- **Reason** – Explains the real reason for the hold.
- **Public Reason** – Tells you what to say to customers if they call and ask why their order is on hold.

2. You can perform the following operations:

- Click the order status reason ID hyperlink to view more information about and update the selected order status reason.
- Click **Add** to add an order status reason.
- Click **Show Deleted** to view deleted Secondary Status reasons.

Adding a Secondary Status Reason

You can set up additional reason codes that can be applied when an order is in a certain status.

To add a secondary status reason:

1. From the Setup dashboard, in the Customer Service section, click **Secondary Status Reasons**.
2. On the Secondary Status Reasons window, click **Add**.

3. On the New Secondary Status Reason window:

- Ensure that the Active box is checked.
- In the Reason Code field, enter a short-form code for the reason (up to 10 alphanumeric characters).
- Use the Line Status list to select the appropriate status.
- In the Reason field, enter a description of the order status reason that you are creating (maximum 60 characters).
- In the Public Reason text box, enter an explanation that you can provide to the customer if they want to know the status of their order.

4. Click **Add**. OMX displays a message indicating whether the order status reason was added successfully.

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Updating a Secondary Status Reason

You can update a secondary status reason when you want to edit the line status, reason name, or public reason.

> **ⓘ Note:** Updating the order status reason affects the transaction history. The order status reason retains its ID.

To update a secondary status reason:

1. From the Setup dashboard, in the Customer Service section, click **Secondary Status Reasons**.

2. On the Secondary Status Reasons window, click the ID hyperlink of the secondary status reason that you want to update.

3. On the Edit Secondary Status Reason window:
   - Ensure that the Active box is checked.
   - In the Reason Code field, enter a short-form code for the reason (up to 10 alphanumeric characters).
   - Use the Line Status list to select the appropriate status.
   - In the Reason field, update the description of the order status reason (maximum 60 characters).
   - In the Public Reason text box, update the explanation to provide to the customer if they want to know the status of their order.

4. Click **Update**. OMX displays a message indicating whether the order status reason was updated successfully.

Managing Order Exceptions (Outside Order Queue)

The Order Exception Manager (formerly the Outside Orders Queue or E-commerce Queue) user interface enables you to update and process outside orders. You can keep track of the original data, rectify multiple

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errors one at a time, save changes, and resubmit resolved orders so they may be processed through OMX.

Use the Order Exception Manager to update and process exceptions. These exceptions become orders when they are fixed. You can manage order exceptions using a window, or edit the data in XML format.

Orders can end up in the Order Exceptions List for many reasons. For example:

- This Standing Order cannot be created because continuity membership is inactive.
- The provided item code does not exist or is not available in this campaign.
- The provided Shipping Method does not exist or is not available in this keycode.
- The provided shipping method cannot be mapped to a shipper defined in OMX.
- The provided order ID has already been used for this store.
- The provided value for Credit Card Number is not valid (CARDSTORAGEEXPIRED) - unknown Card Type.
- The provided keycode does not exist.

Columns and Sorting Options

By default, the most recent errors appear at the top of the list. To sort by a different column, click the column header. To do an inverse sort on a column, click the column header a second time. You can sort by:

- Order Exception ID
- Date
- Error
- IP address
- Store Name
- Order ID
- Shipping Method
- Status

Viewing the Order Exception Manager

Use the Order Exception Manager to find orders that you want to correct.

To view the Order Exception Manager:

1. On the Customer Service dashboard, locate the Customer Service Activities window.
2. On the Tasks tab, click the **Order Exceptions waiting in the Queue link**, or select a link in the Order Exceptions Widget (if available).

   The Order Exceptions List displays orders with missing or incomplete information that cannot be completed until corrected. The most recent exceptions are at the top of the list. The following columns are included:

   - **Order Exception ID** – The ID of the incomplete order. The ID is automatically generated.
   - **Date** – The date and time when the order was entered in the queue.
   - **Error** – The error message or messages.
   - **IP** – The IP address of the server that submitted the order.

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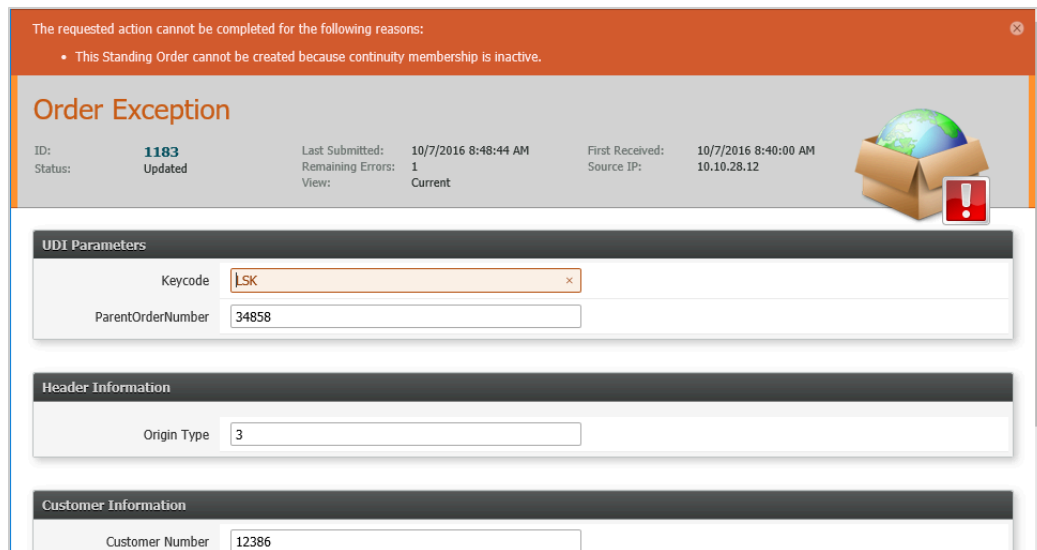
- **Age** (Days) – The number of days the order has been present in the queue.
- **Store Name** – The name of the store that placed the order (if applicable).
- **Shipping Method** – The shipping method used (if available).
- **Status** – Order status. By default, only exceptions with a status of New or Updated are listed. To view exceptions with a status of Queued for Re-Submission, click **Re-Submitted**.

3. Click the Order Exception ID hyperlink for any outside order you want to correct.
4. On the Order Exception window, make your desired changes, then click **Save & Re-Submit**.

Correcting an Order Exception (Outside Order)

You can correct an error in an order that is waiting in the queue.

To correct an outside order:

1. On the Customer Service dashboard, locate the Customer Service Activities widget.
2. On the Tasks tab, click the **Order Exceptions waiting in the Queue link**, or select a link in the Order Exceptions Widget (if available).
3. On the Order Exceptions List, click the Order Exception ID hyperlink for any outside order you want to correct.

4. On the Order Exception window, correct the problems with the order by editing the data in the fields provided.

> ✔ **Tip:** Review the information in the red box at the top of the page to determine where the problem is and how to correct it.

- The Delete button deletes the ID from the list. After an order exception ID is deleted, it is placed in the deleted archives for 90 days. After 90 days, the ID is removed from the system.
- The XML button enables you to view and edit the same data in XML format. This page is locked for security reasons.
- The Back button brings you back to the Order Exception ID list.

5. When you have fixed the issue, click **Save & Re-Submit**.

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The order is re-submitted for processing. If all the necessary information is found, the order is accepted, and a confirmation message appears. If the order cannot be processed, any error messages appear in the red text box.

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Queue Monitoring

This chapter describes the queues in OMX, and describes how to monitor and manage them.

There are two types of queues in OMX:

- message queues
- transmission queues

Message Queues

OMX can receive incoming messages from an outside system. Messages in the incoming messages queue can be emails, memos, XML messages, SMS messages, and so on.

Every incoming message is assigned a unique memo ID to identify it within OMX.

When it arrives, a new message is placed in the generic message queue (if it cannot be assigned to a customer), or in the message queue for the specific customer. See The Generic Message Queue for more information about the generic message queue.

Any email that could not be sent to its email address is bounced back as a new, unread email. Messages are placed in either the generic message queue or in the customer's message queue.

The Incoming Messages Queue

Using an advanced parameter, you can specify the status of messages that you want to appear in the incoming message queue. The parameter is called **IncomingMessageLastStatus**.

To specify message statuses to display in the incoming message queue:

1. On the Setup tab, click **Advanced Parameters**.
2. Scroll down to the Other window.
3. Click **IncomingMessageLastStatus**.

   The Edit Parameter window appears.

Edit Parameter	
IncomingMessageLastStatus	
Number Value	90
Default Value	24
Category	not defined
Description	This parameter allows you to specify the status of messages that you want to be displayed in the incoming message queue. The values are shown below: - 0: Indicates that no messages will be displayed. - 10: Indicates that messages with the status of Unread will be displayed. - 20: Indicates that messages with the status of Read or less will be displayed. - 24: Indicates that messages with the status of Read & Quick Replied or less will be displayed. - 25: Indicates that messages with the status of Read & Replied or less will be displayed. - 26: Indicates that messages with the status of Read & Closed or less will be displayed. - 50: Indicates that messages with the status of Forwarded or less will be displayed. - 90: Indicates that messages with the status of Junk or less will be displayed. The values are hierarchical, meaning that specifying a value will displays all messages with the specified status, plus all messages that have a lower value. For example, specifying a value of 25 means that messages with values 24, 20, and 10 will also be displayed.

   Update ✔   Delete ➖   Back ↩

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4. In the Number Value field, enter the value from the Description list that corresponds to the desired status, then click **Update**.

Message Statuses

OMX assigns a status to each incoming message. These statuses are explained as follows:

- **Read** – The email has been read.
- **Read & Replied** – The message has been read, and someone has replied to the message.
- **Read & Quick Replied** – Someone has read the message and has sent an acknowledgement message. Typically, another follow-up message is required.
- **Junk** – The message is junk.
- **Unread** – The message has not yet been read, or addressed. Could also indicate that the message has been given the status of Unread so that it will be read again.
- **Forwarded** – The message has been sent to another (internal or external) user.
- **Read & Closed** – All communication involving the message has been completed.
- **Spam** – The email message is spam. An external spam-filtering system can be used to mark appropriate messages as Spam, and then have OMX place the messages in the correct queue. Requires that a special **X-Spam-Flag: Yes** header be present in the headers of the email.

Internal.OMX SmartField

The Internal.OMX SmartField is a unique code that helps OMX identify the customer who has sent an email. Add this SmartField to the subject or to the end of the text body section of one of the following:

- your email notifications (CRM notifications)
- your template email documents

The Internal.OMX SmartField generates encrypted values that OMX uses to assign messages to the appropriate queue.

If you do not add this SmartField to the correct section of the notification or template, OMX sends all emails to the generic message queue.

Message Size Limit

Each incoming message is limited to a maximum of 10,000 characters. OMX truncates longer messages.

Viewing the Incoming Message Queue

You can view the list of incoming messages. They are organized first by status of customer, then by status of message. For details, see Message Statuses.

The list of incoming messages is divided by the status of customers. The statuses are explained as follows:

- **Active** – The customer has an order that has not yet been shipped.
- **Inactive** – The customer does not have any orders waiting to be shipped.

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- **Unknown** – The customer who sent the message cannot be determined. OMX places messages from unknown customers in The Generic Message Queue.

To view the incoming message queue:

1. In the Customer Service Activities widget, on the **Tasks** tab, click **New Emails**.

   The Message Queue window appears.

Status	Messages	Min. Date	Max. Date
Active Customers			
read	1	7/17/2010	7/17/2010
read & replied	2	9/14/2006	2/8/2008
read & closed	3	3/22/2005	1/16/2007
Inactive Customers			
unread	6	9/15/2005	7/8/2016
read	15	2/25/2005	6/6/2006
read & replied	26	1/17/2005	6/13/2014
read & closed	16	3/5/2004	3/3/2007
forwarded	4	5/21/2002	7/28/2015
junk	11	1/11/2005	3/18/2006
Unknown Customers			
unread	9	2/8/2008	11/29/2016
1 10 of 10 Record(s)			

2. This window displays the following information:
   - **Status** – Displays first the status of customers, then the status of messages. The message status is a hyperlink to all messages that have the status.
   - **Messages** – Displays the number of messages that belong to each message status.
   - **Min. Date** – Displays the date of the earliest message in each status.
   - **Max. Date** – Displays the date of the most recent message in each status.

3. Click the hyperlink of the status whose messages you want to view.

   The message queue appears. The following example displays all messages for Inactive Customers that have the forwarded status.

Message Queue - Inactive Customers - forwarded

Memo...	Order Number	Customer Number	Name	Type	Subject	Level	Sales Agent	Assigned To	Last Order Date	Receipt Date ▲
1		10413	MARY SMITH	Need Extra Attention		Silver	OrderMotion Administrator		1/19/2006	5/21/2002 12:26:00 PM
2501	0	10626	PATRICK PUCK		RE: FW: French	Platinum	Drop Shipper		10/28/2005	1/31/2005 4:13:00 AM
2	22313	11783	Brad Miller		Address Confirmation		Guest User		9/13/2006	9/14/2006 5:15:00 PM
15	34520	12385	Paul Clark		variable fill test		OrderMotion – Vaclav Ruzicka		7/28/2015	7/28/2015 9:16:00 AM
1 4 of 4 Record(s)										

> ⓘ **Note:** The results are initially sorted by the Last Order Date column header. To sort on a different column, click the column header.

The following information appears:
- **Memo ID (hyperlink)** – The unique numeric identifier of the memo.
- **Order Number (hyperlink)** – The order number associated with the memo, if applicable.
- **Customer Number (hyperlink)** – The customer number of the customer who sent the memo.
- **Name** – The name of the customer.

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- **Type** – Use to prioritize messages if required.

- **Subject** – The subject line of the email. The subject line can have a maximum of 255 characters.

- **Level** – The level of urgency assigned to the customer. Use this value to determine which message to respond to first.

- **Sales Agent** – The name of the preferred sales agent associated with this customer.

- **Assigned To** – The name of the person assigned to this memo. This person may or may not be the preferred sales agent.

- **Last Order Date** – The last date when the customer placed an order.

- **Receipt Date** – The date when OMX received the message.

4. You can perform the following operations:

   - Click the memo ID hyperlink to manage the message.

   - Click the order number hyperlink to manage the order.

   - Click the customer number hyperlink to manage the customer.

Managing a Message

The ways that you can manage a message depends on:

- the type of message (such as a reminder, memo, and so on)
- whether you have standard or advanced CRM enabled
- the status of the message

> **ⓘ Note:** This section describes managing a message with advanced CRM enabled. For more information, see Queue Monitoring Parameters.

To manage a message:

1. In the Customer Service Activities widget, on the **Tasks** tab, click **New Emails**.

   > **ⓘ Note:** You can also access the message that you want to manage when working with customer memos.

2. On the Message Queue – Unknown Customers window, click the hyperlink of the status whose messages you want to view.

3. In the message queue, click a memo ID hyperlink.

   A Details page, similar to the following, appears:

4. The Message Details window includes the following information:

   - **From** – The email address of the sender.
   - **To** – The email address of the receiver.
   - **Sent** – The date and time the message was sent.
   - **Received** – The date and time the email was received.
   - **Attachments** – The list of files attached to the email.
   - **Subject** – The subject line of the email, if one was used.
   - **Body** – The body of the email.

5. You can manage the memo in the following ways:

   - Display the incoming message queue.
   - Amend the message.
   - Reply to the message. See Replying To a Message.
   - Quick reply to the message. See Quick-Replying To a Message.
   - Add a reminder date to the message.
   - Assign the message to a user.
   - Forward the message.
   - Mark the message as Read, Unread, Closed, or Spam.

Amending a Message

Amending a message enables you to add or edit text in the message. For example, you can add a note about a customer.

> **ⓘ Note:** Amended text can be viewed only internally by OMX users. OMX removes the amended text before sending the message to a customer.

You can amend a message regardless of its status.

To amend a message:

1. In the Customer Service Activities widget, on the Tasks tab, click the **New Emails** link.

2. In the Message Queue window, click the hyperlink of the status whose messages you want to view.

3. In the message queue, select the ID of the message that you want to amend.

4. In the Details window, click **Amend**.

   The Amend Memo window appears.

The Original Memo section displays all previous text entered in the memo. Amended text is appended to the end of the message. Each amended text section is indicated by the text **Additional Memo**.

5. In the Amendment section, enter the text to add to the memo.

   This text is added to the bottom of the memo text. The writer's OMX username, email address, profile, date, time, and IP address are also added.

6. To save your information, click **Update**.

Replying To a Message

Replying to a message enables you to create a new email with a user-defined response. The status of the original email changes to **Read & Replied** both in the SmartLabel and in the message queue.

You can create an email memo using free form text or by inserting an active template.

To reply to a message:

1. In the Customer Service Activities widget, select the Tasks tab, then click the **New Emails** link.

2. In the Message Queue window, click the hyperlink of the status whose messages you want to view.

3. In the Message Queue window for the selected status, select the Memo ID of the message to which you want to reply.

4. In the Details window, click **Reply**.

   The Reply by Email window appears.

Use this window to specify the information and formatting of the memo to which you are replying.

This text box contains all previous text that has been entered for this memo, as well as information about any operations that have been performed, such as forwards or assignments. The OMX username of the person who entered text or performed an operation, as well as the date and time, is included.

If displayed, you can use the scroll bar on the right-hand side to view the rest of the memo.

For more detailed information about this window, see Sending an Email to a Customer.

Adding a Reminder Date To a Message

A reminder date is a way of reminding yourself to review a message by a specified date. The reminder shows up as a blinking red dot beside the message in the Existing Entries window of the Customer Service page for the customer. The reminder appears when the reminder date occurs, and remains until you remove the reminder date from the message.

To view reminders assigned to you, click the **Reminders assigned to You** link in the Memos & Reminders section of the Customer Service Activities widget.
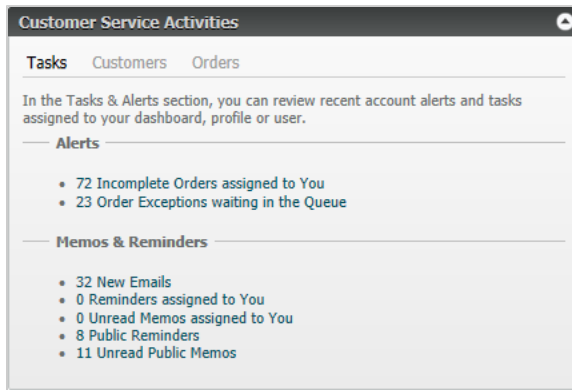
You can generate the Reminder List report to view a list of orders that contain a memo with a reminder date.

You can also change the reminder date as needed or you can remove it.

> **Note:** You cannot assign a message to a user if a reminder has been added. You must remove the date before assigning.

To add a reminder date to a message:

1. In the Customer Service Activities widget, on the Tasks tab, select the **New Emails** link.

2. In the Message Queue window, select the hyperlink of the status whose messages you want to view.

3. In the message queue, select the ID of the message to which you are adding a reminder date.

4. In the Details window, click **Remind**.

   The Reminder window appears.
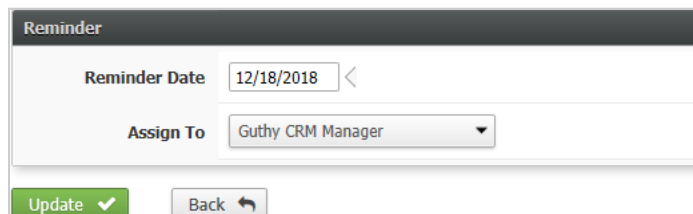
5. In the Reminder Date field, select the date to display the message reminder.

   This value must be later than the current date.

   > **Note:** Removing the reminder date effectively cancels the reminder for this message. The reminder is not listed in the reminder count in the Customer Service Activities widget.

6. (optional) Use the Assign To list to assign the memo to a user. If you do not select a user, the message is included in the Public Reminders link.

7. Click **Update**.

   OMX displays a message to confirm that the reminder date was saved successfully. If you assigned the message to a user, then the My Reminders count is increased for that user. If you did not assign the message to a user, the Public Reminders count increases by 1.

Forwarding a Message

Forwarding a message enables you to send that message to either an internal user or an external user. You can add a template to the message before forwarding it if desired.

You can forward a message that has any status except for **Junk**. When you forward a memo, the status of the memo changes to **Forward**.

The recipient email address defaults to the address of the customer.

To forward a message:

1. In the Customer Service Activities widget, on the **Tasks** tab, select the **New Emails** link.
2. From the message queue, select the ID of the message that you want to forward.
3. In the Details window, click **Forward**.

   The Forward by Email window appears.

4. You can perform the following operations:
   - Specify the information and formatting of the email.
   - Edit the body of the email in the text box. This text box contains all text entered for this memo, plus information about operations performed, such as forwards or assignments. The name of the person who entered text or performed an operation appears, as well as the date and time. Use the scroll bar on the right-hand side to view all of the memo.
   - Select a template salutation from the list.
   - Attach any available PDFs by checking the appropriate check box.
5. Click **Send**.

Marking a Message as Read, Unread, Closed, or Spam

You can mark a message as read, unread, closed, or spam. The result of each change is explained as follows.

- **Marking a message as Read** – Indicates that the status of the message has changed from **new** to **read** because it has been viewed by a user. You can manually change the status by marking it as **read** or **unread**.

- **Marking a message as Unread** – Indicates that the message is being re-added to the incoming message queue so that the required person can review it.

- **Marking a message as Closed** – Indicates that the message is no longer an open issue. The issue has been addressed and needs no further attention. This enables you to control the number of messages in the message queue. This button is not available for messages with a status of **unread**.

- **Marking as Spam** – Changes the status of the message to **Junk**. The message is removed from the list, and cannot be retrieved.

> **(i) Note:** The message icon in the SmartLabel also changes according to the status of the message.

To mark a message as read, unread, closed, or spam:

1. In the Customer Service Activities widget, on the Tasks tab, select the **New Emails** link.

2. In the Message Queue window, select the hyperlink of the status whose messages you want to view.

3. In the message queue, click the ID of the message you want to mark.

4. In the Details window, select one of the following buttons:

   - **Mark as Read**
   - **Mark as Unread**
   - **Mark as Closed**
   - **Mark as Spam**

   OMX displays a message indicating whether the status of the message has changed accordingly.

The Generic Message Queue

The generic message queue is a storage area for all incoming messages where the customer who sent the email could not be determined. When it receives an outside message, OMX attempts to determine the customer queue for the message and place it there. Messages are placed in the generic message queue if they could not be associated with a particular customer.

You can manage the messages in the message queue by:

- Viewing the generic message queue
- Viewing the header of a message
- Assigning the message to a customer
- Removing the message

Viewing the Generic Message Queue

You can view the messages in the message queue. The number of messages in the queue appears in the Memos & Reminders section of the Customer Service Activities widget.

To view the generic message queue:

1. In the Customer Service Activities widget, on the **Tasks** tab, click **New Emails**.

   The Message Queue window appears.

Message Queue			
Status	**Messages**	**Min. Date**	**Max. Date**
Active Customers			
read	1	7/17/2010	7/17/2010
read & replied	2	9/14/2006	2/8/2008
read & closed	3	3/22/2005	1/16/2007
Inactive Customers			
unread	6	9/15/2005	7/8/2016
read	15	2/25/2005	6/6/2006
read & replied	26	1/17/2005	6/13/2014
read & closed	16	3/5/2004	3/3/2007
forwarded	4	5/21/2002	7/28/2015
junk	11	1/11/2005	3/18/2006
Unknown Customers			
unread	9	2/8/2008	11/29/2016
1 10 of 10 Record(s)			

2. Click the **unread** hyperlink for Unknown Customers.

   The Message Queue – Unknown Customers window appears.

Message Queue - Unknown Customers				
ID	**Date ▲**	**Type**	**Sender**	**Subject**
724	☐ 2/8/2008 2:25:00 PM	CustomerService	Hass Mamdani	eight
725	☐ 2/8/2008 2:25:00 PM	CustomerService	Hass Mamdani	nine
726	☐ 2/8/2008 2:25:00 PM	CustomerService	Hass Mamdani	ten
727	☐ 2/11/2008 2:28:00 PM	CustomerService	Hass Mamdani	1
728	☐ 2/11/2008 2:28:00 PM	CustomerService	Hass Mamdani	1
729	☐ 11/29/2016 4:34:00 AM	CustomerService		uniceode
730	☐ 11/29/2016 4:34:00 AM	CustomerService		Fwd: uniceode
731	☐ 11/29/2016 4:34:00 AM	CustomerService		test1
732	☐ 11/29/2016 4:34:00 AM	CustomerService		test2
733	☐ 11/29/2016 4:34:00 AM	CustomerService		test3
1 10 of 10 Record(s)				

Delete ➖   Back ↩

> **Note:** The results are initially sorted by the ID column. To sort on any other column, click the column's header.

This window displays the following information:

- **ID (hyperlink)** – The ID of the message. The list may not be complete because messages that are actually generic may have been assigned to customers in error.
- **Date** – The date and time when the message was received.
- **Type** – The type of message.
- **Sender** – The name of the person who sent the message.
- **Subject** – The subject of the message. This can help you identify the message that you want to manage.

3. You can perform the following operations:

   - Click a message ID hyperlink to manage the message.
   - Check the boxes of the messages that you want to remove, then click **Delete** to complete the operation.

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> **ⓘ Note:** You can also remove a message when managing its details.

Viewing the Header of a Message

You can view information about the header of the email to see where the message originated. This can help identify spam. The header normally lists all the computers that were involved in the transport of the message from the sender to the recipient.

To view the header of a message:

1. In the Customer Service Activities widget, on the **Tasks** tab, click **New Emails**.
2. In the Message Queue window, select the unread hyperlink for Unknown Customers.

   The Message Queue - Unknown Customers window appears.
3. From the list of messages in the message queue, select the hyperlink in the ID column for the message.
4. In the View Message window, click the header hyperlink.

   The View Message window appears:

Assigning a Message To a Customer

Assigning a message to a customer enables you to take a message from the generic message queue and place it in the memos list for a selected customer.

You can choose an existing customer or create a new customer.

After you assign it to a customer, the message moves to the customer's message queue. The customer message is given the next ID in that queue. The number of messages in the generic queue is decreased by one, and the ID in the generic message queue is not re-used.

The status of the message before being assigned is Unread, and after being assigned, it is set to Read & Replied.

To assign a message to a customer:

1. In the Customer Service Activities widget, on the **Tasks** tab, click the **New Emails** link.

   The Message Queue window appears.
2. In the Unknown Customers section, click the **unread** hyperlink .

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3. On the Message Queue – Unknown Customers window, click the ID of the message that you want to assign to a customer.

4. On the View Message window, click **Reply**.

On the resulting page, two windows appear:

The top window enables you to assign the message to an existing customer. The bottom window enables you to create a customer and assign the message to that customer. Both procedures are explained as follows.

Assigning a Message to an Existing Customer

Use the **Assign to existing Customer & Reply** page to assign a message to an existing customer.

The Last Customer Viewed section displays the following information about the last customer who was most recently viewed:

- **Customer Number (hyperlink)** – The number of the last customer that was viewed. This is the same customer shown in Recent Objects.
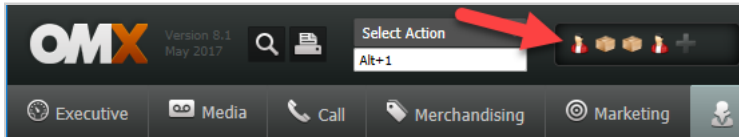
- **Name** – The last and first name of the most recently viewed customer.
- **City** – The city and zip code of the most recently viewed customer.

To assign a message to an existing customer:

1. In the Customer Number field, enter the number of the customer to receive the message.

   You must enter an existing customer number.

   > ✔ **Tip:** To use the customer shown in the Last Customer Viewed section, click the Customer Number hyperlink.

2. Click **Assign & Reply**.
3. In the Reply by Email window, add more details to the email as needed.
4. Click **Send**.

Creating a Customer and Replying

Use the **Create new Customer & Reply** window to send a message to an internal person who has not yet been added to the system. For example, use this option if you want to assign an incoming message to a new customer service representative.

> ⓘ **Note:** When creating and replying to an email from an unknown customer, OMX automatically assigns the user as the Preferred Sales Agent.

### To create a new customer and reply:

1. In the Name fields, select the title, and enter first name, middle initial, and last name of the customer.

   The first name and last name values are required.

   You can enter a maximum of 40 characters for the first and last names, and one character for the middle initial.

> ℹ️ **Note:** If you are entering a last name that contains a second uppercase character (for example, MacDougal), set the AutoCasingUI company parameter to **TitleCase**.

2. (optional) In the Email field, enter the email address of the customer.

   OMX uses this email address when emailing a memo, invoice, or credit memo to the customer.

   You can enter multiple email addresses, separated by a semi-colon.

   Email addresses are listed in the customer SmartLabel.

   The format of the email address is not validated.

   You can enter a maximum of 50 characters.

> ℹ️ **Note:** Even though not specified on this page, the country for this user (as seen in the Basic Information for a Customer) defaults to the value specified in Customer Base (Setup > Fulfillment and Shipping > Customer Base).

3. Click **Create & Reply**.

4. In the Reply by Email window, add more details to the email as needed, then click **Send**.

   OMX sends your email to the specified customer.

   The new customer number appears in the memo SmartLabel at the top of the page.
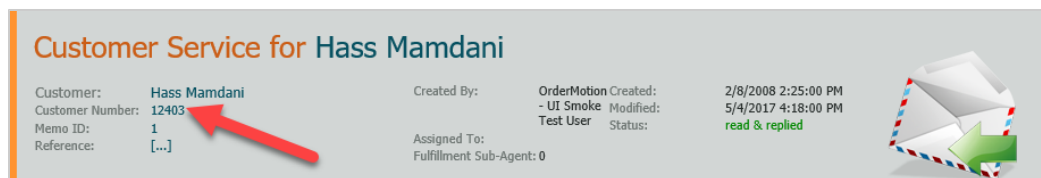
## Managing a Message In the Message Queue

After you select a message in the message queue, you can manage the message.

To manage an incoming message:

1. In the Customer Service Activities widget, on the **Tasks** tab, click the **New Emails** link.

   The Message Queue window appears.

> ✔️ **Tip:** You can also access this window by selecting the Message Queue hyperlink from the Customer Service Activities widget.

2. In the Unknown Customers section, click the **unread** hyperlink.

3. In the Message Detail window, from the list of messages in the message queue, select the message that you want to manage.

   The View Message window appears.
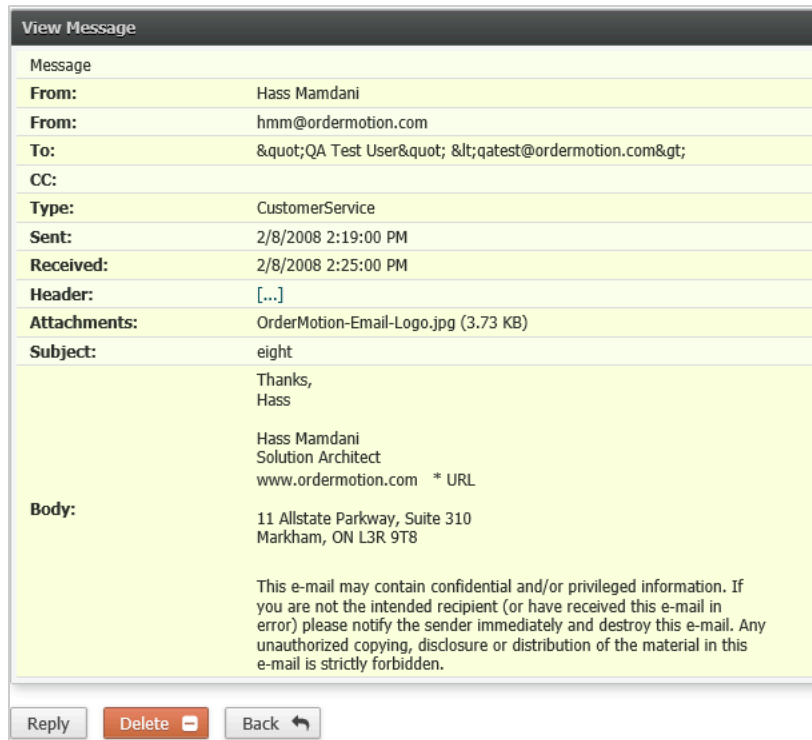
This window displays information about the message. The following information appears:

- **From** – The name of the person who sent the email. One is the name of the sender and the other is the person's email address.

- **To** – The recipient of the email.

- **CC** – The names of any users who were copied on the email. OMX does not support carbon copying, but if carbon copy names were added, those names are shown.

- **Type** – The type of email. This is a plain text field.

- **Sent** – The date when the message was sent.

- **Received** – The date and time when the message was last received in OMX.

> **(i) Note:** The Received date can be earlier than the Sent date based on the time zones of the machines.

- **Header (hyperlink)** – A hyperlink to the header of the email.

- **Attachments** – The name and size of any files that were attached to the email.

> **(i) Note:** You cannot receive attachments when sending emails to the system.

- **Subject** – The subject line of the email.

- **Body** – The entire text of the email.

4. You can perform the following operations:

- Click the **header hyperlink** to view the header of the message.

- Click **Reply** to assign the message to a customer.

- Click **Delete** to remove the message from the message queue.

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Removing a Message

This feature enables you remove an individual message from the generic message queue. The message count on the Customer Service Activities widget is reduced by 1.

You can simultaneously remove multiple messages from the generic message queue.

To remove a message:

1. In the Customer Service Activities widget, on the **Tasks** tab, select the **New Emails** link.
2. In the Message Queue window, select the unread hyperlink for Unknown Customers.
3. In the Message Detail window, from the list of messages in the message queue, select the message that you want to delete.
4. In the View Message window, click **Delete**. A confirmation message appears:

Queue Monitoring Parameters

Use this section as a reference to learn how to understand and modify the parameters that control queue monitoring.

AdvancedCRM

This parameter allows you to indicate whether advanced Customer Relationship Management (CRM) should be enabled (True) or disabled (False). If set to False, then OMX uses standard CRM. Standard CRM enables you to amend message text and add a reminder date, among other operations. If set to True, then advanced CRM is used. Advanced CRM provides additional features, such as printing and emailing invoices, adding a reminder date, and amending message text.

By default, this parameter is set to False.

IncomingMessageLastStatus

This parameter allows you to specify the status of messages that you want to be displayed in the incoming message queue.

For this parameter, the values are hierarchical, meaning that specifying a value displays all messages with the specified status, plus all messages that have a lower value. For example, specifying a value of 25 means that messages with values 24, 20, and 10 are also displayed.

The values are explained in the following table:

Set IncomingMessageLastStatus to this value:	When you want to do this:
0	display no messages
10	display messages with the status of Unread
20	display messages with the status of Read or Unread

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Set IncomingMessageLastStatus to this value:	When you want to do this:
24	display messages with the status of Read & Quick Replied, Read, or Unread
25	display messages with the status of Read & Replied, Read & Quick Replied, Read, or Unread
26	display messages with the status of Read & Closed, Read & Replied, Read & Quick Replied, Read, or Unread
50	display messages with the status of Forwarded, Read & Closed, Read & Replied, Read & Quick Replied, Read, or Unread
90	display messages with the status of Junk, Forwarded, Read & Closed, Read & Replied, Read & Quick Replied, Read, or Unread

Order Memos

This chapter describes the use of order memos in OMX.

What Is an Order Memo?
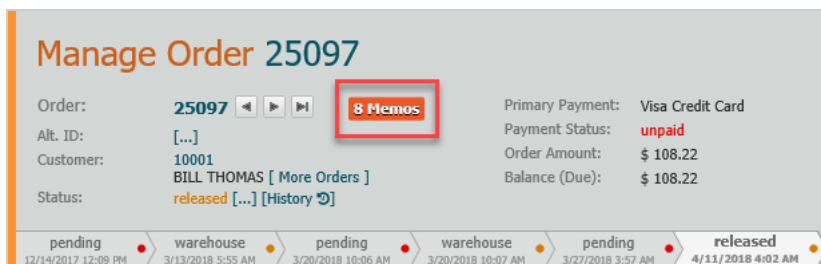
An order memo is a note that is attached to a customer record, or to an order within a customer's record.

You can create memos to record useful information related to an order or a customer. For example, a customer service representative can add a memo to an order to assist another representative to take ownership of that order.
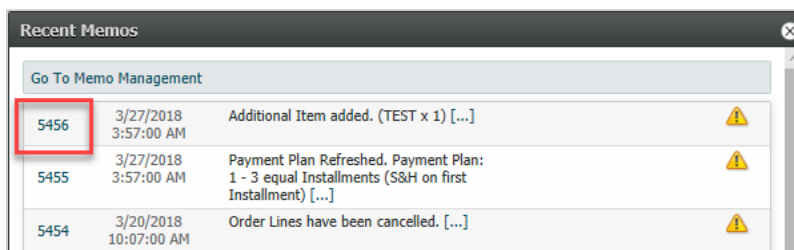
> **Note:** OMX automatically logs most of the changes to an order as a memo.

Viewing Memos

To view the Recent Memos list, click the orange Memos hyperlink in the order SmartLabel.
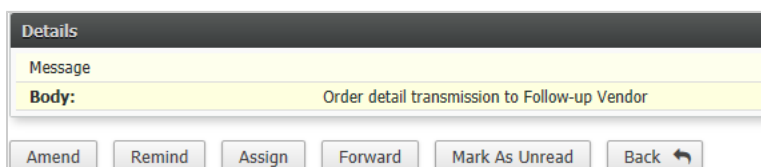
To view an individual memo, click the memo ID.

The memo opens in the Details window.

From here, you can add more information to the memo (Amend), add a reminder (Remind), or take action (Assign or Forward).

Memo Types

Order memo types permit you to specify the reason why an order memo was created. Assigning a memo type can help the person reading the memo determine the tasks to be performed.

All memo types are user-defined. You can view the list of all order memo types that exist in OMX, add new ones, and update existing ones. OMX logs all user-defined memos in the Memos section of the Customer module.

> **ⓘ Note:** In addition to user-defined memos, OMX also generates and logs its own memos. For more information, see Customer Memos.

To configure your memo types:

1. On the Setup tab, click Configure: **Your Account**.

2. In the Customer Service section of the Setup window, click **Memo Types**.

   OMX displays a list of all existing memo types.

3. Click **Add**.

   The New Memo Type window appears.

4. In the New Memo Type window:

   - Check the **Active** box.

   - Enter a description of the memo type. You can enter up to 50 alphanumeric characters. Spaces and mixed case are allowed.

   - If you want the memo type to be available in an upload, check the **XML Transmission** box.

   - If you want the memo type to be restricted to users with additional profile permissions, check the **Is Restricted in UI** box.

5. Click **Save**.

   OMX adds the new memo type to the Existing Memo Types list.

Creating Or Updating a Memo

You can create new memos or update existing memos for both orders and customers.

Creating an Order Memo

Create an order memo to record important information pertaining to that order.

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To add a new memo to an order:

1. In the Manage Order SmartLabel, click **+ Memo** (next to the Order number) or the **Memo** button.

The New Memo window appears.

2. In the New Memo window, complete the fields as follows:
   - **Reference** – Use the Order Number with or without the Shipment Number, or leave both blank to have OMX assign a default number.
   - **Reminder Date** – If follow-up is needed, select a date to have OMX display a reminder.
   - **Assign To** – Select from the list of your defined OMX users.
   - **Agent Code** (optional) – ID code of the customer service representative to whom the memo is assigned.
   - **Memo Type** – Select a defined memo type from the list.
3. Enter the memo text into the large box at the bottom, then click **Save**.

Updating a Memo

If an order has one or more memos associated with it, OMX includes an orange link in the SmartLabel for that order.

To update an existing memo:

1. In the SmartLabel, click the orange link to display the list of recent memos.
2. Click **Go To Memo Management**.
3. Click the ID number for the memo to open it for editing in the Details window.

4. Use these buttons to update the memo:
   - **Amend** – Add more information.
   - **Remind** – Set up a reminder. You must choose a date and assignee.
   - **Assign** – Select from the list of your defined OMX users.
   - **Forward** – Email the memo to another customer service representative for follow-up.
   - **Mark As Read** – Make a note in OMX that you have read the memo.

Customer Memos

Customer memos consist of calls, letters, email (excluding broadcasts or mass email) that are sent to a customer, as well as system-generated memos. You can create the memos (letters, calls, or email) manually or you can upload the memos in bulk.

Viewing All Memos for a Customer

You can view all memos for a customer from the Manage Customer page.

To view all memos for a customer:

1. Display the Manage Customer page for the customer. See Finding a Customer in OMX.
2. Click the **Memos** hyperlink in the SmartLabel or the **Memos(#)** button.

3. On the Recent Memos window, click **Go To Memo Management**.

The Existing Entries window appears.

Use the buttons on this window to:

- **Expand** – See all information on all memos. The default view shows a one-line summary of each memo. Click Collapse to return to the default view.

- **Memo** – Create a new memo for that customer.

- **Notifications** – See any notifications in OMX pertaining to this customer.

- **Letter** – Create a paper letter (from a template) to mail to this customer.

- **Call** – Create a new memo as a record of a customer call.

- **E-Mail** – Create an email (from a template) and send it to this customer.

4. To open any message for editing, click the ID number for that message.

Creating a Customer Memo

You can create a memo for a specific customer. The memo is added to the customer's memo count, which is indicated on the Memo button for the customer.

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To create a customer memo:

1. Locate the customer that you want to manage.

   > ✔ **Tip:** In the search field, enter `c customer number`.

   The Customer and Order Search window appears.

2. Click **Memos(#)**.

   The Existing Entries window appears.

3. Click **Memo**.

   The New Memo window appears.

4. (optional) In the Reference section, use one of the lists to associate the memo with either an order or a shipment.

   If you do not specify a value, this becomes a general customer memo.

5. In the Reminder Date field, enter a date for the reminder icon to be displayed.

6. Use the Assign To list to assign the memo to one of the users in your account.

   The memo count for this user is increased by one.

   The memo is available in either My Reminders or My Memos of the CRM Information section on the Home page.

7. In the Agent Code field, enter the name of the sub-agent who will be assigned this memo.

   You can click the SmartFind icon to search for the fulfillment sub-agent.

8. (optional) Use the Memo Type list to select the type of memo that you are creating.

   This enables you to identify the type of information in the memo.

9. In the text box, enter the text of your memo.

10. Click **Save**.

Sending an Email to a Customer

You can create and send email to customers.

> ⓘ **Note:** There are certain restrictions for users with the customer service profile.

You can enter free text in an email, or attach an active template to specify the text and format of the body of the email.

> ⓘ **Note:** In the following example, the **AdvancedCRM** company parameter is set to **True**.

To send an email to a customer:

1. Locate the customer to whom you want to send the email.

   > ✔ **Tip:** In the search field, enter `c customer number`.

2. Click **Memos(#)**.

3. Under the Existing Entries window, click **E-Mail**.

   The New Email window appears. This window enables you to specify the information and formatting of the email and attach any available shipment PDFs. You can also add text as needed.

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4. In the Recipient Email field, enter the email address of the recipient.

   The recipient email address defaults to the customer's email address, but you can overwrite this value.

   You can enter multiple email addresses by separating them with a semi-colon. For example,

   jsmith@omxcustomer.ca; jtrudeau@gc.ca; myomxemail@mycompany.com

5. In the Subject field, enter the subject of the email. You can enter up to 255 characters.

6. (optional) In the Insert Template section, select a template from the list and click **Insert**.

   The template is automatically displayed in the email message.

   You can edit or add to the template text as desired.

7. In the Attach PDF section, check the boxes of the files that you want to attach to the email.

8. To email the message to the addresses specified in the Recipient Email field, click **Send**.

   OMX displays a message indicating whether the email was successfully sent.

   The memo count for the customer is increased.

   OMX takes you to the Details window where you can view and manage the memo.

System-Generated Customer Memos

System-generated memos are automatically triggered when certain events, such as changing shipping instructions, occur. These memos are not user-configurable, and are available simply for viewing and record-keeping. The user does not receive and cannot view these system-generated memos. Additionally, the memos are logged as soon as they occur, so do not require back-end processing to run to be logged.

OMX records system-generated memos for customers.

OMX generates an order memo when you update either the billing address or the shipping address for an existing order. You can display the memo by clicking the link on the related Manage Order or Manage Customer page. In the Recent Memos window, the memo includes two links to the relevant address history page.