

# Automatic Order Processing (AOP)

---

Using FTD Mercury, you can receive incoming orders from the Mercury Network, Florists Online (FOL), Flowers All Hours (FAH), and Web sites via the Web Order Interface (WOI). Most of these orders already contain all the information necessary to process the order; Automatic Order Processing (AOP) in FTD Mercury allows you to configure your system to handle these orders automatically if they contain all necessary information for processing. This saves you time, and allows you to focus on orders that cannot be processed automatically. Those orders are still available as usual via Attach Incoming.

For example, you may have a Web site that allows customers to place orders. If a customer places an order for a recipient outside of your delivery zones, AOP can automatically process the order and send the Mercury order to a filling florist where the recipient lives—without your intervention.

Automatic Order Processing is set up on a per-florist code level (that is, you can have different configurations for different shop codes if you are a multi-shop florist). You can configure AOP in the Automatic Order Processing screen in Mercury Administration.

---

**IMPORTANT** You must be processing credit cards over the Internet (via a high-speed connection) to use Automatic Order Processing.

---

Orders that have been processed automatically appear in the Message Center window with the order number assigned to them. Orders that cannot be processed automatically appear in the Message Center window and are included in the list when you open the Message Center from Order Entry or Point of Sale (search for messages requiring attention). Once Automatic Order Processing determines it cannot process an order automatically, it will not reattempt to process it automatically later.

Once an order has been automatically processed, it appears in the Ticket Search screen with other processed orders.

## Outgoing Order Handling by Automatic Order Processing

Automatic order processing sends all identified outgoing orders over the Mercury Network. It automatically selects a florist in the recipient's city, using configured preferences in determining the florist. If a florist exists in the city that you have flagged as an First Choice florist, FTD Mercury will pick that florist. If no First Choice florist exists in that city, FTD Mercury will select a Preferred florist. If no Preferred florist exists in that city, FTD Mercury will attempt to use a florist you have used before. Otherwise, FTD Mercury will then pick a Normal florist. Under no circumstances will

FTD Mercury use a florist with a Not Preferred status—even if that is the only florist for the city. In this case, you will have to manually process the order.

If no florist exists for the city, FTD Mercury will choose a florist who also serves that city whenever possible. If there are no florists who serve that city and no other florists have an Also Serves status for that city, the order cannot be processed automatically.

When orders are automatically processed as outgoing orders, FTD Mercury always assigns a wire out zone. If no zone can be found for the address, FTD Mercury uses the default wire out zone. In this configuration, even if a local, pickup, or pool delivery zone is found for the address, FTD Mercury will still use the default wire out zone.

**NOTE** If you are using a Canadian system, and if the wire out zone cannot be found or the address is within a local zone, the order cannot be automatically processed.

All incoming Mercury orders as local orders. If an incoming Mercury order is received for an address within a wire out zone, the order cannot be processed automatically. All outgoing Mercury orders that are automatically processed are sent with the Auto Forward setting enabled.

## Credit Card Payments and Automatic Order Processing

Flowers All Hours, Florist Online, and Web orders received with a credit card payment are automatically processed according to the automatic order processing rules defined in Mercury Administration. Only the credit card provided in the order will be used, regardless if whether the customer already has an account in FTD Mercury and has other credit cards on file.

If a credit card order is received and a customer does not exist in the FTD Mercury database, FTD Mercury handles new account creation under the following rules:

**Table 10-1: How Automatic Order Processing Handles Account Creation and Processing Credit Cards**

If the customer name is...	If the customer phone number is...	Create account?	Automatically process order?
The only match in the FTD Mercury database	Matched or unmatched	No	Yes
Not in the FTD Mercury database	Matched or unmatched	Yes	Yes
Matched by more than one name in the FTD Mercury database	A single match in the FTD Mercury database	No	Yes
Matched by more than one name in the FTD Mercury database	Not matched in the FTD Mercury database	No	No (you will have to manually process this order via Attach Incoming)
Matched by more than one name in the FTD Mercury database	Matched by more than one phone number in the FTD Mercury database	No	No (you will have to manually process this order via Attach Incoming)

If a credit card is declined or authorization is unsuccessful, the transaction will appear in the Unsettled Credit Card Authorizations window.

Orders received with the payment type of house charge will not be automatically processed, nor will orders with a payment type of COD. Incoming FTD Mercury orders will be processed as charges to the wire service house account.

## Potential Issues that Prevent Automatic Order Processing

FTD Mercury cannot automatically process all orders if necessary information is missing or incomplete. Some examples of reasons why AOP cannot automatically process an order include:

- » Invalid or incomplete credit card information
- » No recipient
- » No recipient address
- » No product description
- » No product price
- » Outgoing order total less than or equal to zero dollars
- » No delivery zone found for address (unless processing all orders as outgoing)
- » Product amount is less than or equal to zero dollars
- » Payments with type of house charge or COD
- » Inconsistent tax rates between Web site and FTD Mercury

## Automatic Order Processing Screen

The Automatic Order Processing screen in Mercury Administration allows you to configure settings for how FTD Mercury automatically handles incoming messages (Mercury orders, Flowers All Hours, Florists Online, and Web orders using the Web Order Interface).

---

**IMPORTANT** You can only use Automatic Order Processing if you process credit cards over the Internet, as opposed to processing them through a dial-up (modem) connection. If you are not configured to process credit cards over the Internet, the configurations on this screen will be disabled.

---

If an order cannot automatically be processed (because it lacks necessary information), you will have to attach the order manually in Order Entry or Point of Sale.

**Figure 10-1: Automatic Order Processing Screen in Mercury Administration**

Order Types	Local Orders	Outgoing Orders	All orders as Outgoing
Incoming Orders	<input checked="" type="checkbox"/>		
FAH Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FOL Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Automatic order processing is defined on a per-store basis, meaning if you are configured as a multi-store system, you must configure settings for how each store handles order processing.

For each store, you need to configure how (and whether) FTD Mercury incoming orders, Flowers All Hours (FAH) orders, Florists Online (FOL) orders, and orders from your Web site (via the Web Order Interface) are processed. By default Automatic Order Processing is disabled. For each order type, all orders of that type will automatically be processed by the options you set.

- » **Local Orders**—When you select this option, FTD Mercury will automatically process local orders of the selected type. Incoming FTD Mercury orders can only be processed as local orders. If you select this option for an order type, the All Orders as Outgoing box will be cleared.
- » **Outgoing Orders**—When you select this option, FTD Mercury will automatically process outgoing orders of the selected type. If you select this option for an order type, the All Orders as Outgoing box will be cleared.
- » **All Orders as Outgoing**—When you select this option, all orders of the type you are configuring will be processed as outgoing orders. If you select this option, the Local Orders and Outgoing Orders boxes will be cleared.

If you want to disable automatic order processing in FTD Mercury for a particular order type, clear all check boxes for that order type. If you want to disable automatic order processing entirely, clear all check boxes in the order processing configuration grid.

**NOTE** If you have automatic order processing configured for your FOL site and you have either Outgoing Orders or All Orders as Outgoing selected, any WebGifts orders will automatically be sent to FTD without any intervention.

## Accessing the Automatic Order Processing Screen

**TASK** To access the Automatic Order Processing Screen screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Wire Service** folder.
- 4 Double-click **Automatic Order Processing**. The **Automatic Order Processing** screen opens.

# Configuring Automatic Order Processing

**TASK** To configure automatic order processing for a store:

- 1 In **Mercury Administration**, access the **Automatic Order Processing** screen.
- 2 From the store list, select the store for which you are configuring automatic order processing.
- 3 For each order type (**FTD Incoming**, **Flowers All Hours**, **Florists Online**, and **Web** orders), select how you want to handle the orders.
- 4 Click **Apply** to save your changes.

If you are configured as a multistore environment, select another store and repeat this process on a per-store basis.

## Disabling Automatic Order Processing

You can disable automatic order processing for either particular order types or completely.

**TASK** To disable automatic order processing for a particular order type:

- 1 In **Mercury Administration**, access the **Automatic Order Processing** screen.
- 2 From the store list, select the store for which you want to change configurations.
- 3 For the order type for which you want to disable automatic order processing, clear the check boxes in the row so they are blank.
- 4 Click **Apply** to save your changes.

If you have multiple stores and want all stores to be configured the same way, repeat for each additional store.

**TASK** To disable automatic order processing for all order types:

- 1 In **Mercury Administration**, access the **Automatic Order Processing** screen.
- 2 From the store list, select the store for which you want to change configurations.
- 3 Clear all the check boxes in the **Automatic Order Processing** grid so they are all blank.
- 4 Click **Apply** to save your changes.

If you have multiple stores and want all stores to be configured the same way, repeat for each additional store.

## Configuring AOP for Send-Only Florists

If you are a send-only florist, you can set up automatic order processing to send all orders you receive as outgoing Mercury orders.

**TASK** To configure AOP to send all orders received as outgoing Mercury orders:

- 1 In **Mercury Administration**, access the **Automatic Order Processing** screen.
- 2 Select the store for which you are configuring automatic order processing.
- 3 For FAH, FOL, and Web orders, select the **All orders as Outgoing** box.
- 4 Click **Apply**.
- 5 Repeat for any additional stores, if necessary.

FTD Mercury will automatically process all orders as outgoing for FAH, FOL, and Web orders via WOI. If any orders do not meet the criteria for being automatically processed, you will still need to manually process them by attaching the incoming orders. However, the vast majority of orders should be processed without your intervention.

# Florists Online and Flowers All Hours Product Codes

FTD Mercury automatically updates products, fees, and taxes associated with FTD Mercury, Florists Online (FOL), Flowers All Hours (FAH), and Web Order Interface (WOI) orders before automatically processing the orders.

When orders are processed for Florists Online (FOL) and Flowers All Hours (FAH), you need to ensure product codes for delivery fees and other charges are set up the same way in FTD Mercury as FOL and FAH. For example, you may tax the delivery fee on your FOL site; to ensure the order is processed correctly, the delivery fee should be taxed in FTD Mercury as well.

**NOTE** When orders are received from FOL, FAH, or WOI, the delivery charge and service charges are used on the order instead of fees associated with the delivery zone.

There are several product codes in FTD Mercury associated with Automatic Order Processing and FOL/FAH orders. They are:

**Table 10-2: FOL and FAH Product Codes**

Product Code	Name	Type
SYS_ADD_ON	Add On	Product Amount
SYS_DELIVERY	Delivery	Delivery Charge
SYS_DISCOUNT	Discount	Coupon
SYS_PRODUCT	Product	Product Amount
SYS_RELAY	Relay	Relay Charge
SYS_RETRANS	Retrans	Relay Charge
SYS_SERVICE	Service	Service Charge

You should ensure these products are configured correctly for taxes and amounts so FAH and FOL orders are correct when processed using FTD Mercury.

## Automatic Order Processing and the System Employee

When an order is automatically processed by **FTD Mercury**, the employee associated with the order is named **System**. When you view an order, if the **Employee** is **System**, the order was automatically processed.

---

**IMPORTANT** Do not remove or terminate the **System** employee in Mercury Administration.

---

### Searching for Automatically Processed Orders

You can perform a **Ticket Search** by employee to locate all orders automatically processed by FTD Mercury.

**TASK**    **To search for orders automatically processed by FTD Mercury:**

- 1 On the **FTD Mercury Main Menu**, in the Search area, click **Ticket**. The **Ticket Search** window opens.
- 2 Click the **Employee** tab.
- 3 In the text box, enter **System**.
- 4 Select the store you want to search in from the **Store Name** list.
- 5 If you want to restrict your search to a specific date:
  - a. Select the **Use Date in Search** check box.
  - b. Select whether you want to search by **Sale** date or by **Delivery** date.
  - c. Enter the date.
- 6 Click **Search**.

Orders that appear in the results list are ones that FTD Mercury automatically processed.

