

Portal Prodigy[™]
Fulfillment Features in Detail

Chapter Excerpt from Software User & Administration Guide

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1.1	Introduction.....	2
1.2	The Visitor Experience	4
1.3	Components	4
1.3.1	Search for Order Items	4
1.3.2	Fulfillment Batch	6
1.4	Feature Administration.....	8
1.5	Tutorials	8
1.5.1	Fulfill a Batch of Product Orders.....	8

1.1 Introduction

This chapter presents a detailed explanation of the order fulfillment process. Fulfillment is the process of delivering ordered goods or services to the customer. PortalProdigy provides the option, where applicable, to decide when orders should be considered fulfilled for purposes of recording sales transactions, creating invoice dates, and settling credit card charges. In some cases recording of the fulfillment process is performed automatically by PortalProdigy; Exchange orders are an example of this. Exchange orders are automatically fulfilled when the Exchange record is saved. Other features provide multiple options; Event Registration is an example of this. Event Registrations can have fulfillment recorded at the time of registration, automatically on the event date, or manually by an Administrator.

When an Order has been fulfilled, PortalProdigy sets the Order's Order Status field to *Fulfilled*. If some of the Order's items cannot be fulfilled, the Order Status is set to *Partially Fulfilled*. All orders created by all Feature Components including Events, Exchanges, Memberships, and Products, must be fulfilled in order to complete the order process.

The fulfillment process for Product orders is used to fulfill orders, relieve inventory and post to the GL. Product Orders can also be configured to post (record) sales transactions to the GL at the time the order is placed. The PortalProdigy Product Download feature automatically fulfills downloaded items at the time the order is placed.

PORTALPRODIGY also supports third party fulfillment. PORTALPRODIGY's third party fulfillment feature permits Vendors to be given limited access to the Batch Fulfillment feature, permitting the Vendors to fulfill ordered items where they are the designated Responsible Party.

Fulfillment feature benefits include:

- Provides automated fulfillment option for each applicable feature component.
- Provides order by order fulfillment processing as well as batch fulfillment processing.
- Prints Picking List for fulfillment batch.
- Prints Packing Slips for each order in fulfillment batch.
- Supports partial fulfillment of orders and automatically creates backorder for unfulfilled items.
- Relieves inventory and committed quantities.
- Automated recording of sales transactions for accounting purposes.
- Automated Settlement of Credit Card charges.
- Supports Third Party Fulfillment.

- Tracks shipping dates by item.
- Event registrations can be fulfilled automatically on date of Event, automatically at time of registration, or they can be manually fulfilled at the appropriate time by an authorized Administrator.
- Print Fulfillment and Inventory Transaction reports.

Some of the components, fields and settings of the Payments feature, discussed in detail in this chapter, are:

Search For Order Items page

Batch #
Retrieve Batch option
Feature

- Products
- Events
- Pres Releases

Order Status:

- New Orders Only
- Backorder Only
- Both

Responsible Group
Item ID
Item Code
Order Date
Order #
Shipper

Shipping Method

Payment Methods:

- All Items on Order –
 - Only Items that can be Fulfilled
- Exclude Orders with Partial Availability where partial Shipment is not Allowed
- Sort by:
- Order
 - Item
 - Product code
- Create New Batch option
Clear criteria option
Print page option
Go To Main Menu option

Fulfillment Batch page:

Order ID
Item ID
Product Code
Color & Size
Qty to Fulfill
Qty Shipped
Qty Canceled
Qty Backordered
Partial Ok
Save batch option
Process Batch option
Clear option
Print page option
Cancel option
Close option

1.2 The Visitor Experience

Visitors do not interact with the fulfillment process.

1.3 Components


Also see the Chapters titled ‘Orders Features in Detail’ and ‘Items/Products Catalog Features in Detail’. The following components are used to Fulfill Orders.

1.3.1 Search for Order Items

Used to select which orders to fulfill.

Search section:



- Enter Batch # to retrieve an existing Batch – used to retrieve a pre-defined batch when you know the batch #. Enter the number then click the  button.

Or Enter Criteria to Create a New Batch section:

The screenshot shows a web form titled "Or enter criteria to create a new batch". It contains several sections for filtering and creating a batch:

- Feature:** Radio buttons for ☒ Products, ☐ Events, and ☐ Press Releases.
- Order Status:** Radio buttons for ☐ New orders Only, ☐ Backorders Only, and ☒ Both.
- Responsible Group:** A dropdown menu currently showing "All".
- Item ID:** A text input field.
- Item code:** A text input field.
- Order Date:** Two date pickers with "From:" and "to:" labels, each with a calendar icon.
- Order #:** Two text input fields with "From:" and "to:" labels.
- Shipper:** A dropdown menu currently showing "All".
- Shipping Method:** A dropdown menu currently showing "Next Day".
- Payment Methods:** Checkboxes for ☒ On Account, ☒ Pre-Paid, ☒ Pay By Mail, ☒ Pay At Event, and ☒ C.O.D.
- Include:** Radio buttons for ☒ All items on Order and ☐ Only items that can be Fulfilled.
- Exclude Orders with Partial Availability where Partial Shipment is not Allowed:** A checkbox that is currently unchecked.
- Items per page:** A text input field.
- Sort by:** Radio buttons for ☒ Order, ☐ Item, and ☐ Product Code.

A "Create New Batch" button is located at the bottom right of the form.

- Feature – used to select the feature component that you are posting the batch for. Select from one of the following:
 - Products – selects orders for products only.
 - Events – selects orders for event registration only.
 - Pres Releases – selects orders for press releases only.
- Order Status – used to select the status of orders to post. The following options are available:
 - New Orders Only – Fulfill orders that have not been previously fulfilled or partially fulfilled and that are not backorders.
 - Backorder Only – Fulfill backorders only.
 - Both – Fulfill all orders with unfulfilled items.
- Responsible Group – selects orders with items that match the specified group. Item Management contains the field Responsible Group which is used to assign a group responsible for fulfilling the item. This can be used to assign third party suppliers and vendors so they can retrieve and fulfill items.
- Item ID – used to select orders containing the specified product based on Item ID.
- Item Code – used to select orders containing the specified product based on Item Code.
- Order Date – used to select orders based on the order date range.
- Order # - used to select orders based on the order number range.

- Shipper – used to select orders based on the Shipper.
- Shipping Method – used to select orders based on the shipping method.
- Payment Methods – used to select orders based on the payment method.
- Include – the following choices are available:
 - All Items on Order – shows all items including items that are not in stock.
 - Only Items that can be Fulfilled – shows only items that are in stock and have quantities available for fulfillment.
- Exclude Orders with Partial Availability where partial Shipment is not Allowed – when checked, it will exclude orders that contain items that cannot be completely fulfilled where the customer has requested to not receive partial shipment.
- Items per page – used to select the number of results in matches.
- Sort by – used to select the sort order of the matches. The following choices are available:
 - Order – sorts by Order #.
 - Item – sorts by Item ID.
 - Product code – sorts by Product Code.

Options:

Create New Batch	Submits criteria to server and returns batch of order items to be fulfilled.
Clear	Clears the search criteria.
Print	Prints the website page to the user's local printer.
Main Menu	Closes the page and returns to the Site Administration Menu.

1.3.2 Fulfillment Batch

Used to fulfill the order items matching the entered criteria.

Fulfillment Batch #4								
Page 1 of 1				Total matches: 6				
OrderID	ItemID	Product Code	Color & Size	Qty to Fulfill	Qty Shipped	Qty Canceled	Qty Backordered	Partial OK
31	219	Cos-00028	Autumn	3	<input type="text" value="3"/>	<input type="text" value="0"/>	0	<input checked="" type="checkbox"/>
31	220	Cos-00028	Summer	3	<input type="text" value="3"/>	<input type="text" value="0"/>	0	<input checked="" type="checkbox"/>
31	221	Cos-00029	autumn	2	<input type="text" value="2"/>	<input type="text" value="0"/>	0	<input checked="" type="checkbox"/>
31	222	Cos-00029	summer	4	<input type="text" value="4"/>	<input type="text" value="0"/>	0	<input checked="" type="checkbox"/>
31	223	B-lp001		5	<input type="text" value="5"/>	<input type="text" value="0"/>	0	<input checked="" type="checkbox"/>
29	217	Cos-00029	summer	3	<input type="text" value="3"/>	<input type="text" value="0"/>	0	<input type="checkbox"/>

- Order ID – read only.
- Item ID – read only.
- `Product Code- read only.
- Color & Size – read only.
- Qty to Fulfill – read only. For new orders it lists the order quantity. For backorders it lists the remaining quantity on order that has not been fulfilled.
- Qty Shipped – defaults to the lesser of either the quantity on hand or the quantity to fulfill. Either change the default value or leave as is.
- Qty Canceled – used to enter a quantity to cancel.
- Qty Backordered – read only. Lists the quantity on backorder that cannot be fulfilled.
- Partial Ok – checked when customer indicated that it is Ok to send partial shipment.

Options:

<input type="button" value="Save"/>	Save the batch. Saving does not fulfill the items.
<input type="button" value="Process Batch"/>	Processes the fulfillment of the items where either a Qty Shipped or Qty Canceled quantity was specified.
<input type="button" value="Clear"/>	Clears the search criteria.
<input type="button" value="Print"/>	Prints the website page to the user's local printer.
<input type="button" value="Cancel"/>	Cancels all changes and closes the page.
<input type="button" value="Close"/>	Closes the page and returns to the Site Administration Menu.

1.4 Feature Administration

Using Batch Fulfillment, authorized administrators can quickly and easily fulfill batches of orders based on specified search criteria. Batch Fulfillment can also be used to adjust order item quantities that have been canceled. Batch Fulfillment provides the option of processing batches immediately or saving the work in process so they can be retrieved, completed and processed at a later time.

Third Parties (Vendors) can be setup to directly fulfill ordered items. They will be limited to viewing and fulfilling only items where they are designated as the responsible party. The following steps should be taken to implement third party fulfillment:

- Create a Security Group for each Vendor that will fulfill orders online.
- Create Company record for each Vendor.
- Create Contacts for each Vendor and assign the Vendor's security group to each contact record.
- Set each Product Item record's Responsible Group to its Vendor's Security Group.
- Either provide each vendor with the URL to the Batch Fulfillment page, or create a contact menu containing the link and assign this menu to each contact that is setup to fulfill orders.

Administrators should follow the steps outlined in the Tutorials section of this chapter in order to batch fulfill orders.

1.5 Tutorials

The following tutorials explain the steps necessary to administer and batch fulfill orders.

1.5.1 Fulfill a Batch of Product Orders

1. Read chapters of Administrator Manual titled "Order Features in Detail" and "Fulfillment Features in Detail".
2. Go to Site Administration Menu.
3. Click on the Fulfillment browse button located in the Transaction Mgmt. section.
4. Using the Search for Order Items page enter search criteria then click the Create New Batch button.
5. Locate the Order in Found Orders and click on [Fulfill](#) link to display the Order Fulfillment page. The Fulfill link is only displayed for Orders that are ready for fulfillment. It is not displayed for Orders that have not been processed or that have already been fulfilled.
6. Enter the Qty. Shipped for each Item that is being fulfilled.

7. Click the Process Batch button.
 8. At the warning prompt “This process updates both inventory and orders and cannot be undone!” click Ok. This causes the following:
 - a. Inventory quantities to be updated.
 - b. The Order Status of the fulfilled Orders to be set to *Fulfilled* or *Partially Fulfilled*
 - c. The [Fulfill](#) link to no longer be visible in Search for Orders page for each fulfilled Order with Order Status set *Fulfilled*.
 9. Done.
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