



JUNE 8, 2020

VISIONET

EASYTRACK SETUP
CONFIGURATION DOCUMENT

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Document Overview

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Doc #		Doc Date	June 8, 2020
Author	Ali Asad Akhtar	Last Save	June 26, 2020
Description			

Revision History

Ver #	Rev Date	Author	Distr Date	Brief Description
1.1	6/26	Muhammad Raza Javed	6/26/2020	

Distribution List

Approved By

Name	Role	Version

1. Background

There has been an increase in online shopping due to the recent Coronavirus (COVID-19) pandemic. Majority of customers are now preferring to order online and have it delivered to their locations instead of going out to the retail stores. To cater to the need of effective shipment tracking, Narvar integration is required.

In order to fully integrate the feature, some customization is required in Dynamics 365 commerce HQ that will map the retailer and shipment methods used in Dynamics 365 Commerce with the ones used by Narvar to generate tracking URLs and display them on the store front.

This document details the technical design of Visionet's effective solution for retrieving shipment tracking information using Narvar called EasyTrack.

2. Configurations

2.1 Overview

The configuration document involves the following components:

- Addition of retailer name, carrier information, shipment codes and description used by Narvar against the retailer
- Association of Narvar retailer shipment codes with Dynamics 365 Commerce mode of deliveries used by the e-commerce store and back-office
- Tracking URL builder and association to packing slip
- A regenerate tracking URL button on the packing slip
- Displaying Narvar tracking information on the Dynamics 365 e-commerce order details screen
- Display Narvar tracking information on the Dynamics 365 packing slip email which will be sent to customer

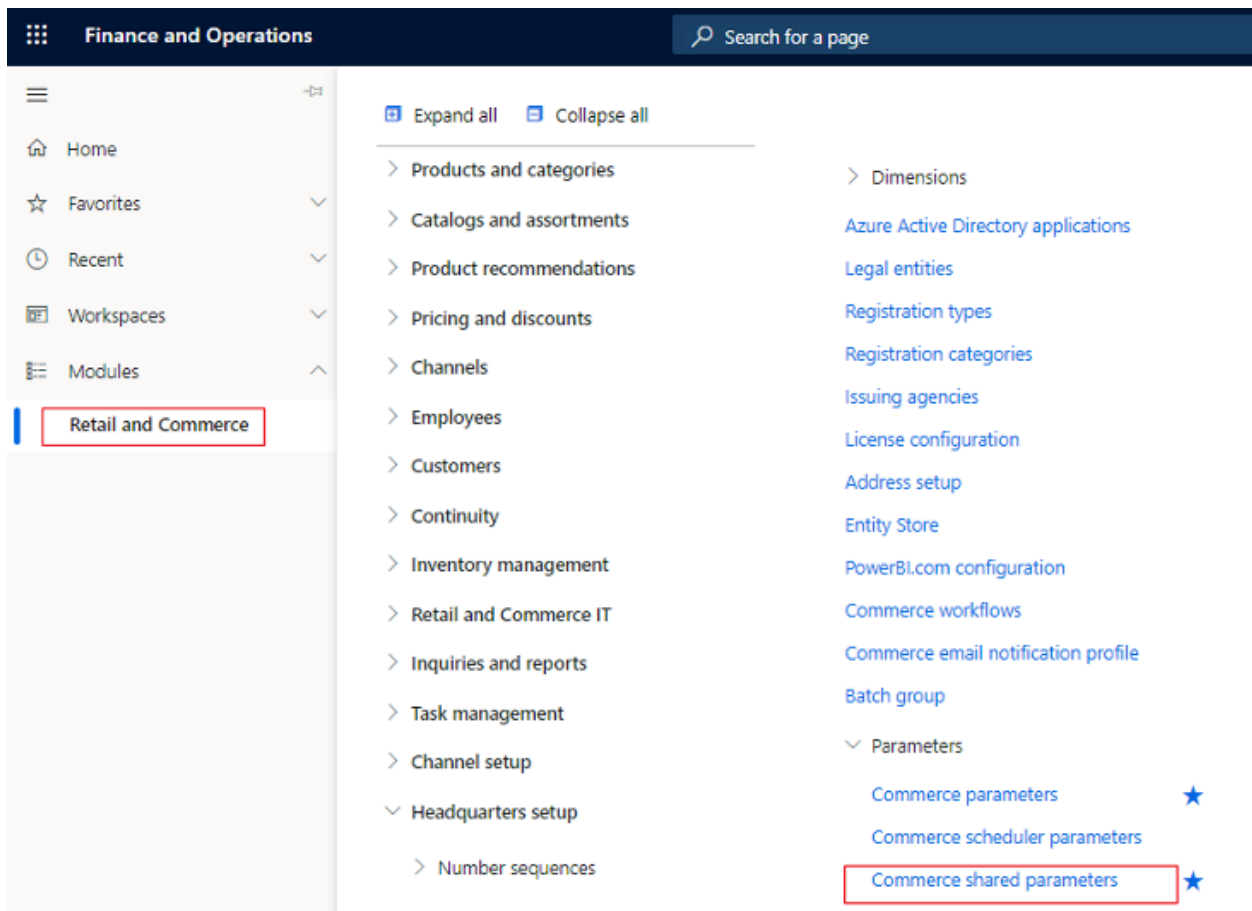
2.2 Retailer name and carrier information

A new tab titled Narvar will be added on Microsoft Dynamics 365 Commerce's commerce shared parameters screen. This will house all configuration related to Narvar tracking that are not legal entity specific.

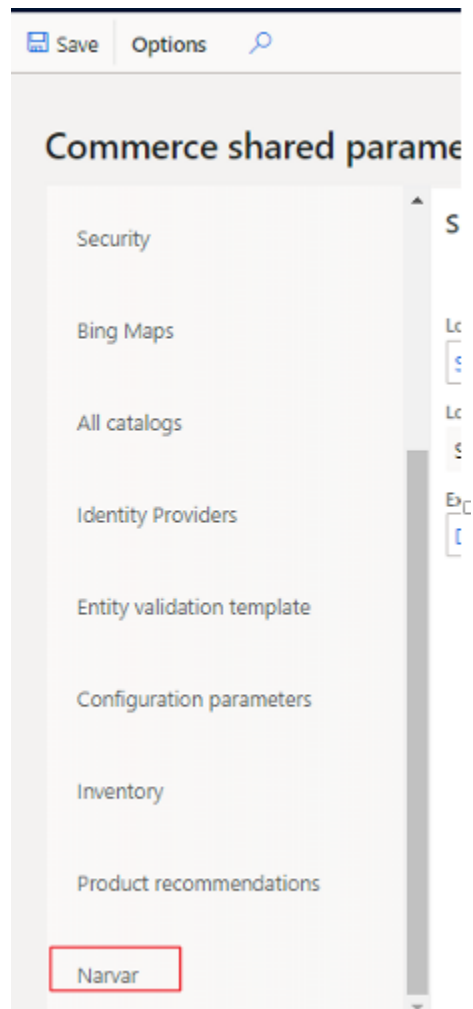
Screen name: Commerce shared parameters

Navigation path: Retail and Commerce > Headquarters setup > Parameters > Commerce shared parameters

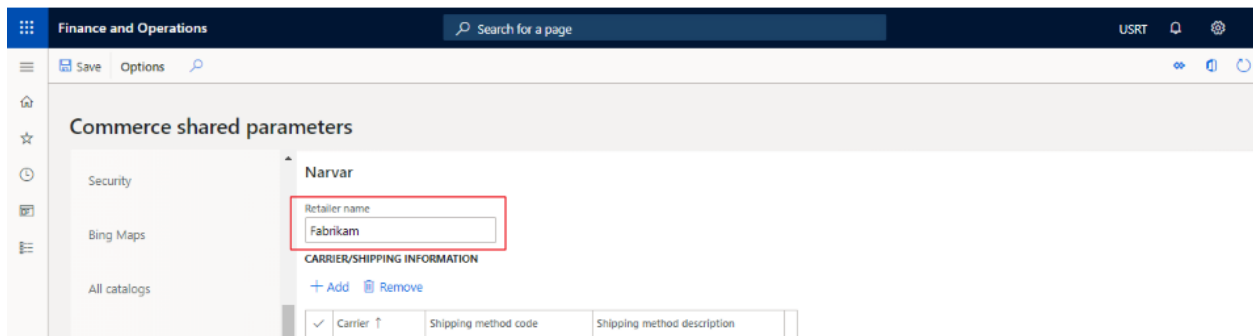
1. Open Microsoft Dynamics 365 commerce backoffice
2. Navigate to Module > Retail and Commerce > Headquarters setup > Parameters > Commerce shared parameters



3. Click on the Narvar tab



4. Enter retailer name in the field. This is the name which has been registered with Narvar. If you are unsure about what to enter, please consult your Narvar documentation.



5. The carrier/shipping information to be associated with retailer is also provided by Narvar. If you are unsure about what to enter, please consult your Narvar documentation.
6. In order to enter the carrier/shipping information, click on “Add” button and provide
 - a. Carrier
 - b. Shipping method code
 - c. Shipping method description

Finance and Operations

Search for a page

USRT

Save Options

Commerce shared parameters

Security

Bing Maps

All catalogs

Identity Providers

Narvar

Retailer name

Fabrikam

CARRIER/SHIPPING INFORMATION

+ Add - Remove

✓	Carrier ↑	Shipping method code	Shipping method description

7. You can add as many carrier/shipping information as required
8. Once information is entered, press Save button

Finance and Operations

Search for a page

USRT

Save Options

Commerce shared parameters

Security

Bing Maps

All catalogs

Identity Providers

Narvar

Retailer name

Fabrikam

CARRIER/SHIPPING INFORMATION

+ Add - Remove

✓	Carrier ↑	Shipping method code	Shipping method description
	FEDEX	FG	Ground

9. In order to remove carrier/shipping information, select a record and click on remove button. *Note: If a carrier/shipping information is associated to Microsoft Dynamics 365 Commerce mode of delivery, it cannot be removed till the association is unlinked.*

2.3 Current Narvar carrier info and shipping codes

Carrier	Shipping Method Code	Shipping Method Description
UPS	UG	Standard
UPS	SP	SurePost
UPS	MI	Mail Innovations
UPS	E3	3 Day Select
UPS	E2	2 Day Air
UPS	E1	Next Day Air
FEDEX	FG	Ground
FEDEX	HD	Home Delivery
FEDEX	SP	SmartPost
FEDEX	E3	3 Day Select
FEDEX	E2	2 Day Air
FEDEX	E1	Next Day Air
USPS	FC	First Class Mail
USPS	SP	Standard Post
USPS	E2	Priority – 2-3 Day
USPS	E1	Express – Next Day

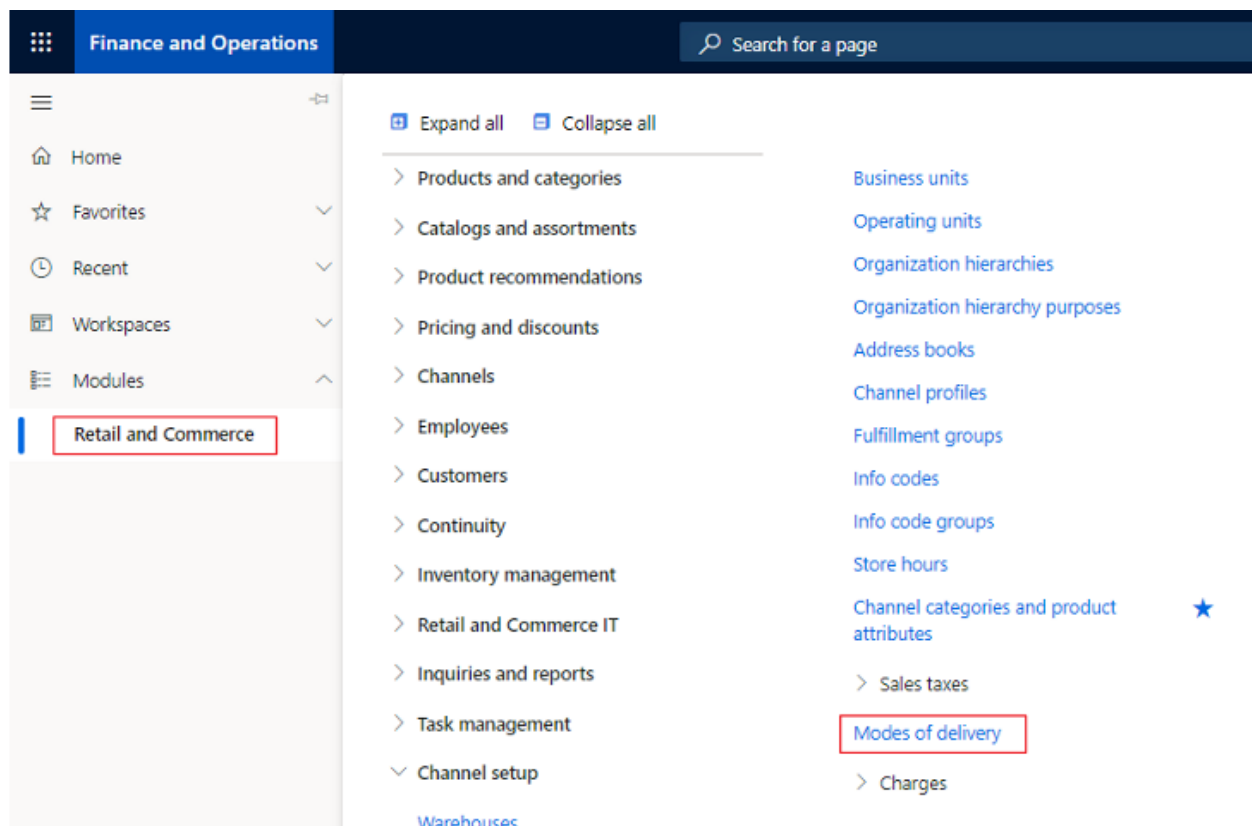
2.4 Mode of delivery's association with Narvar shipping codes

In order to properly have the Narvar tracking URL, the shipping methods used in the online e-commerce stores are to be mapped to the Narvar carrier/shipping information. Once the Narvar info has been entered in the Dynamics 365 Commerce, it will be associated to the online store's mode of delivery.

Screen name: Mode of delivery

Navigation path: Module > Retail and Commerce > Channel setup > Modes of delivery

1. Open Microsoft Dynamics 365 commerce backoffice
2. Navigate to Module > Retail and Commerce > Channel setup > Modes of delivery



3. Select the mode of delivery which needs to be used for Narvar tracking

Finance and Operations | mode of delivery | USRT

Save + New Delete Translations External codes Options

Filter

50 Parcel

60 Customer pickup

70 Customer carry out

99 Standard

Modes of delivery

Mode of delivery	Description	Charges group	Expedite	Carrier	Shipping method code
99	Standard	01			

Retail channels

Add line Remove

✓	Name	Party ID
	Electronics	000000355
	Sporting	000000356
	Fashion	000001569
	San Francisco	000002230
	Fabrikam extended online store	000002231

4. From the carrier dropdown, select the carrier

5. From the shipping method dropdown, select the shipping code for the carrier

6. Save the information

Finance and Operations | Search for a page | USRT

Edit + New Delete Translations External codes Options

99

99 Standard

Modes of delivery

Mode of delivery	Description	Charges group	Expedite	Carrier	Shipping method code
99	Standard	01		FEDEX	US

Retail channels

Add line Remove

Note: Mode of delivery has a 1-1 relationship with carrier and shipping code.

2.5 Email configuration

In order to have the tracking information display on email sent to customers on packing slip posting, the following configuration needs to be in place. If any Microsoft Dynamics 365 Commerce customer has already setup email, then only the trigger and template needs to be added.

Visionet Systems Inc. will provide the HTML template as per client branding guidelines.

Email parameters

1. Navigate to Module > Headquarters setup > Parameters > Email parameters
2. In the configuration tab
 - a. Select the batch email provider. This could be Exchange or SMTP
 - b. Select the interactive email providers
 - c. Save the information
3. In the SMTP settings tab
 - a. Provide the outgoing mail server
 - b. Provide the SMTP port number
 - c. Provide the username (email address which will be used to send emails)
 - d. Provide password (password of the provided email address)
 - e. Select Yes on SSL required toggle
 - f. Save the information
 - g. You can test the configuration by sending test mail from Test mail tab

Commerce Email Notification Profile

1. Navigate to Module > Headquarters setup> Commerce email notification profile
2. Select the email profile which is attached to your online store
3. Select the email template from the Email ID drop-down list. In our case it would be PackOrder
4. Select the appropriate Email notification type from the drop-down list. In our case it would be Packing completed
5. Select the Active check box.
6. On the action pane, select Save.

Email synchronization job

1. In order to make sure that emails are sent, the email synchronization job has to be set on recurrence or executed on demand

2.6 Show order tracking on e-comm order history

The order tracking information is shown on order details screen by default. This can also be shown on the order history page as well, if required. This is handled through a configuration flag on the Dynamics 365 CMS site builder.

1. Open the Dynamics 365 Commerce site builder
2. Open the relevant site from the main screen
3. Click on pages and search for order history page
4. Find and select order history module
5. On the right pane, scroll down till the “Show tracking image and number” flag is displayed
6. Click on edit button to edit the record
7. If the flag is checked, then tracking info is displayed on order history
8. After setting flag, click on finish editing button and publish website
9. Scroll to order history page on e-commerce site
10. The tracking info of packing slip is displayed

3. Order Flows

Following are the scenarios and their details which are covered under the NARVAR integration scope.

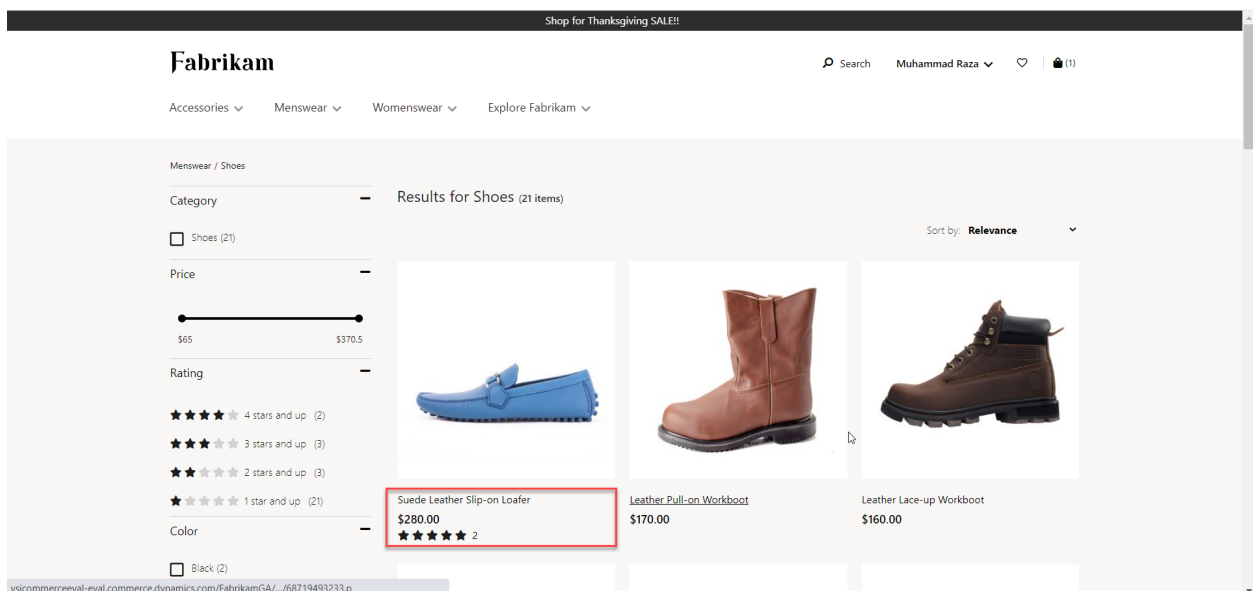
3.1 Complete order delivery

3.1.1. Scenario Details

Customer places an order on Online Ecommerce Store and complete order is fulfilled by the warehouse. Order tracking details are generated successfully and are then displayed on the online Ecommerce Store on Order History and Order Details page.

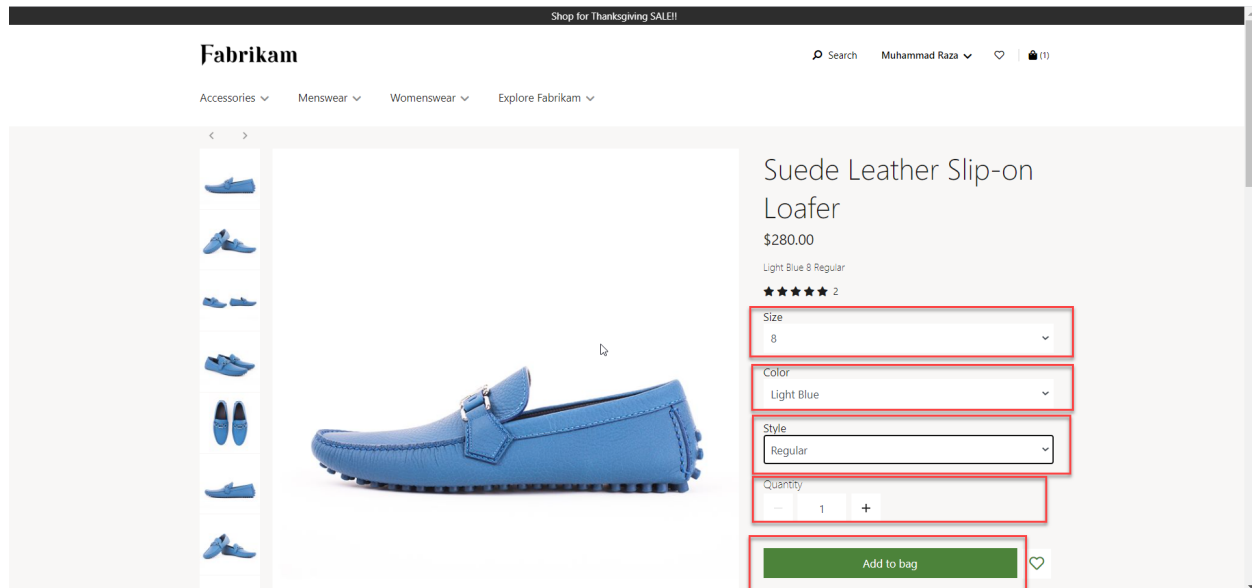
3.1.2. Detail Steps

1. Go to Online Ecommerce store and select Item(s) which are to be added in the cart.

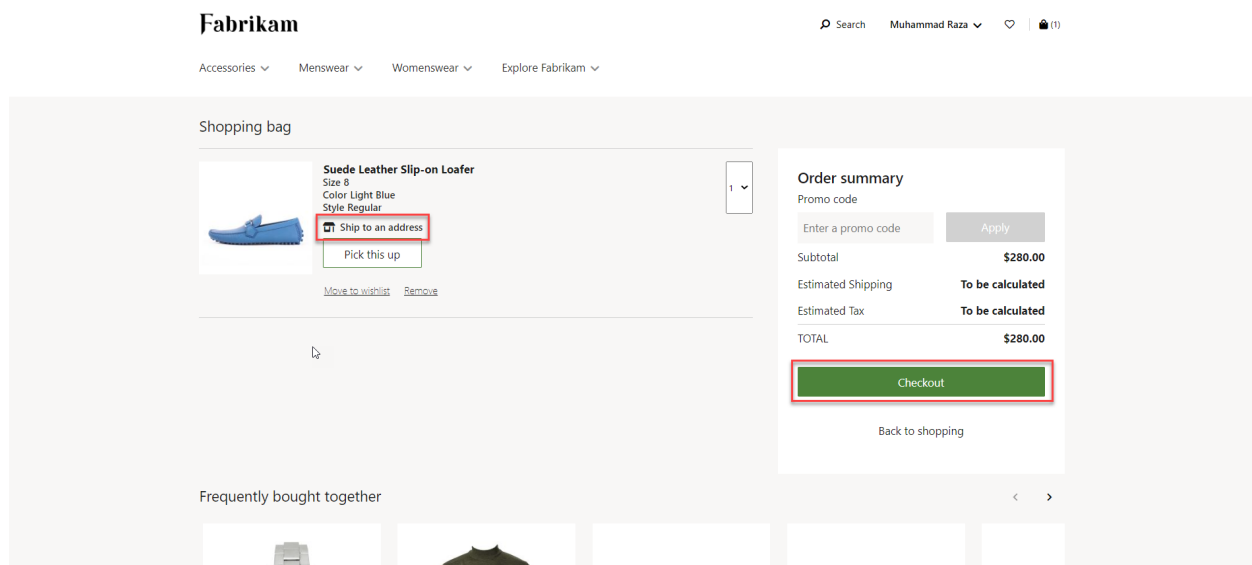


2. Now, select the variant (size, color, style etc) and the Quantity as per need.

3. Click 'Add to bag' button.



4. System will now navigate to 'Shopping bag' page where the user can select whether the selected items should be delivered to an address or will be picked up in store.
5. Select 'Ship to Store' option and then click 'Checkout'.



6. User will now be routed to the Checkout page where following details need to be entered to complete the order:
 - a. Shipping Address
 - b. Delivery Options
 - c. Payment Information
 - d. Contact Information

Fabrikam Search Muhammad Raza (1)

Accessories ▾ Menswear ▾ Womenswear ▾ Explore Fabrikam ▾

Checkout

1. SHIPPING ADDRESS [Change](#)

Muhammad Raza Javed
c-4 garden view terrace, garden view apartments
east windsor NJ 08520
USA
📞 9175926693

2. DELIVERY OPTION [Change](#)

Standard Free

3. PAYMENT METHOD [Change](#)

Notice: Payment info is for demo purposes only and does not process actual transactions; however, your payment info will be sent to your designated third-party payment provider.

Card information
Muhammad Raza Javed Card ending in 1111 Expires 10/2020

Billing address
Muhammad Raza Javed
c-4 garden view terrace, garden view apartments
east windsor NJ 08520
USA
📞 9175926693

4. CONTACT INFORMATION [Change](#)

shaaka@gmail.com

Order summary

Subtotal	\$280.00
Shipping	Free
Tax	\$18.20
AMOUNT DUE	\$298.20

[Place order](#)

[Back to shopping](#)

[Edit Cart](#)

Shipping (1 item)

Suede Leather Slip-on Loafer
Size 8
Color Light Blue
Style Regular
Quantity 1
\$280.00

- Once the order has been placed, 'Order Confirmation' page will display all important order details.

Shop for Thanksgiving SALE!!

Fabrikam Search Muhammad Raza (0)

Accessories ▾ Menswear ▾ Womenswear ▾ Explore Fabrikam ▾

Order Confirmation

Confirmation ID: 2CD1217SHAAA
Confirmation email sent to shaaka@gmail.com

[Back to shopping](#)

Delivery (1 item)

Muhammad Raza Javed
c-4 garden view terrace, garden view apartments
east windsor, NJ 08520 USA

Suede Leather Slip-on Loafer
Size 8
Color Light Blue
Style Regular

Qty 1 Total: \$280.00

Payment method
VISA card ending in 1111

Order summary

Subtotal	\$280.00
Shipping	FREE
Tax	\$18.20
Total	\$298.20

Customer Service
Contact
FAQ
Delivery & Returns
Privacy Policy
Terms and conditions

Our Stores
Store & Services
Store & Hours
Store events

Store & Support
Your accounts
Your orders
Shipping rates

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f t i

- Scheduled P-0001 Job and Synchronize Orders Job in D365, will pull the order in D365FO back-office and create a sales order for the corresponding Online Web order.
- Navigate to Retail and Commerce->Customers->All Sales Orders to find the sales order.

Finance and Operations

all sales order

USRT

[+ New](#)
[Delete](#)
[Sales order](#)
[Sell](#)
[Manage](#)
[Pick and pack](#)
[Invoice](#)
[Retail](#)
[General](#)
[Options](#)

[New](#)
[Cancel](#)
[Payments](#)
[Copy](#)
[View](#)
[Functions](#)
[Attachments](#)

[Service order](#)
[Purchase order](#)
[Direct delivery](#)

[Totals](#)
[Order credit](#)
[Recap](#)
[Order holds](#)

All sales orders

Filter

✓ Sales order ↑	Customer account	Customer name	Order type	Invoice account	Channel	Status	Release status	Do not process	H...	Sales ta
888986	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
890006	004772	Scott Summers	Sales order	004772	Bazarvoice Online Store	Open order	Open			
890943	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
893003	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
893055	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
893062	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Delivered	Open			
893513	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
894147	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
894822	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
895201	004446	Ahmad Nawaz	Sales order	004446	Bazarvoice Online Store	Open order	Open			
896229	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
897542	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Delivered	Open			
898971	004772	Scott Summers	Sales order	004772	Bazarvoice Online Store	Open order	Open			
899176	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
902327	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
910188	004771	Muhammad Raza Javed	Sales order	004771	Fabrikam extended online store	Delivered	Open			
923931	004771	Muhammad Raza Javed	Sales order	004771	Fabrikam extended online store	Open order	Open			

10. Open the sales order and click on 'Post packing slip' option in 'Pick and pack' tab to post the packing slip.

Finance and Operations

Search for a page

USRT

[Edit](#)
[+ New](#)
[Delete](#)
[Sales order](#)
[Sell](#)
[Manage](#)
[Pick and pack](#)
[Invoice](#)
[Retail](#)
[General](#)
[Options](#)

[Generate](#)
[Post packing slip](#)

[Generate picking list](#)
[Picking list registration](#)
[Intercompany picking list](#)

[Picking list](#)
[Packing slip](#)

Sales order details

923931 : Muhammad Raza Javed

Lines Header Open order

Sales order header

DELIVERY ADDRESS

Name

Muhammad Raza Javed

Delivery address

Muhammad Raza Javed

Address

c-4 garden view terrace, garden view appartments east windsor, NJ 08520 USA

DELIVERY DATE

Requested ship date

6/25/2020

Confirmed ship date

Confirmed receipt date

Requested receipt date

6/25/2020

Simulate delivery dates

WAREHOUSE

Release status

Open

TRANSPORTATION

Routes

DISCOUNTS

Total manual discount percentage

0.00

RETAIL

Loyalty card number

DISTRIBUTED ORDER MANAGEMENT

DOM Status

Not processed

Sales order lines

+ Add line + Add lines Add products Remove Sales order line Financials Inventory Update line Retail

✓ T...	Variant number	Item number	Product name	Quantity	Unit	Delivery type	Adjusted unit p...	Unit price	Discount	Discount percent	Net amount	Adjusted net a...	Di
	VN-006987	92074	Suede Leather Slip-on Loafer / S...	1.00	ea	Stock	0.00000	280.00			280.00	0.00	

11. Enter tracking number in tracking info section and save it.

12. Verify all the packing slip values and update quantities on the lines and then hit 'OK' to post the packing slip.

Packing slip posting

Arrange Select Printer setup

PARAMETER

Quantity: All

Reduce quantity: No

PRINT OPTIONS

Print: Current

Print packing slip: No

Print shipping labels: No

SETUP

Check credit limit: None

SUMMARY ORDER

Summary update for: None

Overview

Setup

Lines

Test	Sales order	Item number	Update	Net amount	Close	Mode of delivery	Delivery name
✓	Pure comfort for your feet	923931	92074	1.00	280.00	99	Muhammad Raza Javed

OK Cancel Batch

13. Posting of the packing slip successfully will trigger the NARVAR integration and generate the tracking information for the order. Which can be seen by clicking the 'Order History' option in the Account section of the online web store.

14. Tracking number and delivery related details can displayed on both 'Order history' page as well as on 'Order Details' page.

Shop for Thanksgiving SALE!!

Fabrikam

Accessories Menswear Womenswear Explore Fabrikam

Confirmation ID: C7A18BESHAAA
Order# 910188 | 6/25/2020 | 1 item | \$298.20

DELIVERY
MUHAMMAD RAZA JAVED
C-4 GARDEN VIEW TERRACE, GARDEN VIEW APARTMENTS EAST WINDSOR, NJ 08520 USA

Shipment 1 of 1
Tracking Number: 23522352

Estimated Delivery
Friday
26
ready to go

Suede Leather Slip-on Loafer
Size 8
Color Light Blue
Style Regular

Total: \$280.00
Qty (ordered): 1
Qty (shipped): 1

Shipped BUY IT AGAIN

Subtotal \$280.00
Shipping FREE
Tax \$18.20
Total \$298.20

Payment method
VISA card ending in 1111

Need help?
Call 000-000-0000

15. By clicking on the tracking number, details about the order shipment and delivery can be seen in a saperate window.

Estimated Delivery

- Ordered
Wed, June 17
- Shipped
Wed, June 18
Your order is shipped
- Estimated Delivery
Wed, June 22

[SHOW SHIPMENT DETAILS](#)

Delivery Notification

Get text updates about you delivery



Mobile Number

[SIGN UP](#)

Or get updates via facebook

Help Us Improve

Rate Your Shipping Experience



See What's New!



[SHOP THE LATEST](#)

SAVE UPTO \$25*

On accessories and more



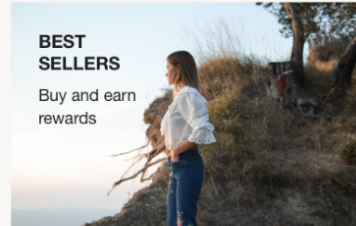
SAVINGS SHOWCASE

Clearance, rollbacks and special buys



BEST SELLERS

Buy and earn rewards



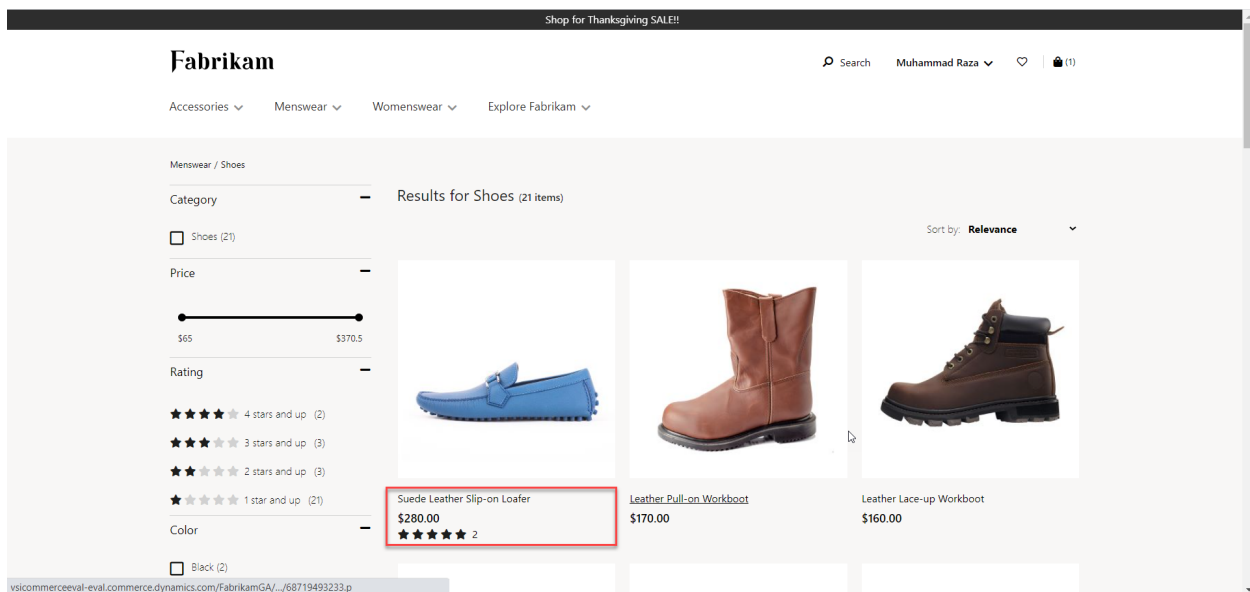
3.2 Complete store pick-up

3.2.1. Scenario Details

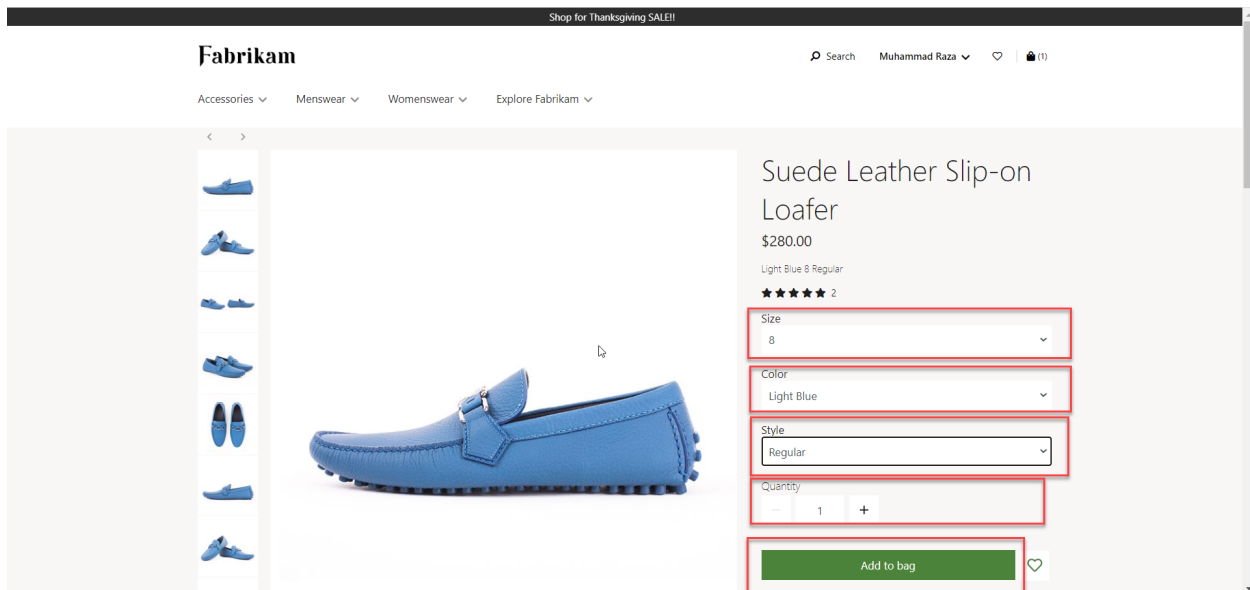
Customer places an order on Online Ecommerce Store to be picked up from store and complete order is fulfilled by the store. According to the business cases, order tracking will not be supported for orders which are for in-store pickup.

3.2.2. Detail Steps

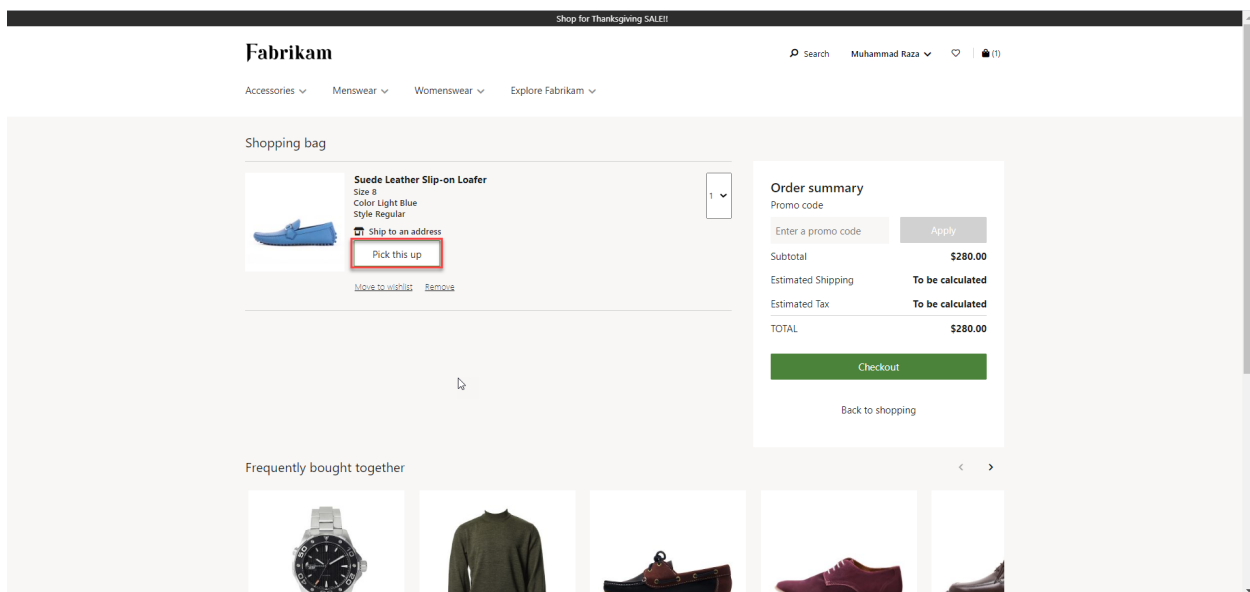
1. Go to Online Ecommerce store and select Item(s) which are to be added in the cart.



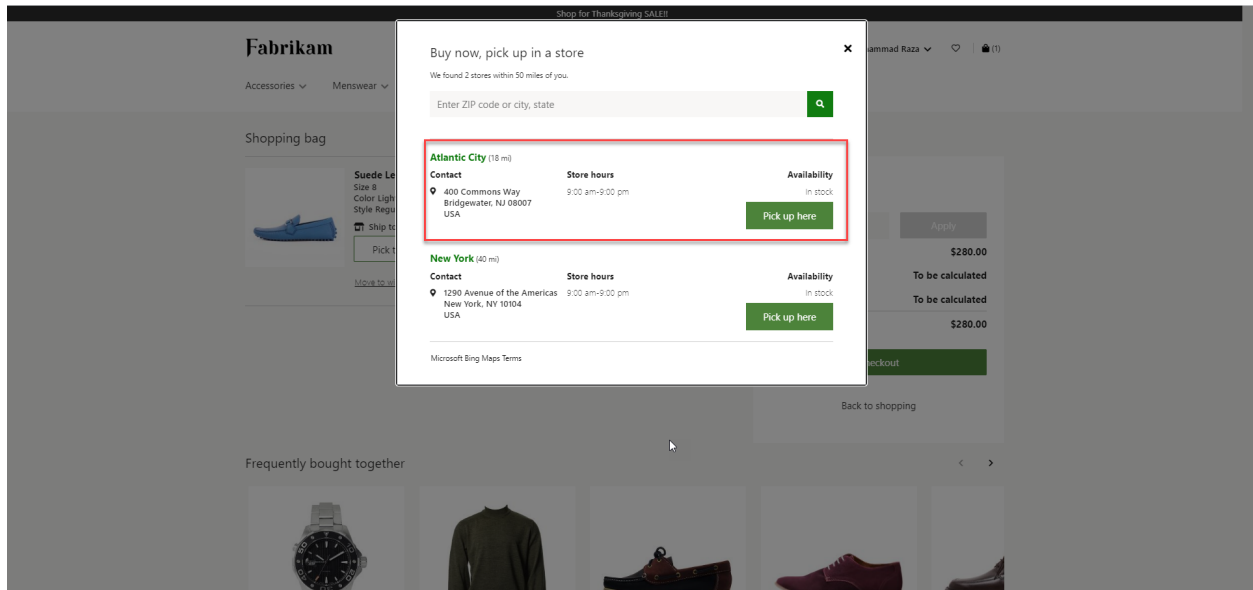
2. Now, select the variant (size, color, style etc) and the Quantity as per need.
3. Click 'Add to bag' button.



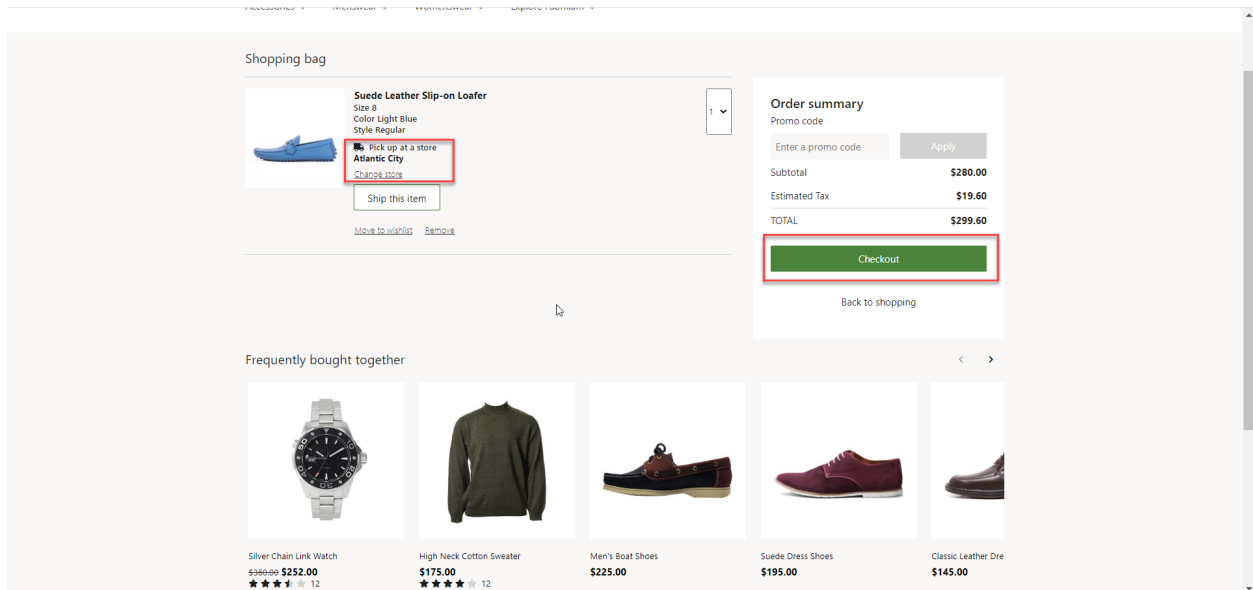
4. System will now navigate to 'Shopping bag' page where the user can select whether the selected items should be delivered to an address or will be picked up in store.
5. Select 'Pick this up' option.



6. Once 'Pick this up' option is selected, user will be prompted to select a store as per his current location. The prompt will also show if the selected item is in stock or not.



- Once this option is selected the Shopping Bag will now display the store as a Pick up location. Then click 'Checkout' option.



- Now enter the payment details and contact details and click on 'Place Order'

Shop for Thanksgiving SALE!!

Fabrikam Search Muhammad Raza (1)

Accessories ▾ Menswear ▾ Womenswear ▾ Explore Fabrikam ▾

Checkout

1. PAYMENT METHOD

[Change](#)

Notice: Payment info is for demo purposes only and does not process actual transactions; however, your payment info will be sent to your designated third-party payment provider.

Card information

Muhammad Raza Javed Card ending in 1111 Expires 10/2020

Billing address

Muhammad Raza Javed
c-4 garden view terrace, garden view apartments
east windsor NJ 08520
USA
📞 9175926693

2. CONTACT INFORMATION

[Change](#)

shaaka@gmail.com

[Back to shopping](#) [Place order](#)

Order summary

Subtotal	\$280.00
Tax	\$19.60
AMOUNT DUE	\$299.60

[Place order](#)

[Back to shopping](#)

[In-store pickup \(1 item\)](#) [Edit Cart](#)

Suede Leather Slip-on Loafer

Size 8
Color Light Blue
Style Regular
Quantity 1
\$280.00

[Pick up at a store](#)
Atlantic City

- Scheduled P-0001 Job and Synchronize Orders Job in D365, will pull the order in D365FO back-office and create a sales order for the corresponding Online Web order.
- Once the customer goes to Pick up the items at the store and the store associate Picks and packs the item, following status change will take place on online web store.

Shop for Thanksgiving SALE!!

Fabrikam Search Muhammad Raza (0)

Accessories ▾ Menswear ▾ Womenswear ▾ Explore Fabrikam ▾

[Dashboard](#) / [Order History](#) / Order Detail

Confirmation ID: E965C7ASHAAAA
Order# 991531 | 6/26/2020 | 1 item | \$299.60

STORE PICKUP

Pick Up 1 of 1



Suede Leather Slip-on Loafer
Size 8
Color Light Blue
Style Regular

Total: \$280.00
Qty 1

[Ready for pickup](#) [BUY IT AGAIN](#)

Subtotal	\$280.00	Payment method	VISA card ending in 1111
Shipping	FREE		
Tax	\$19.60		
Total	\$299.60		

[Need help?](#)
Call 000-000-0000

Customer Service Our Stores Store & Support Follow us

- As soon as the order is finalized in-store the 'Ready to pickup' status will change to 'Picked Up'

Shop for Thanksgiving SALE!!

Fabrikam

Search

Muhammad Raza

Accessories

Menswear

Womenswear

Explore Fabrikam

Dashboard / Order History / Order Detail

Confirmation ID: E965CTASHAAA
Order# 991531 | 6/26/2020 | 1 item | \$299.60

STORE PICKUP

Pick Up 1 of 1



Suede Leather Slip-on Loafer
Size 8
Color Light Blue
Style Regular

Total: \$280.00
Qty 1

Picked up

BUY IT AGAIN

Subtotal

\$280.00

Payment method

VISA card ending in 1111

Shipping

FREE

Tax

\$19.60

Total

\$299.60

Need help?

Call 000-000-0000

Customer Service

Our Stores

Store & Support

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22 | Page

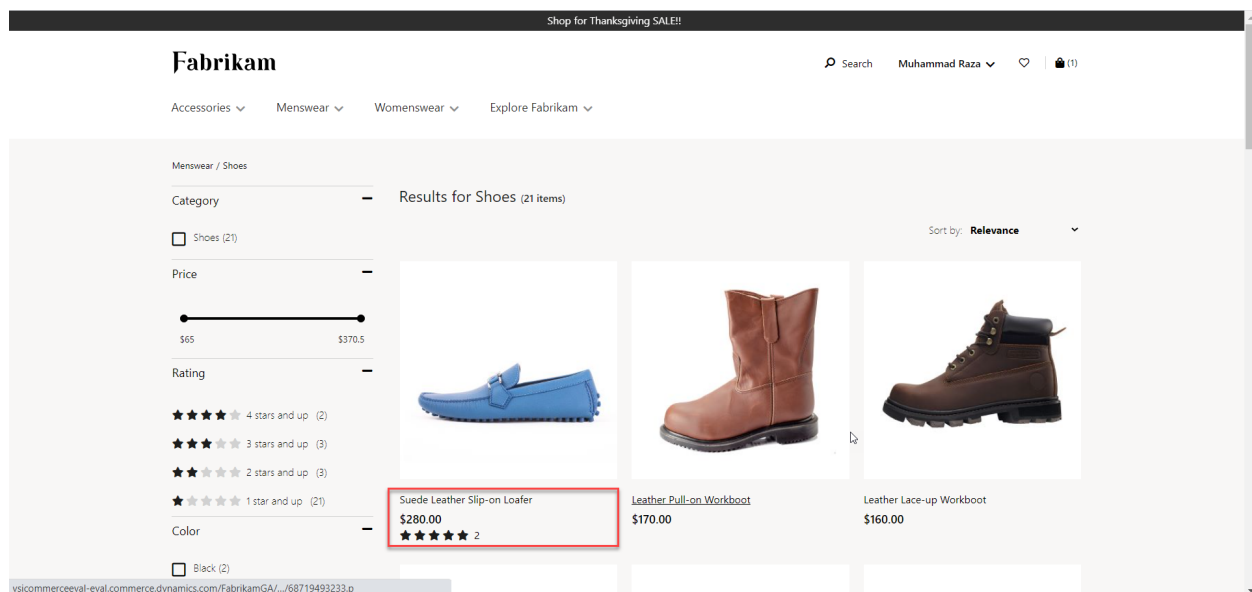
3.3 Partial order delivery

3.3.1. Scenario Details

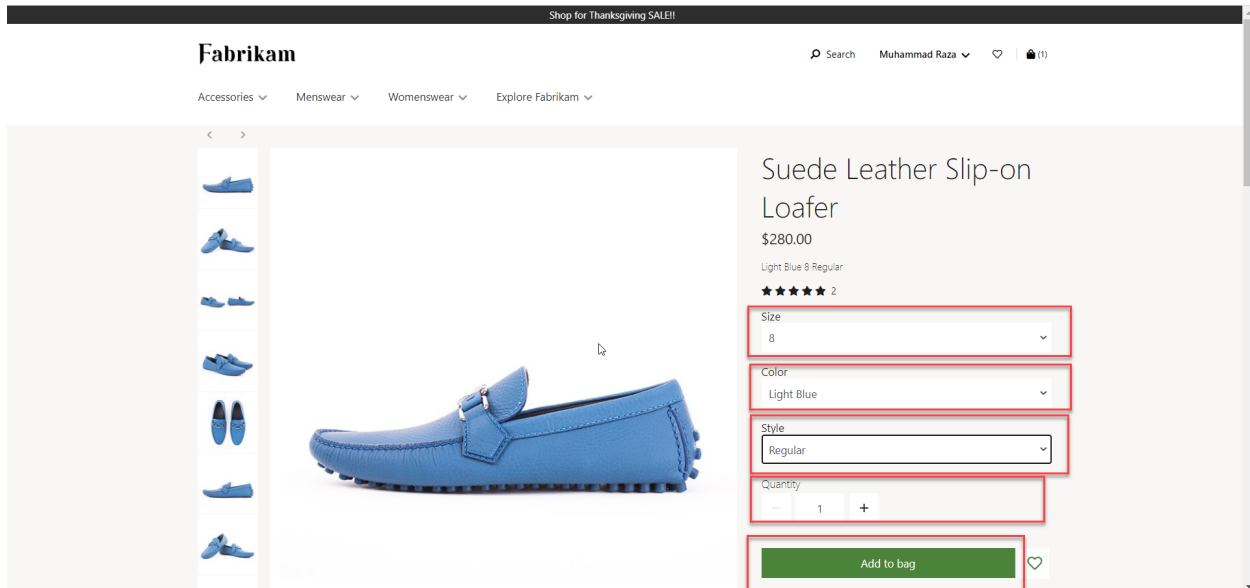
Customer places an order on Online Ecommerce Store and partial order is fulfilled by the warehouse, because of item back-ordering. Order tracking details are generated successfully for the items which are being fulfilled and are then displayed on the online Ecommerce Store on Order History and Order Details page.

3.3.2. Detail Steps

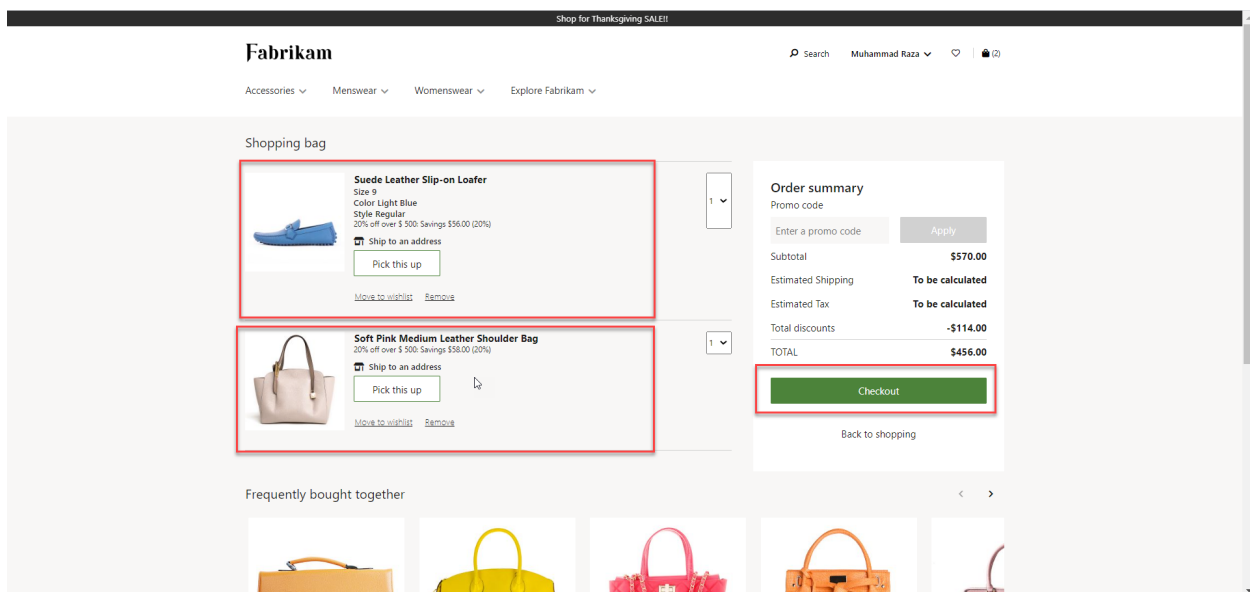
1. Go to Online Ecommerce store and select Item(s) which are to be added in the cart.



2. Now, select the variant (size, color, style etc) and the Quantity as per need.
3. Click 'Add to bag' button.



4. System will now navigate to 'Shopping bag' page where the user can select whether the selected items should be delivered to an address or will be picked up in store.
5. Select 'Ship to Store' option and then click 'Checkout'.



6. User will now be routed to the Checkout page where following details need to be entered to complete the order:
 - a. Shipping Address
 - b. Delivery Options
 - c. Payment Information
 - d. Contact Information

Fabrikam Search Muhammad Raza

Accessories Menswear Womenswear Explore Fabrikam

Checkout

1. SHIPPING ADDRESS

Change

Muhammad Raza Javed
c-4 garden view terrace garden view apartments
east Windsor NJ 08520
USA
✓ 9175926693

2. DELIVERY OPTION

Change

Standard Free

3. PAYMENT METHOD

Change

Notice: Payment info is for demo purposes only and does not process actual transactions; however, your payment info will be sent to your designated third-party payment provider.

Card information
Muhammad Raza Javed Card ending in 1111 Expires 10/2020

Billing address
Muhammad Raza Javed
c-4 garden view terrace garden view apartments
east Windsor NJ 08520
USA
✓ 9175926693

4. CONTACT INFORMATION

Change

shaxsia@gmail.com

Order summary

Subtotal \$570.00
Shipping Free
Tax \$29.64
Total discounts -\$114.00
AMOUNT DUE \$485.64

Place order
Back to shopping

Shipping (2 items)

Go to Cart

Suede Leather Slip-on Loafer
Size 9
Color Light Blue
Style Regular
25% off over \$ 100 Savings
\$165.00 (20%)
Quantity 1
\$165.00 \$124.00

Soft Pink Medium Leather Shoulder Bag
25% off over \$ 100 Savings
\$183.00 (20%)
Quantity 1
\$183.00 \$123.00

Back to shopping Place order

- Once the order has been placed, 'Order Confirmation' page will display all important order details.

Shop for Thanksgiving SALE!

Fabrikam Search Muhammad Raza

Accessories Menswear Womenswear Explore Fabrikam

Dashboard / Order History / Order Detail

Confirmation ID: 18710A054AAA
Order# 993628 | 6/26/2020 | 2 items | \$485.64

DELIVERY

MUHAMMAD RAZA JAVED
C-4 GARDEN VIEW TERRACE, GARDEN VIEW APARTMENTS EAST WINDSOR, NJ 08520 USA

In Processing

Suede Leather Slip-on Loafer
Size 9
Color Light Blue
Style Regular
Total: \$124.00 Qty 1 Processing [BUY IT AGAIN](#)

Soft Pink Medium Leather Shoulder Bag
Total: \$123.00 Qty 1 Processing [BUY IT AGAIN](#)

Subtotal	\$456.00	Payment method	VISA card ending in 1111
Shipping	FREE		
Tax	\$29.64		
Total	\$485.64		

Need help?
Call 800-920-0000

Customer Service
Contact
FAQ
Delivery & Returns
Privacy Policy

Our Stores
Store & Services
Store & Hours
Store events

Store & Support
Your accounts
Your orders
Shipping rates

Follow us
f t i

- Scheduled P-0001 Job and Synchronize Orders Job in D365, will pull the order in D365FO back-office and create a sales order for the corresponding Online Web order.
- Navigate to Retail and Commerce->Customers->All Sales Orders to find the sales order.

Finance and Operations

all sales order

USRT

[+ New](#)
[Delete](#)
[Sales order](#)
[Sell](#)
[Manage](#)
[Pick and pack](#)
[Invoice](#)
[Retail](#)
[General](#)
[Options](#)

[New](#)
[Cancel](#)
[Payments](#)
[Copy](#)
[View](#)
[Functions](#)
[Attachments](#)

[Service order](#)
[Purchase order](#)
[Direct delivery](#)

[Totals](#)
[Order credit](#)
[Recap](#)
[Order holds](#)

[Notes](#)

All sales orders

Filter

✓ Sales order ↑	Customer account	Customer name	Order type	Invoice account	Channel	Status	Release status	Do not process	H...	Sales ta
888986	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
890006	004772	Scott Summers	Sales order	004772	Bazarvoice Online Store	Open order	Open			
890943	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
893003	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
893055	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
893062	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Delivered	Open			
893513	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
894147	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
894822	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
895201	004446	Ahmad Nawaz	Sales order	004446	Bazarvoice Online Store	Open order	Open			
896229	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
897542	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Delivered	Open			
898971	004772	Scott Summers	Sales order	004772	Bazarvoice Online Store	Open order	Open			
899176	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
902327	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
910188	004771	Muhammad Raza Javed	Sales order	004771	Fabrikam extended online store	Delivered	Open			
923931	004771	Muhammad Raza Javed	Sales order	004771	Fabrikam extended online store	Open order	Open			

10. Open the sales order and click on 'Post packing slip' option in 'Pick and pack' tab to post the packing slip.

Finance and Operations

all sales orders

USRT

[Edit](#)
[+ New](#)
[Delete](#)
[Sales order](#)
[Sell](#)
[Manage](#)
[Pick and pack](#)
[Invoice](#)
[Retail](#)
[General](#)
[Options](#)

[Generate picking list](#)
[Post packing slip](#)
[Picking list registration](#)
[Picking list](#)
[Intercompany picking list](#)
[Pro forma packing slip](#)
[Packing slip](#)

Sales order details

993628 : Muhammad Raza Javed

Lines Header Open order

Sales order header

DELIVERY ADDRESS

Name: Muhammad Raza Javed

Address: c-4 garden view terrace, garden view appartments east windsor, NJ 08520 USA

DELIVERY DATE

Requested ship date: 6/26/2020

Confirmed ship date:

Requested receipt date: 6/26/2020

Confirmed receipt date:

Simulate delivery dates

WAREHOUSE

Release status: Open

RETAIL

Loyalty card number:

TRANSPORTATION

Routes:

DISTRIBUTED ORDER MANAGEMENT

DOM Status: Not processed

DISCOUNTS

Total manual discount percentage: 0.00

Sales order lines

✓ T...	Variant number	Item number	Product name	Quantity	Unit	Delivery type	Adjusted unit p...	Unit price	Discount	Discount percent	Net amount	Adjusted net a...	Di
	VN-006995	92074	Suede Leather Slip-on Loafer / S...	1.00	ea	Stock	0.00000	280.00	56.00		224.00	0.00	
		91026	Soft Pink Medium Leather Shoul...	1.00	ea	Stock	0.00000	290.00	58.00		232.00	0.00	

11. Delete the lines which are not being fulfilled at the moment due to back-order.

Packing slip posting

Arrange **Select** Printer setup

Generate picking
Picking list regis
Intercompany

Setup

Net weight	Number of units	Number of cop...
0.00	2.00	0

Packing slip date: 5/26/2020
Payment terms base date
Due date
Document date

Lines

Delete Sales order line Update line Inventory

Text	Sales order	Item number	Update	Net amount	Close	Mode of delivery	Delivery name
Pure comfort for your feet with	993628	92074	1.00	224.00		99	Muhammad Raza Javed
The simple design and the	993628	91026	1.00	232.00		99	Muhammad Raza Javed

OK Cancel Batch

12. Enter tracking number in tracking info section and save it.
13. Verify all the packing slip values and update quantities on the lines and then hit 'OK' to post the packing slip.

Packing slip posting

Arrange **Select** Printer setup

Generate picking
Picking list regis
Intercompany

Parameters

PARAMETER
Quantity: All
Reduce quantity: No

PRINT OPTIONS
Print: Current
Print packing slip: No
Print shipping labels: No

SETUP
Check credit limit: None
SUMMARY ORDER
Summary update for: None

Overview

Setup

Lines

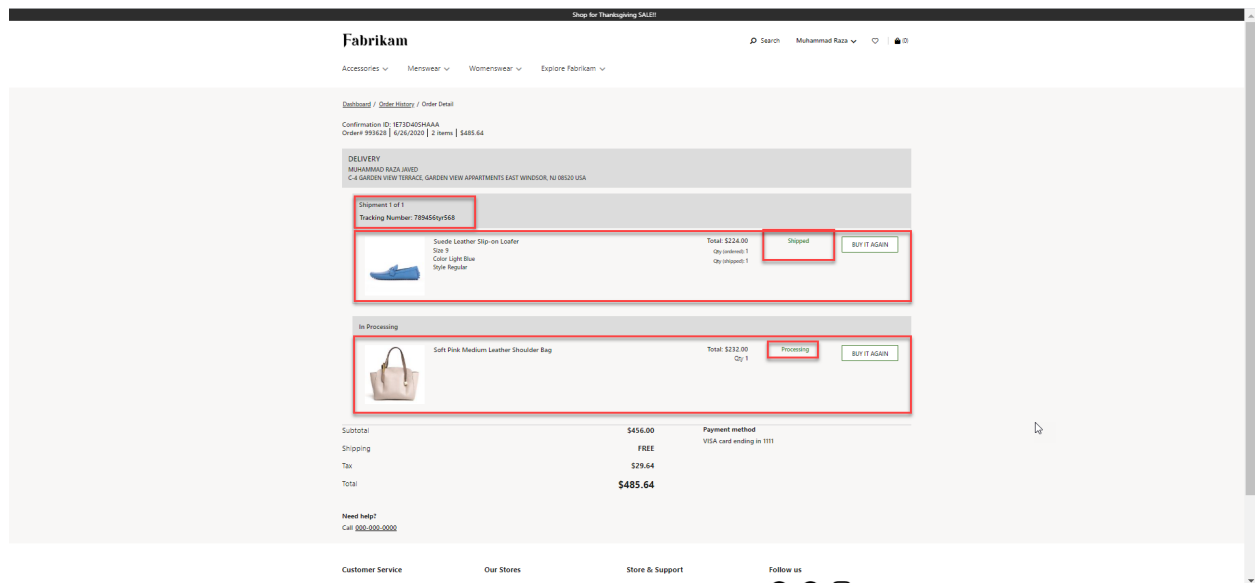
Delete Sales order line Update line Inventory

Text	Sales order	Item number	Update	Net amount	Close	Mode of delivery	Delivery name
Pure comfort for your feet	923931	92074	1.00	280.00		99	Muhammad Raza Javed

OK Cancel Batch

14. Posting of the packing slip successfully will trigger the NARVAR integration and generate the tracking information for the order. Which can be seen by clicking the 'Order History' option in the Account section of the online web store.
15. Tracking number and delivery related details can displayed on both 'Order history' page as well as on 'Order Details' page.
16. Item which was fulfilled will have a 'Shipped' status

17. The item which is not currently being fulfilled will have a status of 'Processing'



3.3.3.Packing Slip Cancelation

If/when a packing slip is canceled in D365FO for any reason, the corresponding order in the web online store changes its status from 'Shipped' to 'Processing' and tracking information is removed from the web order as well.

	Suede Leather Slip-on Loafer Size 9 Color Light Blue Style Regular	Total: \$224.00 Qty 1	Processing	BUY IT AGAIN
In Processing				
	Soft Pink Medium Leather Shoulder Bag	Total: \$232.00 Qty 1	Processing	BUY IT AGAIN
Subtotal	\$456.00	Payment method VISA card ending in 1111		
Shipping	FREE			
Tax	\$29.64			
Total	\$485.64			
Need help? Call 000-000-0000				

3.4 Partial and Full order cancellation

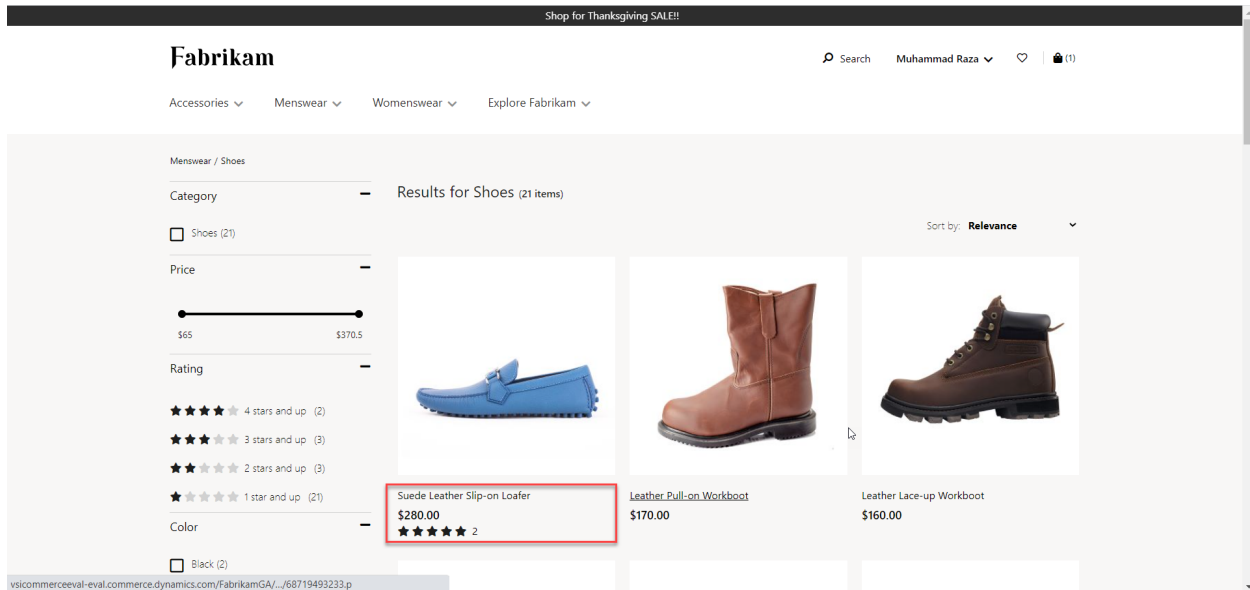
3.4.1. Scenario Details

Customer places an order on Online Ecommerce Store and partial order or complete order is canceled by the warehouse, because of item non availability or the customer cancels the order himself .

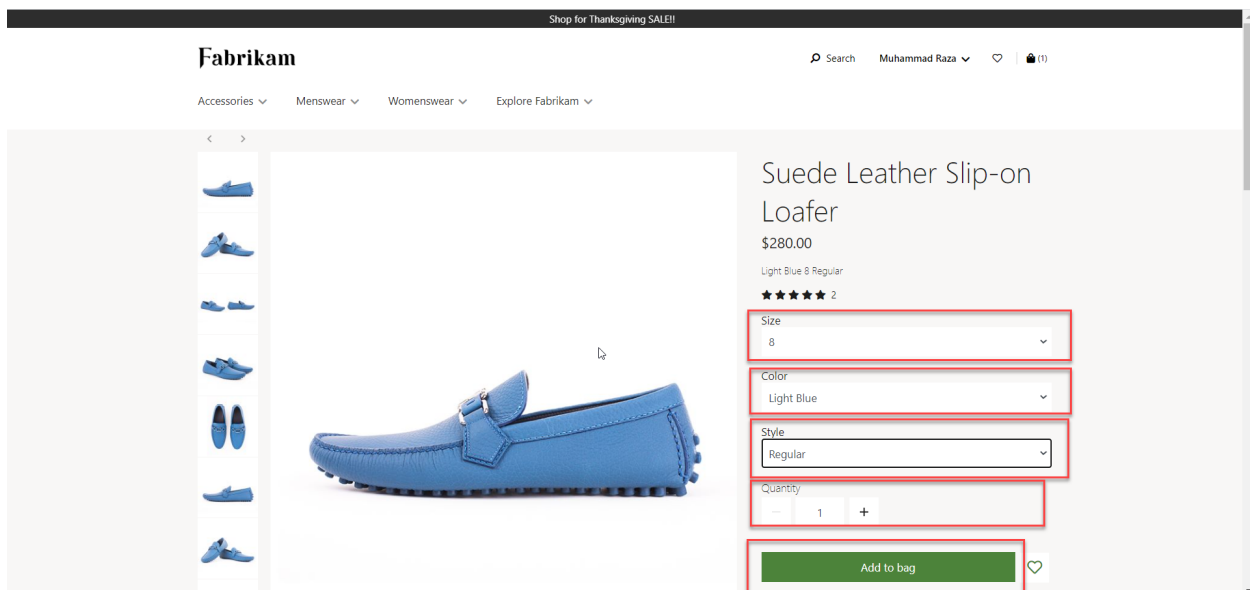
Order tracking details are generated in this particular scenario for the lines which are not canceled. If the complete order is canceled, no tracking information will be generated for this particular order.

3.1.2. Detail Steps

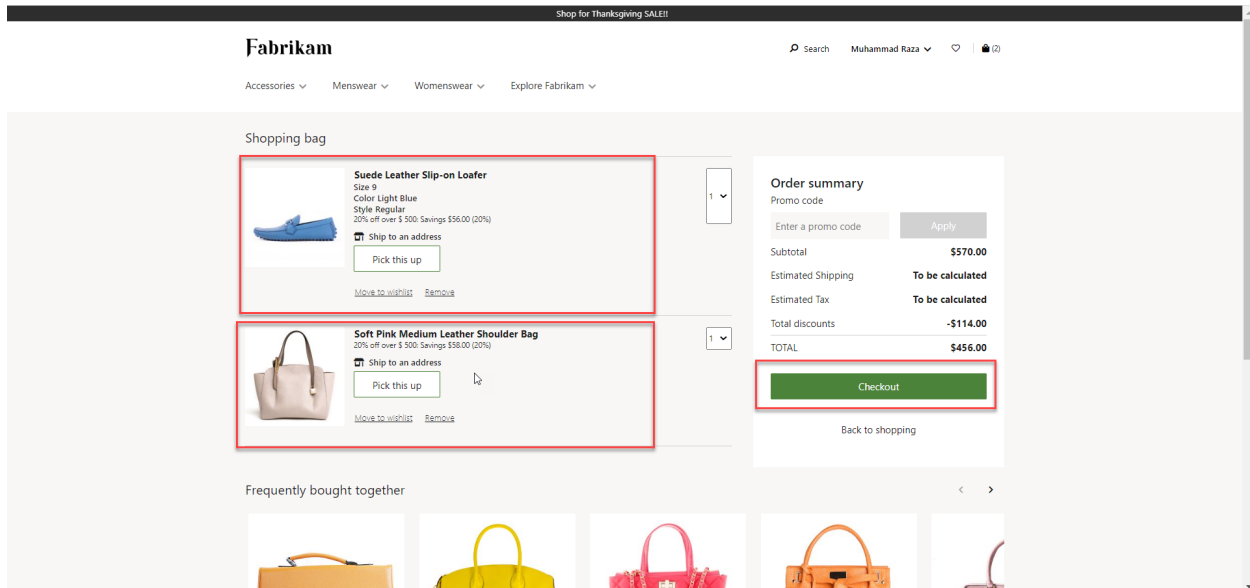
1. Go to Online Ecommerce store and select Item(s) which are to be added in the cart.



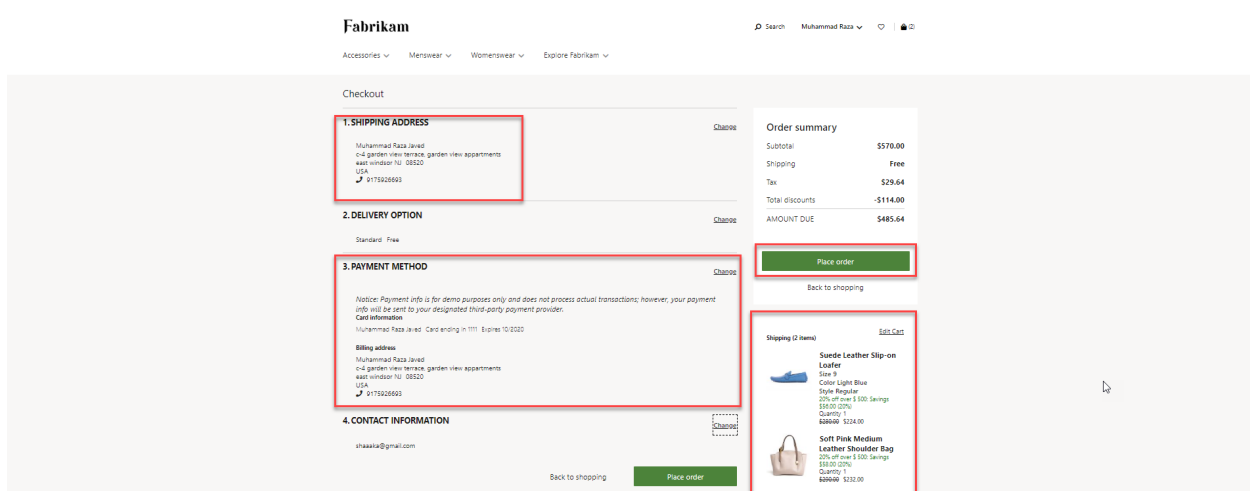
2. Now, select the variant (size, color, style etc) and the Quantity as per need.
3. Click 'Add to bag' button.



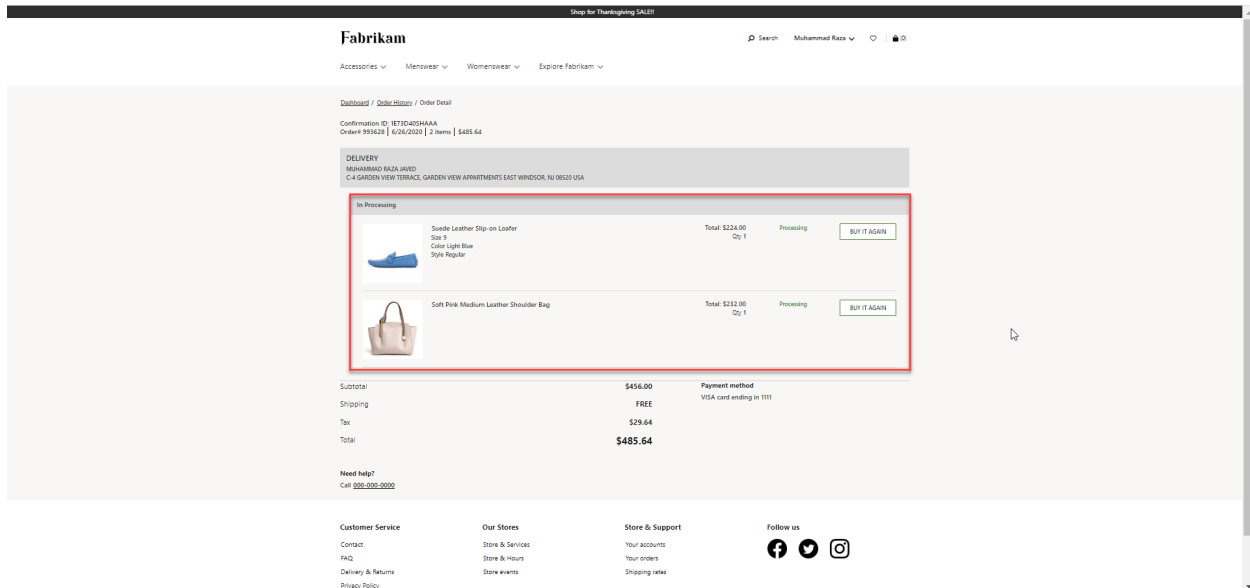
4. System will now navigate to 'Shopping bag' page where the user can select whether the selected items should be delivered to an address or will be picked up in store.
5. Select 'Ship to Store' option and then click 'Checkout'.



6. User will now be routed to the Checkout page where following details need to be entered to complete the order:
 - a. Shipping Address
 - b. Delivery Options
 - c. Payment Information
 - d. Contact Information



7. Once the order has been placed, 'Order Confirmation' page will display all important order details.



8. Scheduled P-0001 Job and Synchronize Orders Job in D365, will pull the order in D365FO back-office and create a sales order for the corresponding Online Web order.
9. Navigate to Retail and Commerce->Customers->All Sales Orders to find the sales order.

Finance and Operations

all sales order

USRT

Service order
Purchase order
Direct delivery

Cancel
Payments
From all
From journal

Copy
Totals
Order events

View
Order credit
Recap
Order holds

Functions
Attachments

All sales orders

✓ Sales order ↑	Customer account	Customer name	Order type	Invoice account	Channel	Status	Release status	Do not process	H...	Sales ta
888986	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
890006	004772	Scott Summers	Sales order	004772	Bazanvoice Online Store	Open order	Open			
890943	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
893003	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
893055	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
893062	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Delivered	Open			
893513	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
894147	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
894822	004446	Ahmad Nawaz	Sales order	004446	Fabrikam extended online store	Open order	Open			
895201	004446	Ahmad Nawaz	Sales order	004446	Bazanvoice Online Store	Open order	Open			
896229	004496	Ali Akhtar	Sales order	004496	Fabrikam extended online store	Open order	Open			
897542	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Delivered	Open			
898971	004772	Scott Summers	Sales order	004772	Bazanvoice Online Store	Open order	Open			
899176	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
902327	004772	Scott Summers	Sales order	004772	Fabrikam extended online store	Open order	Open			
910188	004771	Muhammad Raza Javed	Sales order	004771	Fabrikam extended online store	Delivered	Open			
923931	004771	Muhammad Raza Javed	Sales order	004771	Fabrikam extended online store	Open order	Open			

10. To cancel one or more lines, select the line and Click on 'Update Line' tab and click on 'Deliver Remainder' and Cancel the deliver remainder. The status of the line in D365FO will be changed to 'Canceled' as well.

Finance and Operations

Search for a page

USRT

Edit + New Delete Sales order Sell Manage Pick and pack Invoice Retail General Options

Generate picking list Post packing slip Picking list registration Pro forma packing slip Picking list

Sales order details

1000000 : Muhammad Raza Javed

Lines Header Open order

Sales order header

DELIVERY ADDRESS Delivery address Muhammad Raza Javed Address c-4 garden view terrace, garden view apartments east windsor, NJ 08520 USA

DELIVERY DATE Requested ship date 6/26/2020 Requested receipt date 6/26/2020 Simulate delivery date

WAREHOUSE Release status Open

TRANSPORTATION Routes

RETAIL Loyalty card number

DISTRIBUTED ORDER MANAGEMENT DOM Status Not processed

Update line

Sales order lines

Variant number	Item number	Product name	Quantity	Unit	Delivery type	Adjusted unit p...	Unit price	Discount	Discount percent	Net amount	Adjusted net a...	Dt
VN-006967	92074	Suede Leather Slip-on Loafer / S...	1.00	ea	Stock	0.00000	280.00	56.00		224.00	0.00	
	91026	Soft Pink Medium Leather Shoul...	1.00	ea	Stock	0.00000	290.00	58.00		232.00	0.00	

11. The corresponding online store order line also depicts the 'Canceled' status.

Dashboard / Order History / Order Detail

Confirmation ID: D528DC35HAAA
Order# 1000000 | 6/26/2020 | 2 Items | \$247.08

DELIVERY
MUHAMMAD RAZA JAVED
C-4 GARDEN VIEW TERRACE, GARDEN VIEW APARTMENTS EAST WINDSOR, NJ 08520 USA

In Processing

Suede Leather Slip-on Loafer
Size 8
Color Light Blue
Style Regular

Total: \$224.00
Qty (ordered): 1
Qty (shipped): 0

Canceled

BUY IT AGAIN

DELIVERY
MUHAMMAD RAZA JAVED
C-4 GARDEN VIEW TERRACE, GARDEN VIEW APARTMENTS EAST WINDSOR, NJ 08520 USA

In Processing

Soft Pink Medium Leather Shoulder Bag

Total: \$232.00
Qty 1

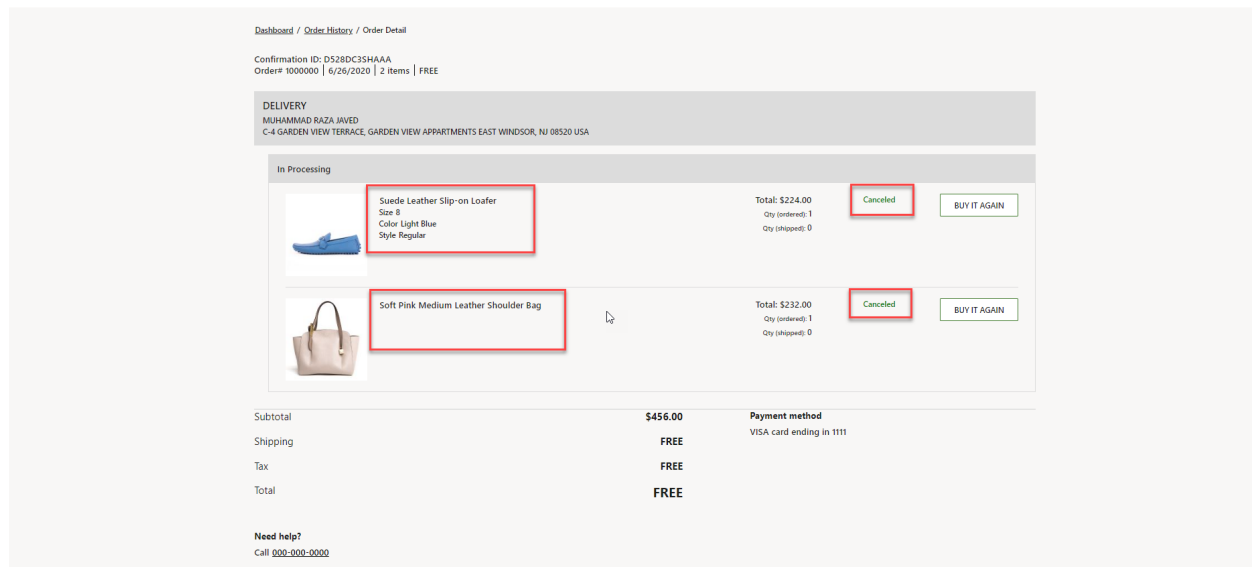
Processing

BUY IT AGAIN

Subtotal \$456.00
Shipping FREE

Payment method
VISA card ending in 1111

12. Canceling the remaining lines in D365FO will mark the sales order as 'Canceled' in D365FO and its corresponding online store order will be marked as canceled as well.



3.5 Tracking information on sales order

The tracking URL builder's trigger point is the tracking number entered in the packing slip. The tracking number can be entered manually or any 3rd party API integration.

1. Navigate to sales order and open relevant sales order
2. Generate and register picking list
3. Click on post packing slip on the Pick and pack action menu
4. In the overview section, click on tracking information
5. In the tracking information screen, press Add to enter a tracking number
6. Enter tracking number and save
7. Close the tracking information screen and user is taken to the packing slip posting screen
8. Post the packing slip
9. Open the posted packing slip and click on tracking information
10. The tracking URL as per Navar parameters is displayed
11. The tracking URL and image from Narvar will also be displayed to the customer on order detail screen and on email (when packing slip is posted)
12. The customer will also receive an email (see Email configuration section) on which tracking information will be displayed

13. Clicking on the tracking information will redirect the user to Narvar page with detailed information about the tracking

3.6 Regenerate tracking URL

In the scenario that a URL has failed to be created for any packing slip due to some missing parameter in the configuration, a regenerate URL button is provided to user to manually regenerate tracking URL from the packing slip journal screen

A URL can fail to generate due to following conditions:

1. Retailer name has not been entered
2. Mode of delivery is not associated to Narvar carrier information
3. If such a case arises at time of packing slip posting, an error message is displayed next to the URL field.
4. After entering the missing parameters, navigate to sales order and open relevant sales order that has an error against the tracking URL
5. Open the posted packing slip
6. Click on the Regenerate URL button. This will regenerate the URL.
7. The URL will now also be available on the order details page of the customer

The screenshot shows the 'Packing slip journal' interface for customer 197090. The 'Order tracking' tab is active. The 'CARRIER' section has input fields for 'Shipping carrier' and 'Carrier service'. The 'TRACKING INFORMATION' table is as follows:

Tracking number	Tracking URL
Testing1234	https://Test.narvar.com/Test/trac...

3.7 Tracking info on e-commerce order detail screen

Once the tracking URL has been generated, it will be used to display the tracking information on the online e-commerce site in the order history and details screen.

1. This will be directly integrated from Narvar and will show info against the products for the customer.
2. The tracking information will be displayed per packing slip (group by shipment).
3. Similar products will be aggregated e.g. if there are 3 x Blue Suede Pumps, it will be shown once with 3 qty
4. The “Track my package” button will redirect the user to the tracking information on Narvar website for this particular shipment

Summer collection online now!

Fabrikam

SearchAaira♡(0)

Menswear▼Womenswear▼Accessories▼Contact

[My account](#) / [Order history](#) / Order details

Order# Processing | 6/10/2020 | 4 item | \$177.35
Confirmation ID: EA066E8AAIRA
Tracking number: Not yet available

Shipment 1 of 2

Delivery Address: 4B Cedar Brook Dr Hostan, CA 77056 USA



Blue polo shirt

Color: Light Blue • Size: XL

\$123

Quantity:1

Processing

BUY IT AGAIN



Skin Jacket

Color: Light orange • Size: XL

\$500

Quantity:5

Processing

BUY IT AGAIN

Estimated Delivery

Still Calculating

Check Back Soon

Track My Package

Ready To Go



Shipment 2 of 2

Delivery Address: 4B Cedar Brook Dr Hostan, CA 77056 USA



Beats headphones

Color: Black

\$200

Quantity:2

Processing

BUY IT AGAIN



Macbook cover

Color: Mustard

\$250

Quantity:1

Processing

BUY IT AGAIN

Estimated Delivery

Still Calculating

Check Back Soon

Track My Package

Ready To Go



36 | Page

Summer collection online now!

≡ Fabrikam

🛒 (0)

[My account](#) / [Order history](#) / Order details

Order# Processing | 6/10/2020 | 4 item |
\$177.35
Confirmation ID: EA066E8AAIRA
Tracking number: Not yet available

Estimated Delivery
Still Calculating
Check Back
Soon

Ready To Go


Track My Package

Shipment 1 of 2

Delivery Address: 4B Cedar Brook Dr
Hostan, CA 77056 USA



Blue polo shirt \$123

Color: Light Blue - Size: XL

Quantity:1

Processing

BUY IT AGAIN



Skin Jacket \$500

Color: Light Orange - Size: XL

Quantity:5

Processing

BUY IT AGAIN

Estimated Delivery
Still Calculating
Check Back
Soon

Ready To Go


Track My Package

Shipment 2 of 2

Delivery Address: 4B Cedar Brook Dr
Hostan, CA 77056 USA



Beats headphones \$200

Color: Black

Quantity:2

Processing

BUY IT AGAIN



Macbook cover \$250

Color: Mustard

Quantity:1

Processing

BUY IT AGAIN

3.8 Tracking info on email

Once packing slip has been posted from backoffice, an email will be sent to customer (needs to be configured in D365) which will have the order details with tracking information. This will be similar to tracking info div shown on e-commerce order detail screen. This will be directly integrated from Narvar and will show info against the products for the customer.

1. The tracking information will be displayed per packing slip (group by shipment).
2. Similar products will be aggregated e.g. if there are 3 x Blue Suede Pumps, it will be shown once with 3 qty
3. The “Track my package” button will redirect the user to the tracking information on Narvar website for this particular shipment