

# Sales Order Management User Stories, Use Cases, and Test Cases

This document describes the process of Omnichannel Order Management from the end-user perspective.

**User:** Order Manager, CSR (Customer Service Representative)

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## Story 1: Create Customer

New customer contacts the CSR for placing an order for the desired product. CSR creates a new customer profile and subsequently place an order for him. CSR adds required information of the customer in the system while creating a new profile. Customer details like First Name, Last Name, Email Address are mandatory while creating a new profile. Customer email address may or may not to be used as user login Id. The customer uses given login Id in future if he wants to place an order himself through the storefront. Given profile information can be edited any number of times by the CSR if the customer requests for it. Most of the time the customer creation and order placement need to be done at the same time, thus CSR also optionally adds the shipping address and Credit Card(s) details in the system after the customer profile has been created.

## Story 2: Find Customer

If any existing customer contacts the user through any channel(Phone, Email, IM), the user locates existing customer profile by name, phone and/or email, user id.

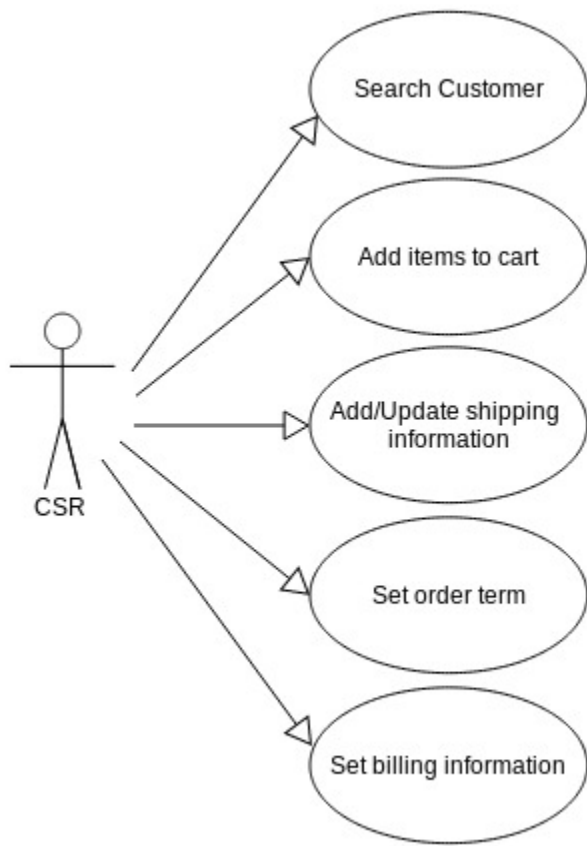
## Story 3: Edit Customer

As needed mostly requested by the customer, a user adds/updates the details on a customer profile e.g. Name, Email, Shipping Address, and Payment Information.

## Story 4: Create/Place A New Order

For placing an order, the CSR searches the customer either through entering First Name, Last Name or customer Id of the customer. Then being continued CSR would select the sales channel, enter order name and other details. While placing an order, the customer specifies product information like product name with its feature to CSR through phone, email or fax. CSR adds desired products into the order specifying the quantity requested. CSR can also apply the promotions and other adjustments based on the combination of items. CSR would have one or more options for finalizing order. He/she can quick finalize the order, finalize order with default options or can simply continue with finalize order link. If the shipping information are available in the system then it is available on CSR screen, and if it is not then CSR adds it. After selecting shipping information, CSR selects the shipping method available in the system. CSR is able to ship the order in multiple batches in case of any item is not available in the inventory, for this CSR splits shipment of the order. CSR can gift wrap the product if desired by the customer also he/she can add instructions for the shipping carrier. Once the order has been finalized, CSR sets order terms. CSR should have multiple payment options while creating the order as per requested by customer. In case of payment through credit card, CSR does not need to enter the CVV number for making payment through credit card. It will be an optional field. At any point of time the order can be cleared/removed from the system if the customer declines to go ahead with the order placement.

**Use Case:**



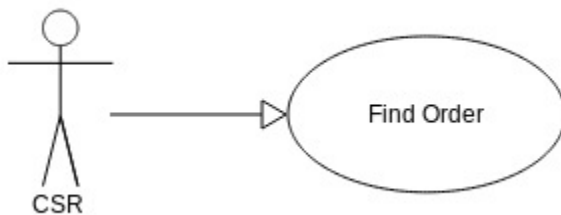
<b>Use Case Name</b>	Place A New Order
<b>Actor</b>	CSR
<b>Description</b>	CSR places an order on behalf of customer.
<b>Trigger</b>	The CSR accesses the order application.
<b>Precondition</b>	Customer exists who has requested to place order.
<b>Basic Path</b>	<ol style="list-style-type: none"> <li>1. User chooses the 'Order Entry' menu item.</li> <li>2. User selects the sales channels.</li> <li>3. User enters the customer's name or id.</li> <li>4. User clicks on continue link.</li> <li>5. User enters the order name and other information and clicks on continue link.</li> <li>6. User will be navigate to Create Sales Order page.</li> <li>7. User enters the product id/product name and desired quantity in respective fields.</li> <li>8. User clicks on [Add To Order] button.</li> <li>9. System adds the desired product into the cart.</li> <li>10. User applies the Promotion/Coupon code if available.</li> <li>11. Being continued,user clicks on Finalize Order link.</li> <li>12. User adds/updates shipping information.</li> <li>13. User selects the shipping method for the order.</li> <li>14. User can enters order term type description.</li> <li>15. User enters the payment methods and can adds/updates credit card details.</li> <li>16. User can optionally select to gift wrap the ordered products.</li> <li>17. The system displays the total amount due for the customer against the order being placed.</li> <li>18. User clicks 'Create Order' link and order will be created in 'Approved' status.</li> </ol>
<b>Alternative Path 1</b>	After step 9 user can select the order items and remove them from the shopping list by clicking on 'Remove Selected' link.
<b>Alternative Path 2</b>	After step 9 user can clear all the information added in the order, by clicking on 'Clear Order' link. User will be navigated to order entry page again.

<b>Alternative Path 3</b>	<p>After step 3, if the customer is not found then User can go to quick lookup section for finding party.</p> <ol style="list-style-type: none"> <li>1. User clicks on quick lookup button.</li> <li>2. User sees the Quick lookup section and enters the criteria for party.</li> <li>3. User clicks on [Find] button.</li> <li>4. System finds the desired party.</li> <li>5. User selects the desired party for placing the order.</li> </ol>
<b>Alternative Path 4</b>	<p>After step 9 user can click on 'Finalize Order With Default Options' link so that the order will be finalized with default values of customer.</p> <ol style="list-style-type: none"> <li>1. User can add order term type description.</li> <li>2. User enters the payment methods and can adds/updates credit card details.</li> <li>3. System navigates user to Order confirmation page, where user can finally place the order.</li> </ol>
<b>Alternative Path 5</b>	<p>After step 9 user can click on 'Quick Finalize Order' link so that user can fill all the information in one page quickly.</p> <ol style="list-style-type: none"> <li>1. User adds/updates the shipping information in first section.</li> <li>2. User select the shipping method in second section.</li> <li>3. User can enter special instructions and gift card message if he/she has requirement to do so.</li> <li>4. User select the payment method and adds/updates credit card information in third section.</li> <li>5. User can opt for splitting the payment as well.</li> <li>6. User clicks on [Continue to Final Order Review] button.</li> <li>7. User will navigate to Order Confirmation page, where user can finally place the order.</li> </ol>
<b>Post-condition</b>	User is able to place order for the customer.

## Story 5: Find Order

CSR searches for orders with different criteria like status or sales channel or date of the order and gets desired ordered.

**Use Case:**



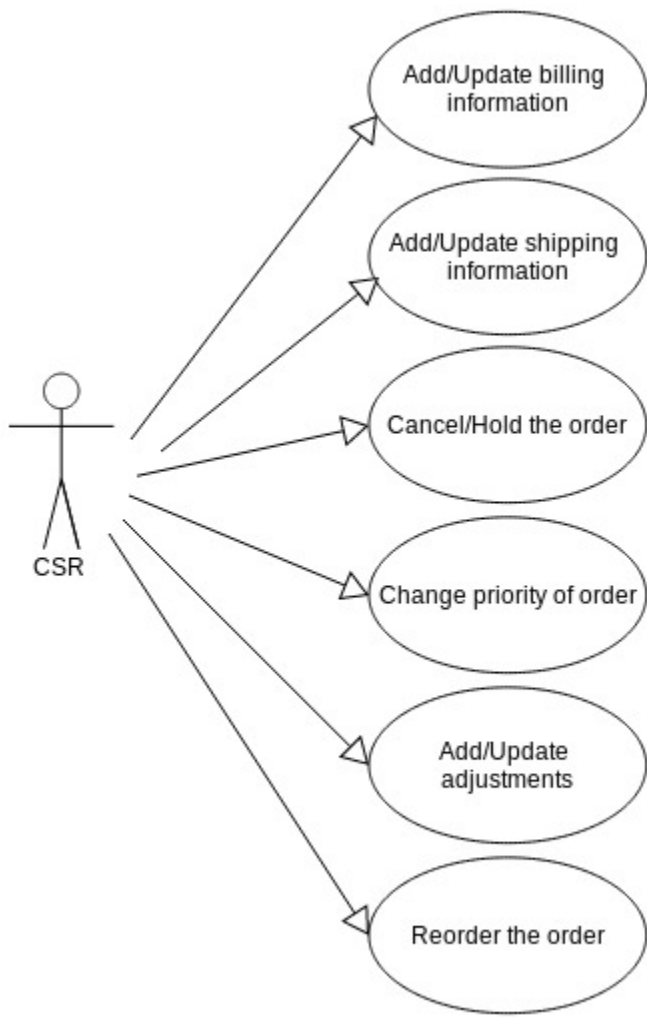
<b>Use Case Name</b>	Find Order
<b>Actor</b>	CSR
<b>Description</b>	CSR searching the order placed.
<b>Trigger</b>	User searches order.
<b>Precondition</b>	CSR has already accessed the CS application.
<b>Basic path</b>	<ol style="list-style-type: none"> <li>1. System displays the find search page.</li> <li>2. User clicks on [Find] button.</li> <li>3. System displays default order list.</li> <li>4. User enters order Id in search field and click on [Find] button.</li> <li>5. System displays searched order in result section.</li> <li>6. User enters party Id in search field and click on [Find] button.</li> <li>7. System displays respective customer orders in result section.</li> <li>8. User selects any status from status drop down.</li> <li>9. System displays order list according to selected status.</li> <li>10. User selects desired sales channel from Sales channel dropdown.</li> <li>11. System displays order list related to selected sales channel.</li> <li>12. User enter date range in date filter and click on [Find] button.</li> <li>13. System displays the orders as per date range.</li> <li>14. User can select any criteria displayed inform.</li> <li>15. System displays orders accordingly.</li> </ol>

<b>Post-condition</b>	Orders list is successfully displayed.
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### Story 6: Edit Order

After the order has been finalized, CSR can update payment method, payment details, shipping address and shipping method. CSR can also cancel the order, put order on hold, change priority of order, manually send a confirmation to customer, put order notes, add/edit adjustments on request by the customer before the order has been moved to warehouse for fulfilment. CSR can create a new order(repeat order) with same details for same customer through user will not have access to order history while edit the order.

**Use Case:**



<b>Use Case Name</b>	Edit Order
<b>Actor</b>	CSR
<b>Description</b>	CSR can Add/Edit the shipping information, reorder and cancel the order.
<b>Trigger</b>	CSR accesses the CS application
<b>Precondition</b>	Order for editing is present in the system.

<b>Basic Path</b>	<ol style="list-style-type: none"> <li>1. User chooses 'Order List' menu.</li> <li>2. User finds the desired order, clicks on the order id link and navigates to the order page.</li> <li>3. User changes the priority for the order.</li> <li>4. User adds/updates the shipping information of the order.</li> <li>5. User authorizes and captures the payment for the order.</li> <li>6. User can cancel existing payments and can add new payments(Offline/Credit Card).</li> <li>7. User adds notes for the order.</li> <li>8. User sends a confirmation email to the customer's email address.</li> <li>9. User can create the same order as a new order.</li> <li>10. User can also sees the return link if order has any return.</li> <li>11. User can Edit items by clicking [Edit Items] button.</li> <li>12. User can update quantity of items and can also add new items in the shopping list.</li> </ol>
<b>Alternative Path 1</b>	After step 2, User can cancel/hold the order.
<b>Post-condition</b>	User is able to update the existing order.

### Story 7: Return Order

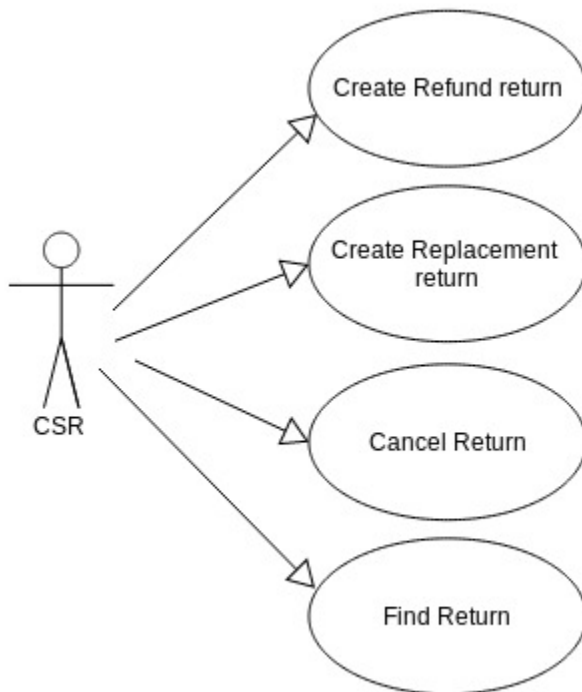
In case, the customer finds the shipped product to be faulty or if the customer decides that he/she does not want the shipped product, they contact the CSR by phone or email and request for return. Customer specifies reason for return (and optionally a note explaining the reason for return), and desired return response (Refund, Replacement). There are different kind of return responses available with us:

a) Refund: If customer does not want the received item, he/she chooses for 'Refund'. In case of refund, once merchant receives the returned item, merchant will refund the amount charged for returned items. Refund can be made either online or by check.

b) Replacement: In case of a mis-shipped or defective item, the customer opts for a replacement. Customer has to ship items back to the merchant, and the merchant in return ships new items of the same types.

CSR can also cancel the return or can cancel one or more item out of multiple items needs to be cancelled as been requested by the customer. If the original placed order's item(s) is/are flagged as not returnable or received returned item is damaged in case of replacement) then CSR explains return policy to the customer. CSR can approve or reject return request. CSR needs to authorize the return, details of other miscellaneous adjustments applied should be available to be conveyed to customer. For every return requested by the customer irrespective of whether it gets accepted or rejected in future, there is a unique return id. CSR can optionally generate and email electronic shipping label of carrier to the customer, which customer uses to ship the return product(s). Once response with respect to each return are taken (refund or replacement), return will be marked completed.

**Use Case:**



<b>Use Case Name</b>	Return Order
<b>Actor</b>	CSR

<b>Description</b>	CSR performs Returns, Refunds and Replace the order.
<b>Trigger</b>	CSR accesses the CS application
<b>Precondition</b>	The order is in completed status.
<b>Basic Path</b>	<ol style="list-style-type: none"> <li>1. User opens any completed order which he/she want to create return of.</li> <li>2. User clicks on [Create Return] button.</li> <li>3. The system displays the list of order items and other payment/adjustment components.</li> <li>4. User selects the items and components which need to be returned.</li> <li>5. User can select the items return type(Refund/Replacement), return reason and return quantity and can calculate the return.</li> <li>6. User clicks on [Return Selected Items] button. The return will get created in the system.</li> <li>7. User accepts the return and sends a confirmation email to customer.</li> <li>8. User will be able to see the return order link if return has any replacement item.</li> </ol>
<b>Alternative Path 2</b>	After step 7,usercan choose to cancel or reject the return.
<b>Post-condition</b>	User is able to create a return order.