



Cancelling Agency Orders

Purpose of this document

The Cancel Agency Order process provides the ability to delete Open Agency Orders that will not be fulfilled, recording an image of the deleted Agency Order along with a user defined/selected Reason Code. Using the archived Agency Order functionality will provide the user the ability to view deleted orders and the reason for deletion. The purpose of this document is to outline the workflow process for cancelling Agency Orders.

All of the restrictions for deletion of open agency orders will still apply. If deletion of the agency order is prohibited for any reason, this process will also respect those restrictions and not allow the cancellation of open agency order. See Agency Order Overview and Agency Express 3 Managing Web Orders for more information.

Ceres Object release 5.00.00 is required for the functionality described in this document.

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General Workflow

Setup

The process of canceling an Agency Order will attempt to email the Agency notifying them of cancellation. The email address used for this notification is found on the Communication FastTab of the Agency Card. It does not send to the associated Shopper.

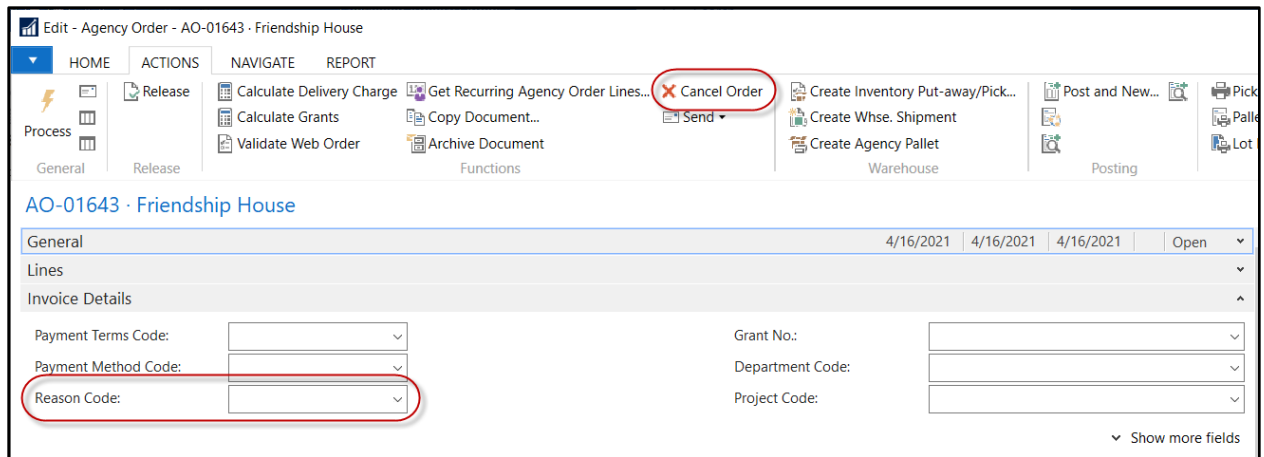
The screenshot shows a software interface for editing an agency card. The title bar reads "Edit - Agency Card - B0129 · Safehome, Inc.". Below the title bar is a navigation menu with tabs: HOME, ACTIONS, NAVIGATE, and REPORT. The ACTIONS tab is active, displaying various icons and labels: View, Edit, New, Delete, Resend, Agency Account Detail, Open Agency Entries, Agency Order, Agency Return Order, Agency Invoice, Agency Credit Memo, Ship-to Addresses, and Contact. The main content area shows the agency name "B0129 · Safehome, Inc." and a "General" tab. Below this is the "Address & Contact" section, which includes an "Address" subsection with a "Show on Map" link, and a "Contact" subsection. The contact information is as follows:

Primary Contact Code:	RMCON-0139
Contact Name:	John Smith
Phone No.:	555-444-3333
Email:	karenk@esopro.com
Home Page:	

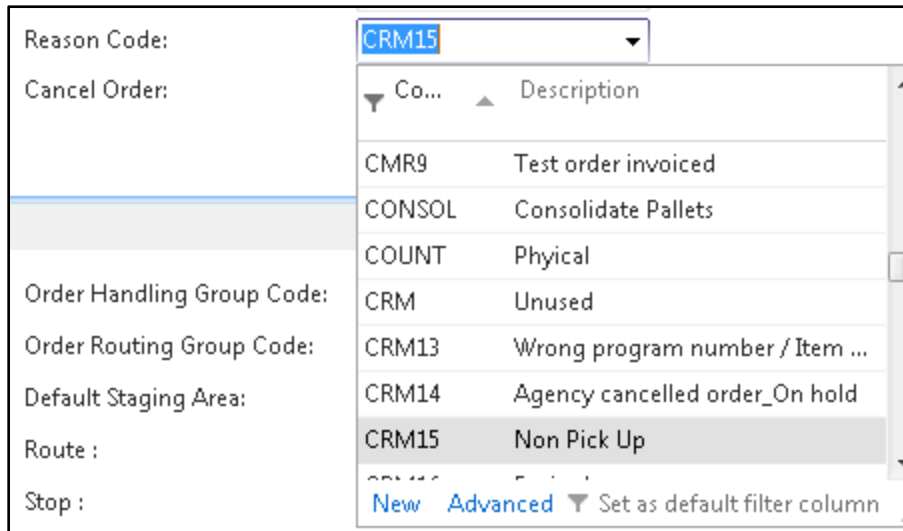
The "Email" field is circled in red.

Agency Order

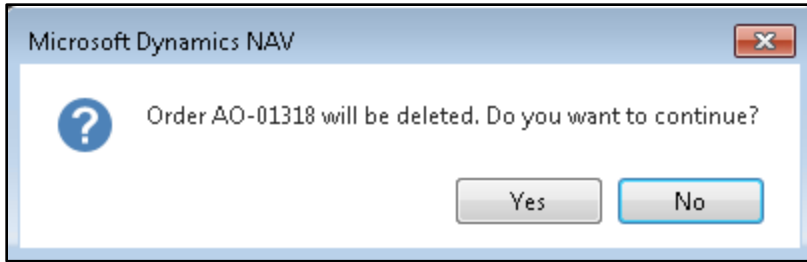
To Cancel an Agency Order, a Reason Code on the Invoice Details FastTab must be provided. The Reason Code will be selected from a list of valid Codes.



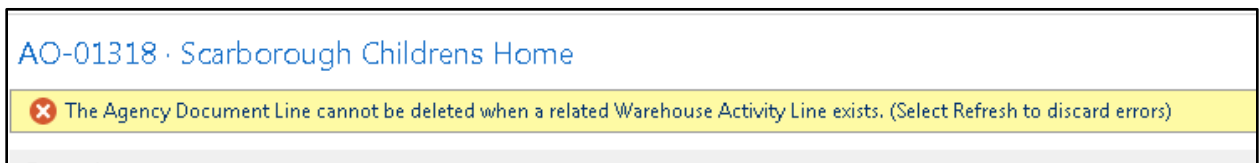
1. To initiate the process of cancelling the Agency Order, select a Reason Code. In this example, a Reason Code CMR15 was selected denoting the Agency did not pick up the product.



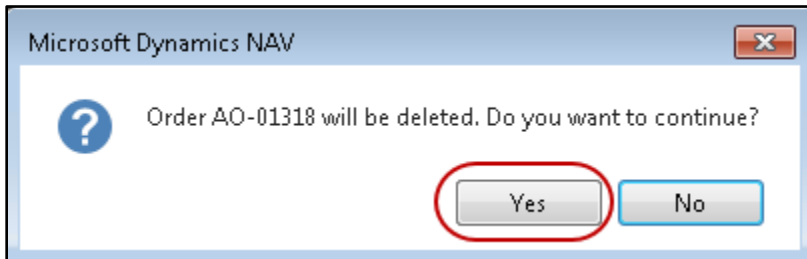
2. Next click Actions → Functions → Cancel Order to indicate that you wish to initiate the Agency Order Cancellation process.
3. A dialog box will appear asking you to confirm your decision to cancel the Agency Order. Select Yes if you wish to continue with the Agency Order cancellation process. Select No if you have made an error or do not wish to abort the Agency Order cancellation process for any reason. This is the last chance to cancel the process. Selecting Yes will perform the appropriate database checks to ensure that deletion is allowed, and if there are no restrictions prohibiting deletion, the order will be cancelled.



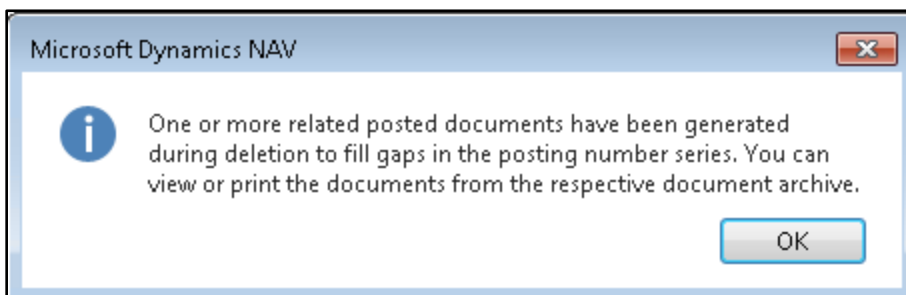
4. Below is an example of a restriction that may occur stopping the cancellation of the Agency Order. Agency Order deletion is not allowed if there are outstanding warehouse documents pending against the Agency Order. In below example, there outstanding inventory pick documents open which results in an error message. It will be necessary to clear any restrictions before continuing with the cancellation process.



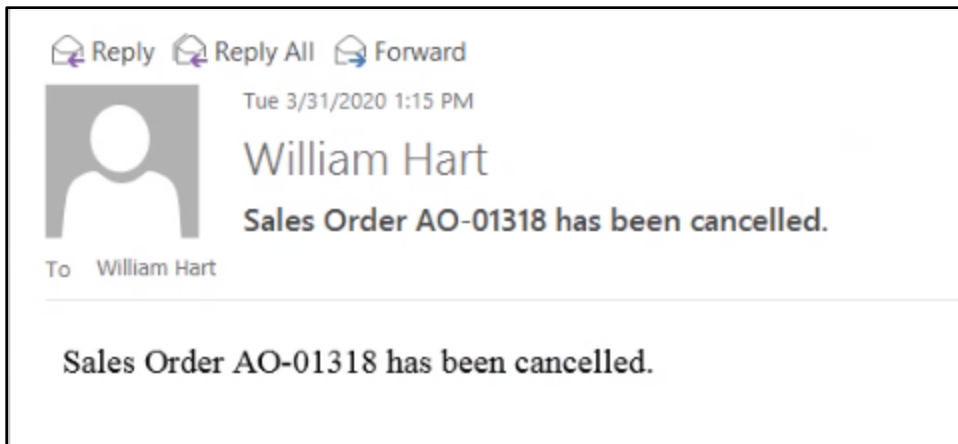
5. Clear the restrictions and proceed with the cancellation process. Click the Cancel Order check box and select Yes to continue.



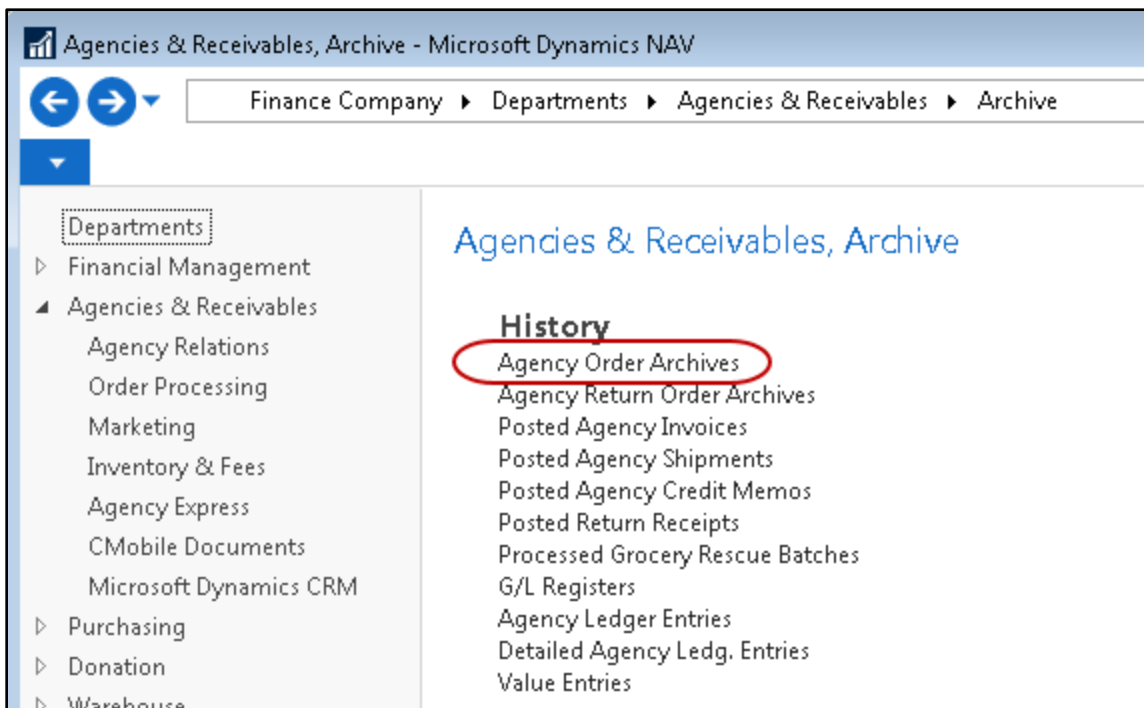
6. After clicking Yes in the confirmation dialog box the process begins. This message will be displayed. You can view/print the respective documents if necessary from the agency order archives.



7. At this point, the latest version of the Agency Order has been archived and the Agency Order has been cancelled. If the Agency email address was valid, an email notifying the Agency of the order cancellation has been sent. Below is an example of the email received.



- To view archived agency order documents go to Departments → Agencies & Receivables → Archive and then select Agency Order Archives. A list of archived orders will be displayed. Select the correct Order and double-click on it to open the archived document.



Agency Order Archives Type

No.	Version No.	Date Archived	Time Archived	Archived By	Inter... Exist	Sell-to Agenc...	Sell-to Agency Name	External Docume...	Sell-to Contact	Sell-to ZIP Code	Sell-to Count...
AO-01318	1	3/31/2020	1:14:47 PM	ESOPRO\...	<input type="checkbox"/>	A1764	Scarborough Childrens Home		Elizabeth Sartain		
AO-01316	3	3/30/2020	11:33:17 AM	ESOPRO\KJK	<input type="checkbox"/>	B0358	Rose Brooks Center		Johnnie Prince		
AO-01316	2	3/30/2020	11:33:17 AM	ESOPRO\KJK	<input type="checkbox"/>	B0358	Rose Brooks Center		Johnnie Prince		
AO-01316	1	3/30/2020	11:30:50 AM	ESOPRO\KJK	<input type="checkbox"/>	B0358	Rose Brooks Center		Johnnie Prince		
AO-01315	1	3/30/2020	11:17:02 AM	ESOPRO\KJK	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01312	2	3/26/2020	7:26:08 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01312	1	3/26/2020	7:26:00 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01310	2	3/24/2020	11:30:00 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01310	1	3/24/2020	6:28:35 PM	ESOPRO\E...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01309	2	3/24/2020	11:48:46 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01309	1	3/24/2020	7:04:28 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01308	2	3/24/2020	12:29:32 PM	ESOPRO\R...	<input type="checkbox"/>	B0310	Newhouse, Inc.		Bea Lynn Tucker		
AO-01308	1	3/24/2020	12:29:19 PM	ESOPRO\R...	<input type="checkbox"/>	B0310	Newhouse, Inc.		Bea Lynn Tucker		
AO-01305	1	3/16/2020	10:55:34 AM	ESOPRO\KJK	<input type="checkbox"/>	B0558	Hope House, Inc.		Gary Ashmore		
AO-01304	1	3/16/2020	10:55:27 AM	ESOPRO\KJK	<input type="checkbox"/>	B0358	Rose Brooks Center		Johnnie Prince		
AO-01303	2	3/16/2020	10:32:36 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01303	1	3/16/2020	10:32:35 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01302	2	3/16/2020	10:31:08 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01302	1	3/16/2020	10:31:07 AM	ESOPRO\R...	<input type="checkbox"/>	B0129	Safehome, Inc.		John Smith	76677	
AO-01301	1	3/16/2020	10:55:18 AM	ESOPRO\KJK	<input type="checkbox"/>	B0310	Newhouse, Inc.		Bea Lynn Tucker		
AO-01300	1	3/16/2020	10:54:59 AM	ESOPRO\KJK	<input type="checkbox"/>	B0558	Hope House, Inc.		Gary Ashmore		

9. Below is an example of the cancelled Agency Order. Note the Reason Code is displayed on the General FastTab.

AO-01318 · Scarborough Childrens Home · 2

General

No.: <input type="text" value="AO-01318"/>	Order Date: <input type="text" value="3/30/2020"/>
Sell-to Agency No.: <input type="text" value="A1764"/>	Document Date: <input type="text" value="3/30/2020"/>
Sell-to Contact No.: <input type="text"/>	Requested Delivery Date: <input type="text"/>
Sell-to Agency Name: <input type="text" value="Scarborough Childrens Home"/>	Promised Delivery Date: <input type="text"/>
Sell-to Address: <input type="text" value="Do Not Disclose"/>	External Document No.: <input type="text"/>
Sell-to Address 2: <input type="text"/>	Responsible person Code: <input type="text"/>
Sell-to City: <input type="text"/>	Campaign No.: <input type="text"/>
Sell-to State / ZIP Code: <input type="text" value="MO"/>	Branch Code: <input type="text"/>
Sell-to ZIP Code: <input type="text"/>	Status: <input type="text" value="Released"/>
Sell-to Contact: <input type="text" value="Elizabeth Sartain"/>	Reason Code: <input type="text" value="CRM15"/>
Posting Date: <input type="text" value="3/30/2020"/>	

Lines

Line	Type	No.	Description	Location Code	Quantity	Unit of Measur...	Tax Group Code	Line Amount Excl. Tax	Line Disco
10018R	Item		Raspberry Syrup	TOP	4	CASE		6.48	

Related Topics

1. [Agency Overview](#)
2. [Agency Order Overview](#)
3. [Agency Express Managing Web Orders](#)