Orders (F-ORD)

Function	Orders
Date	September 2017
Author	Gareth Gorman
Version	Version 1.0
Status	Working

Version	Date	Summary of changes	Author
1.0	September 2017	Created	Gareth Gorman

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1. Introduction

The order admin is the central point to view and manage orders on your site. The exact processes defined for managing orders will be process driven, therefore not all the actions described in this section will be applicable to internal processes.

Out of Scope

This functional specification is for the Commerce platform only. Integrations with 3rd party systems such as warehouses are out of scope and will be documented separately as part of the implementation specification phase.

2. Commerce Admin

F-ORD/01.0	Orders
F-ORD/01.1	The system will allow authorised users to search for orders. The default fields searched are ● Order Number ● Package Number ● Customer Name ● Email Address ● Product Name

F-ORD/01.2	The system will allow authorised users to filter their search for orders by: ● Package date ● Order Date ● Customer Email ● Billing Name ● Billing Company ● Priority ● Additional Information ● Internal Review ● Processing State ● Product SKU ● Item Location - Bin ● Item Location - Aisle ● Item Location - Shelf ● Discount ID ● Site ● Shipping Country

	● Shipping Method ● Category ● Package Source ● Channel ● Warehouse Status
F-ORD/01.3	The system will allow authorised users to view/sort a list of orders by: ● Orderid ● External Id ● Package ● Status ● Delivery Method ● Pick List ● Customer ● Quantity ● Total ● Date

F-ORD/01.4	The system will allow authorised users to view the details of the order with the following information:
	
	Order Information
	● Started date/time
	● Completed date/time (if applicable)
	● Site
	● Channel
	● Fraud review status
	● Internal review Status
	● Payment
	● Items Totals
	    ○ Original
	    ○ Current
	    ○ Shipped
	    ○ Outstanding
	● Order Discounts (if applicable)
	
	Package Information
	● Status
	● Source
	● Status
	● Stockroom
	● Loyalty Points Pending (if applicable)
	● Billing Address/phone/email
	● Delivery Address/Phone
	● Delivery options
	● Delivery status
	● Delivery tracking number (if applicable)

	● Delivery note (if applicable) Order Lines ● Lineid ● Product Name ● SKU ● Customisations ● Quantity ● Allocated ● Total Totals ● Order Total ● Items ● Shipping

F-ORD/01.5	The system will allow authorised user to add 'Details' to the Order Information (special instructions to the warehouse)
F-ORD/01.6	The system will allow authorised users to mark the order as 'Reviewed' and automatically apply the Internal Review Date and Time
F-ORD/01.7	The system will allow authorised users to view payment transactions of an order. Each transaction will display: ● Date/time paid ● Amount paid ● Provider Tax Id (if applicable) ● Provider Status ● Provider Type Ref (if applicable) ● Provider Customer Ref (if applicable) ● Auth Code ● Address CHECKED/NOTCHECKED ● Postcode CHECKED/NOTCHECKED ● CVV CHECKED/NOTCHECKED
F-ORD/01.8	The system will allow authorised users to view and edit customer details
F-ORD/01.9	The system will allow authorised users to edit the shipping method for package status of 'Not Yet Shipped' ● Available shipping method ● Charge ● Requested Date ● Options (book in required) ● Despatch notes/request
F-ORD/01.10	The system will allow authorised users to update the following on the order line ● SKU ● Quantity ● Total
F-ORD/01.11	If the order is shipped then the system will allow authorised users to view, download, print package document
F-ORD/01.12	The system will allow authorised users to add/remove order lines

F-ORD/01.13	The system will allow authorised users to Recalulate Package which will update the following: • Price - Update to the current price of products • Tax - Update to the current tax rate

F-ORD/02.0	**Top up Payments** Top up payments allows for ad hoc payments to be added to an order for when where a further amount is required
F-ORD/02.0	The system will allow authorised users to make a top up payment to the order by the following methods: ● Account Credit ● BACS Transfer ● Cash ● Email ● External ● Loyalty Points Payment ● Paypal Express ● Prepaid Card ● Sage Pay
F-ORD/02.1	The system will display the top up transaction within Payment Details

F-ORD/03.0	**Refund Payments (Not for returns)** *This allows for a payment to be refunded without affecting the ordering process*
F-ORD/03.1	The system will allow authorised users to apply a refund to an order
F-ORD/03.2	The system will allow authorised users to to enter ● A refund amount ● A Reason (will be sent to the provider)
F-ORD/03.3	The system will display the refunded transaction within Payment Details

F-ORD/04.0	**Cloning Packages** *It is possible to clone a package within an order which is particularly useful when packages get lost in the post or reorders a package over the telephone*
F-ORD/04.1	The system will allow authorised users to clone packages
F-ORD/04.2	The system will remove all shipping and item costs when a package is cloned
F-ORD/04.3	The system will remove any loyalty points gained when a package is cloned
F-ORD/04.4	The system will allow authorised users to edit the following ● SKU (Price will be updated when updated) ● Quantity ● Total Cost
F-ORD/04.5	The system will allow authorised users to add more items to a cloned package
F-ORD/04.6	The system will allow authorised users to view and edit customer details of a cloned package
F-ORD/04.7	The system will allow authorised users to edit the delivery details of a cloned package
F-ORD/04.8	The system will allow authorised users to add the shipping method to a cloned package and update the following ● Charge ● Requested Date ● Options (Book in required) ● Despatch notes/requests
F-ORD/04.9	The system will allow authorised users to Recalculate Package which will update the following: ● Price - Update to the current price of products ● Tax - Update to the current tax rate

3. Confirmation of sign-off

Name:	
Position:	

I confirm I have received this functional specification and give my authorisation to proceed with the development.

Signed: _____

Date: _____