STIHL

STIHL EXPRESS GUIDEBOOK

—

ALL YOU NEED TO KNOW TO ACTIVATE STIHL EXPRESS ON STIHL POWERCHORD WEBSITES

HOW TO SET UP BOPIS (IN-STORE PICKUP), DELIVER FROM STORE, AND SHIP TO HOME

May 2023

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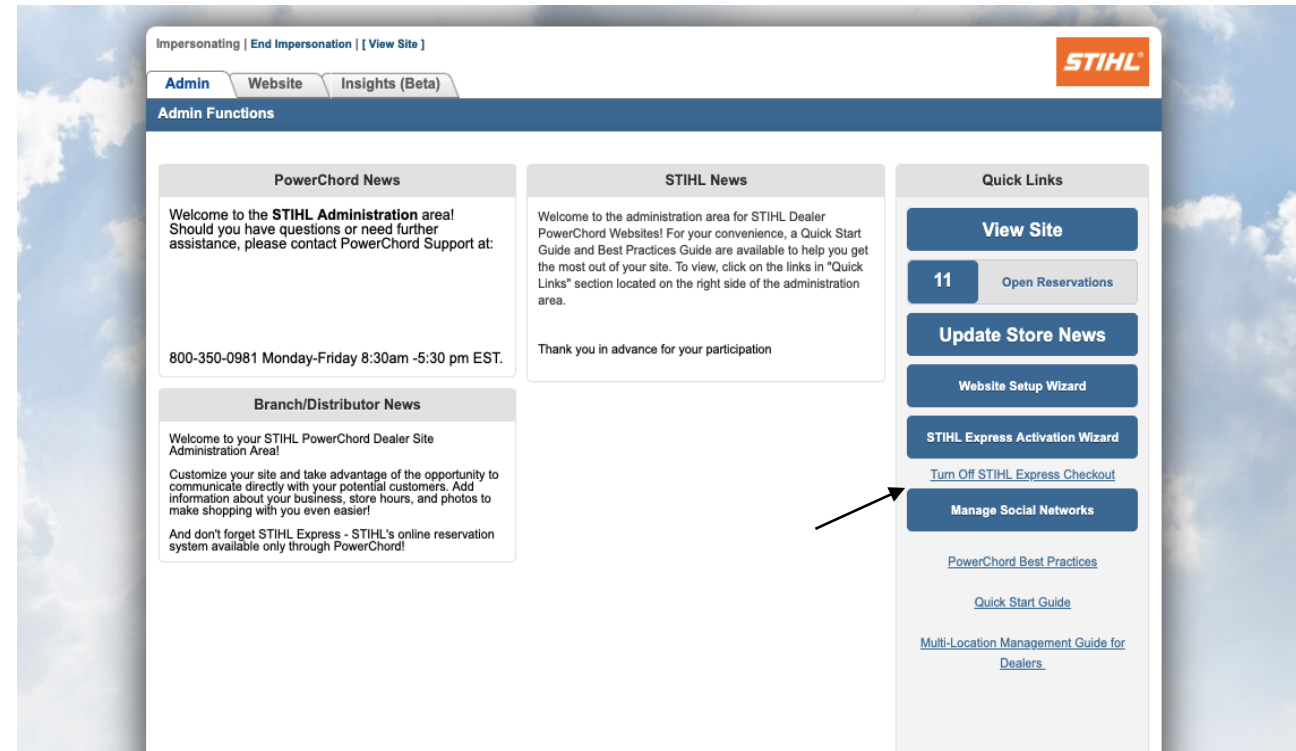
BOPIS Activation

STIHL

The STIHL Express Activation Wizard will populate the appropriate steps and information for STIHL Express activation – "Buy Online Pick-up In Store" also referred to as BOPIS.

Reference images are included to help provide detailed instructions on the set-up process.

The STIHL Express Activation Wizard can be accessed through the STIHL PowerChord Administration Website.

To learn more about STIHL Express Activation and your options for online payment, access the BOPIS Activation Guide.

Note: You must activate STIHL Express with BOPIS **before** you can activate the Deliver From Store or Ship To Home feature.

BOPIS Payment Processing Options

With STIHL Express activated for your PowerChord site, customers can buy online and pick up in store.

Two payment providers are available for activation:
- PayPal
- Stripe

You can use one or both options for your PowerChord site.

Note: PayPal and Stripe processing questions and concerns must be handled with PayPal or Stripe support and cannot be handled by PowerChord.

*PayPal and Stripe are trademarks of their respective companies.

PayPal - How to Activate

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You can connect a PayPal Business account to STIHL Express and use it for online orders on your PowerChord site.

- Here are instructions for How to enable PayPal.

- To enable PayPal, you need your PayPal API credentials. Here are instructions for How to locate PayPal Credentials.

PayPal – Manual Capture with Two-Step Authorization

STIHL

When connecting PayPal to STIHL Express, you can select Automatic Capture or Manual Capture of funds, also known as two-step authorization.

- With Manual Capture, an authorization hold is placed on the customer's card for the purchase amount, allowing you time to check inventory and confirm the order before processing payment.

- **Manual Capture can help protect you against lost transaction fees if the order is not in stock.**

- It also allows you to check customer details to ensure the order does not look fraudulent.

- You have **three** days to accept the order and capture the funds or to cancel the order before the authorization falls off.

- Here are instructions for How to Process an Order.

Stihl – How to Activate

STIHL

You can connect a Stripe account to STIHL Express and use it for online orders on your PowerChord site.

- Here are instructions for How to enable Stripe.

- With Stripe, you have the option of various customizations to best fit your needs. The following pages will highlight these options.

STIHL® express
Activation
9 of 15

Stripe Payments

Processing Credit Cards with Stripe

Credit cards are automatically processed at time of the online order. This is explained to the customer during the customer checkout.

In order to process credit cards with Stripe on your PowerChord website, you will need to sign up for a Stripe Merchant account. Signing up is easy but requires you to have your banking information available so that deposits / debits can happen between your business and Stripe.

PLEASE NOTE: Stripe is a third party online payment provider that is integrated with the PowerChord platform and application. Your Stripe account and the PowerChord System are separate entities securely connected after YOU authorize that connection.

Multi-location Dealers: If you have multiple locations, and need to connect each location's site to Stripe, you can either create multiple stripe accounts OR you can use the same Stripe account and tie all locations together.

Click here for more information from Stripe.com.

You will need to complete this Activation Wizard for each location, and simply connect the individual or combined Stripe account to each location by clicking the "Connect to Stripe" button each time.

STIHL Inc., your STIHL Branch/Distributor, and PowerChord™ only facilitate the secure connection between a STIHL Dealer's Stripe.com account and the STIHL Dealer PowerChord website. STIHL Inc., your STIHL Branch/Distributor and PowerChord™ are not liable for any transactions between a Dealer's Stripe.com account and the customer.

By completing this step, please be advised that Stripe is secure and PCI DSS (Payment Card Industry Data Security Standard) compliant.

To sign up for a Stripe account or connect to an existing Stripe account, click the button below.

S Connect with Stripe

☑ I have read and understand the processes and policies outlined in this section.
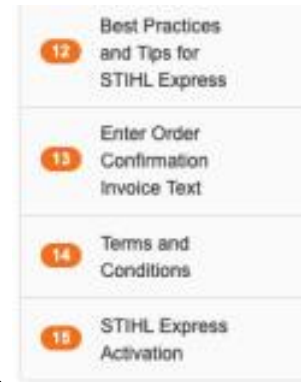
Previous   Save and Continue

Stripe – Manual Capture with Two-Step Authorization

When enabling Stripe, you can select Automatic Capture or Manual Capture of funds, also known as two-step authorization.

- With Manual Capture, an authorization hold is placed on the customer's card for the purchase amount, allowing you time to check inventory and confirm the order before processing payment.

- **Manual Capture can help protect you against lost transaction fees if the order is not in stock.**

- It also allows you to check over customer details to ensure the order does not look fraudulent.

- You have **seven (7)** days to accept the order and capture the funds or to cancel the order before the authorization falls off.

- To activate Manual Capture with Stripe, please follow these instructions: Activating Manual Capture for Stripe

- Here are instructions for How to Process an Order.

Stihl – Chargeback Protection

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Stripe Chargeback Protection

- Your sales are protected against fraudulent disputes, helping you to prevent losses.

- Whether or not the dispute is legitimate, Stripe will reimburse the disputed amount and waive dispute fees.

- There is an additional 0.4% transaction fee applied to each sale if you decide to enroll.

- In order to register for Chargeback Protection, you must activate Chargeback Protection within your Stripe account.

Please Note: This feature is unavailable for up to 6 months after you have activated Stripe for STIHL Express. This period is needed for risk assessment by Stripe.

To activate Stripe Chargeback Protection, please follow these instructions: How to activate Stripe chargeback protection
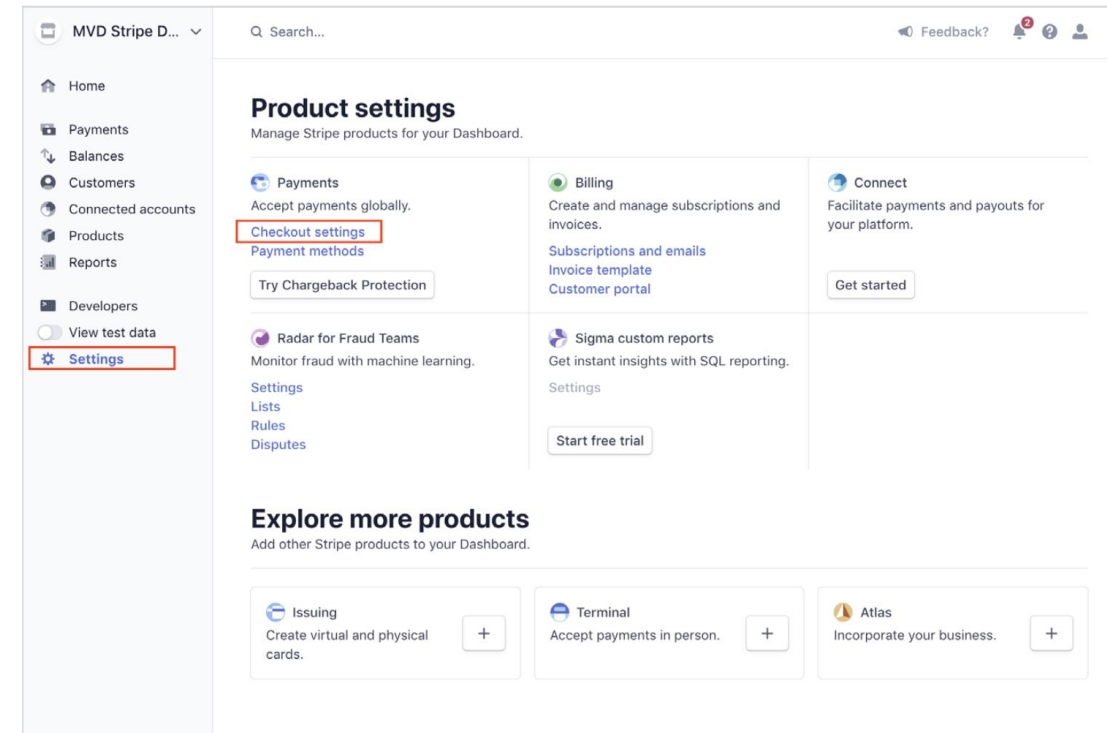
Stripe – Fraud Protection

Stripe Radar for Fraud Teams

- Activating the Radar for Fraud Teams gives you the ability to write additional "custom" rules that can benefit your specific business.

- It costs an additional $0.02 per transaction.

The step-by-step instructions will guide you on how to activate and implement Stripe Potential Fraud Radar Protection within your Stripe dashboard.
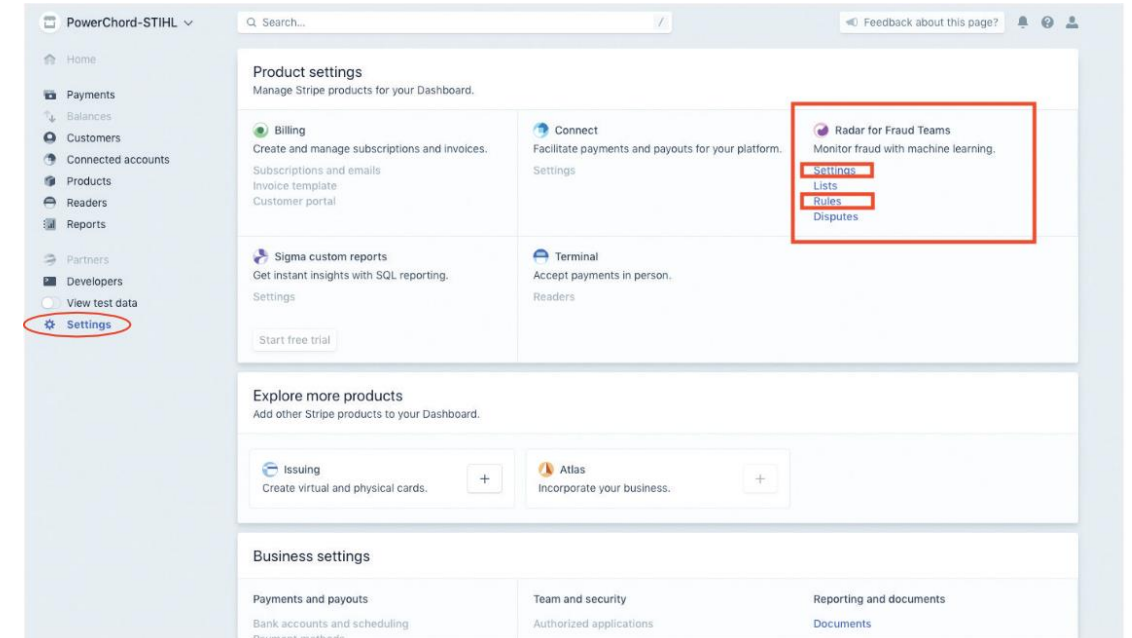
Stripe – Support

- **Public Business Name on your Stripe account-** Your "Public Business Name" listed on your Stripe account appears as part of the Stripe checkout. Ensure that your Public Business Name is correct so customers recognize your dealership and feel confident in who they are purchasing from. Please find instructions for How to Update Your Public Business Name in Stripe.

- **Contacting Stripe** - The most effective way to contact Stripe Support is by requesting a call via the Stripe Admin. A customer service representative will call you back in an average of 3 minutes.
Steps for How to Request a Call From Stripe Support.

- **Stripe FAQ** – Find frequently asked questions and answers in the Stripe FAQ documentation.

SETUP GUIDE - DELIVER FROM STORE

Deliver from Store

STIHL

- After signing up for STIHL Express (BOPIS), you are eligible to set up and activate Deliver From Store or Ship To Home.
- This document will walk you through the setup process and offer tips to consider when doing so.

Steps to Set Up Deliver From Store

1. Login to the PowerChord administration area.
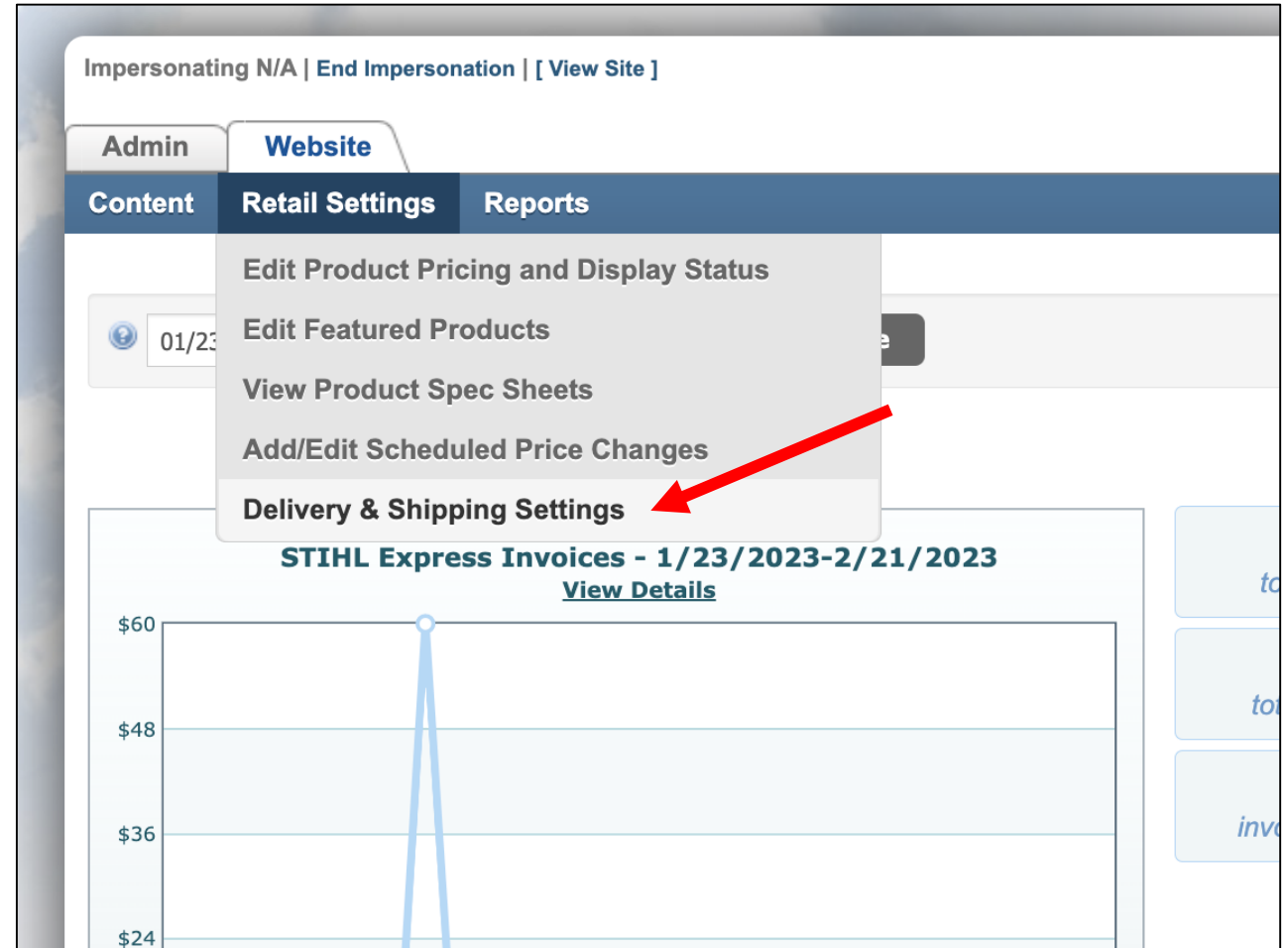2. Click on the Website tab
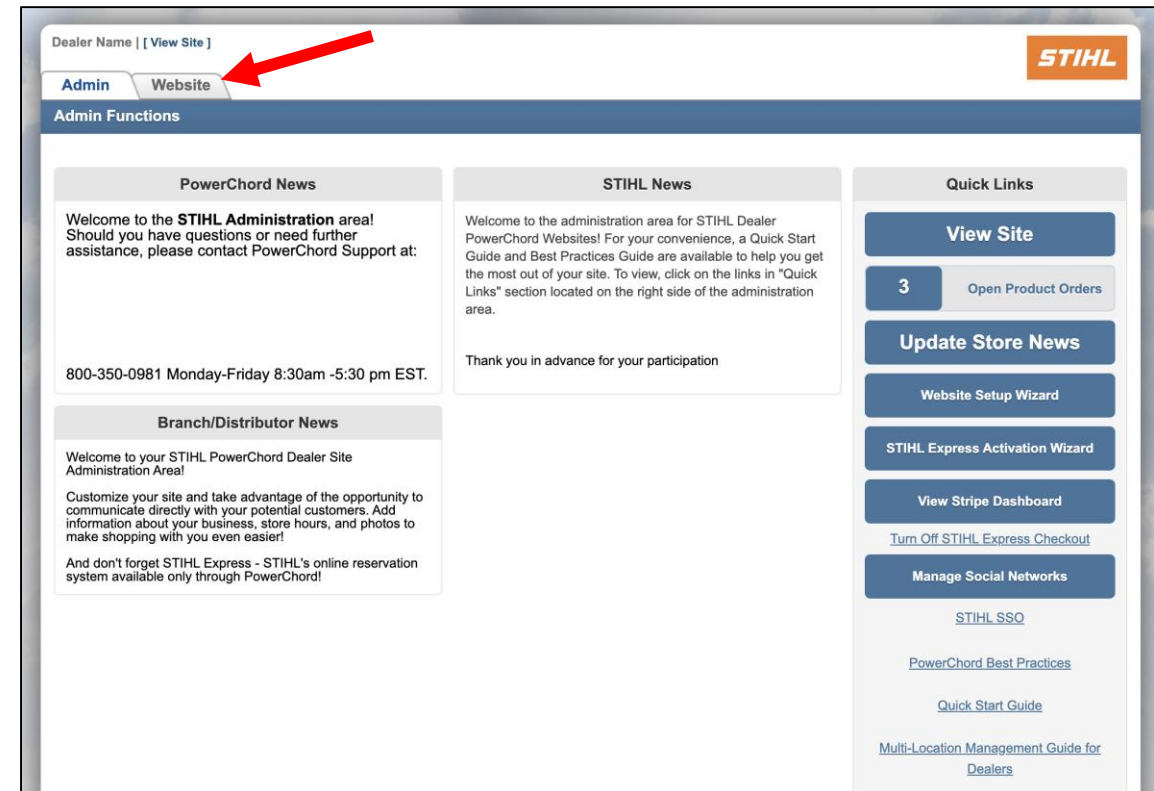
Steps to Set Up Deliver From Store – Continued

STIHL

3. Click on Retail Settings, and select Deliver From Store

**Note: This will take you to a new admin area. This new admin area is where you will establish settings for Deliver From Store AND process orders when they occur.

Steps to Set Up Deliver From Store – Continued

4. Select "Delivery & Shipping" in the left navigation pane, then select Settings.
5. Be sure you are on the "Deliver From Store" tab at the top navigation area.
6. Select the checkbox "Enable Deliver From Store" to begin configuring settings.

Steps to Set Up Deliver From Store – Continued

STIHL

7. If your locale requires you to charge sales tax on delivery fees, select this checkbox. It will charge your default tax rate, which is edited in the Tax Settings Editor.

Note:

- Dealers must follow municipal, city, state, and federal tax regulations.

- Initial tax solution will be localized

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Configuration Settings – Deliver From Store

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Delivery Area and Delivery Zone

- This is where you will define your delivery zone(s) or areas to which you will deliver STIHL products as well as the associated delivery fees.

- Delivery fees are based on the Shopping Cart Subtotal (all products combined).

- There are two methods to creating delivery zones:

  1. Using Zip Codes – allows you to specify which zip codes will be included in a particular delivery zone.

     **Note: you can use an asterisk (*) modifier to include all surrounding zip codes. Ex: 637* will include all neighboring zip codes with the prefix 637.

  2. Using a Radius – allows you to establish a radius from your store location for different delivery zones. The radius entered is calculated based on the shortest driving distance (using Google Maps).

- Choose a method. Click <u>Using Zip Codes</u> (Page 19) or <u>Using a Radius</u> (Page 20) to view instructions on how to set up a maximum of 5 unique shipping zones.

- Once finished with configuring your settings for Delivery Zones, **click SAVE** before moving on.

Delivery Area

Define your delivery zones

- ⦿ Using Zip Codes
- ◯ Using a Radius

Delivery Zone

Name
Zone1

Postal Codes
63701 ✕   637* ✕

Enter Postal Codes separated by a comma. To include a range of Postal Codes, you may add an asterisk (*) after the characters that begin the range.   2 / 100

Rates

Minimum Order Total
$ 100

Delivery Fee
$ 20

ADD A RATE

Delivery Information
We will contact you within 1-2 business days after receiving your order to schedule delivery and/or discuss any changes to your order. Product availability varies and may potentially delay delivery.

This will appear during checkout and in the order confirmation.   199 / 250

Set Up Delivery Zone – Using Zip Codes Method

STIHL

1. To create a zone, name your first zone. You may add up to 5 delivery zones.

2. Enter the zip codes you wish to include in this first zone.

3. Set up the delivery fee for the minimum order total. You may add up to 5 rate tiers per zone.

If you selected the **Zip Code Method**,

If you prefer the **Radius Method**,

Delivery Zone

Name
Zone1

Postal Codes
[39307 ✕] [393* ✕]

Enter Postal Codes separated by a comma. To include a range of Postal Codes, you may add an asterisk (*) after the characters that begin the range.   2 / 100

Rates

Minimum Order Total	Delivery Fee	
$ 100	$ 20	🗑
$ 100.01	$ 10	🗑
$ 200	$ 0 FREE	🗑

ADD A RATE

Set Up Delivery Zone – Using a Radius Method

1. To create a zone, name your first zone. You may add up to 5 delivery zones.

2. Enter radius (in miles) you wish to include in this first zone. The radius entered is calculated based on the shortest driving distance (using Google Maps).

3. Set up the delivery fee for the minimum order total. You may add up to 5 rate tiers per zone.

Note: System defaults to NOT include neighboring states. Should your dealership be located near a state line, you have the option to deliver to neighboring states in that zone ONLY if this checkbox is selected.

Delivery Area

Define your delivery zones

◯ Using Zip Codes

⦿ Using a Radius

☐ Include neighboring states

Delivery Zone

Name
Zone1

Radius
20   mi

Calculated as the shortest Driving Distance between your location and the customer's address.

Rates

Minimum Order Total
$ 100

Delivery Fee
$ 20

Minimum Order Total
$ 100.01

Delivery Fee
$ 10

ADD A RATE

Set Up Delivery Zone – Both Methods

STIHL

4. The Delivery Information text box is a customized message you
    can display to end-customers when they enter their delivery
    address during checkout. This message for each delivery zone will
    appear in specific places during the shopping experience for your
    customers. You can see these locations on the next slide.

    Suggested text:

    *"We will contact you within 1-2 business days after receiving your
    order to schedule delivery and/or discuss any changes to your order.
    Product availability varies and may potentially delay delivery.*

    *Your order will be delivered by a person from our team, who will
    provide a product safety demonstration for you. There must be an
    adult over the age of 18 present at the time of delivery to receive the
    order and demonstration."*

Delivery Information

We will contact you within 1-2 business days after receiving your
order to schedule delivery and/or discuss any changes to your order.
Product availability varies and may potentially delay delivery.

Your items will be delivered by a person from our team, who will

This will appear during checkout and in the order confirmation.   434 / 500

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5. Once finished with configuring your settings for Delivery Zones, **click SAVE** before moving on.

Where Delivery Zone Notification Text Appears

STIHLusa.com & STIHL PowerChord Website
Product Details Page
Delivery Address Entry

STIHL Express Checkout

Tax Settings – Deliver From Store

1. Select "Tax" in the left navigation pane, then select "Tax Settings."
2. The tax information entered in the STIHL Express activation wizard will show by default, but you can add additional states by clicking the button labeled "Add State."

Tax Settings – Deliver From Store - Continued

3. You can also add individual zip codes by clicking the drop down on an existing state.
4. Click "Add Zip Code" and input the appropriate zip code and tax rate in the slide out screen.

How to Set Specific Products for Delivery

STIHL

If you are setting up Deliver From Store for the first time, CLICK HERE to skip to STEP 4 (Page 24).

1. Login to the PowerChord administration area.

2. Click on the Website tab

3. Click on Retail Settings, and select Deliver From Store

   Note: This will take you to a new admin area. This new admin area is where you will establish settings for Deliver From Store AND process orders when they occur.
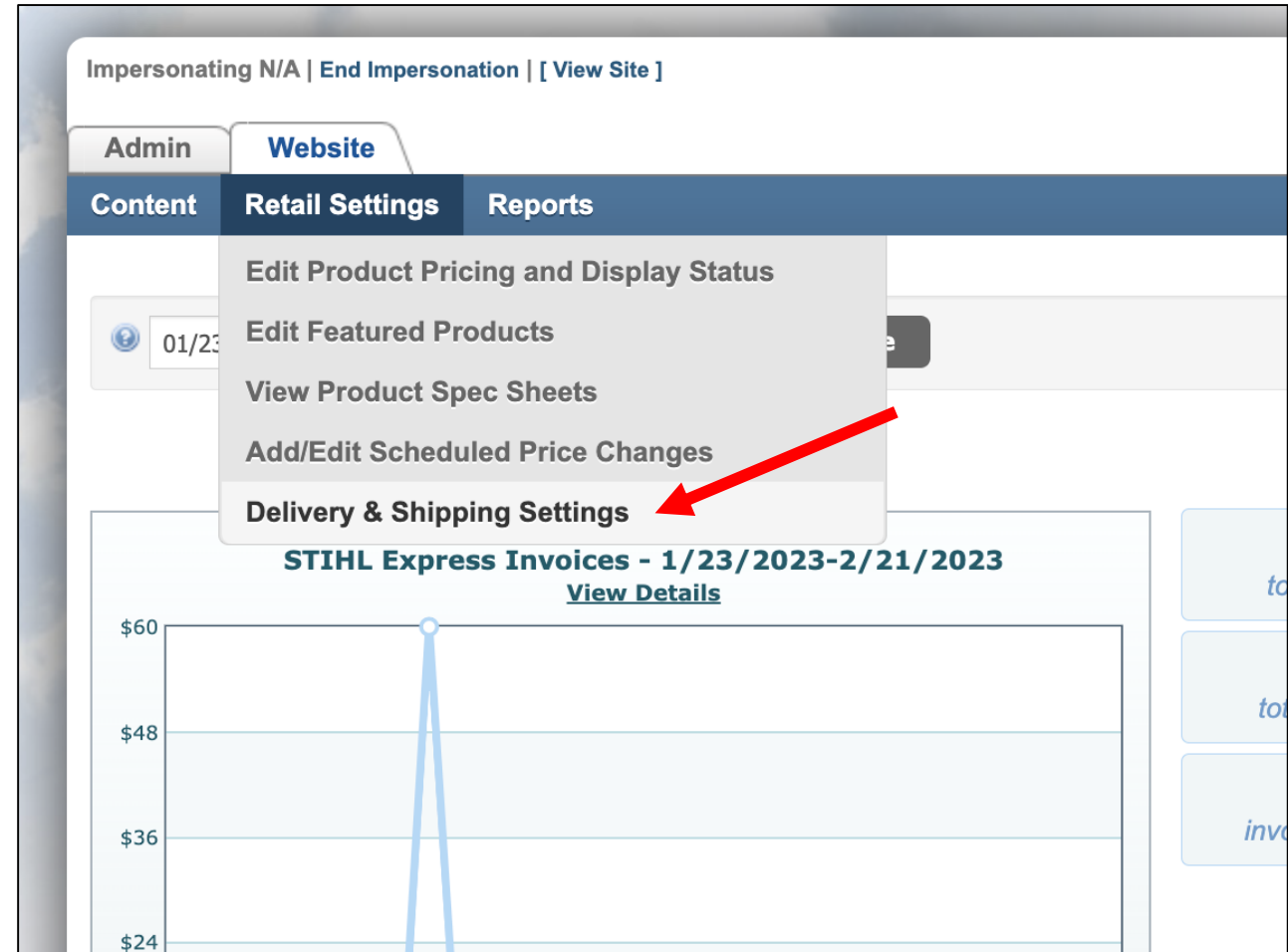
How to Set Specific Products for Delivery – Continued

4. Select "Delivery & Shipping" in the left navigation pane or mobile menu.

5. Select Products in the navigation menu. Here you can select all of the products (and product variants) you wish to deliver. The products in this list are determined by your STIHL Branch / Distributor.

6. To enable a product(s) for delivery, select the checkbox for product(s), then **click SAVE.**
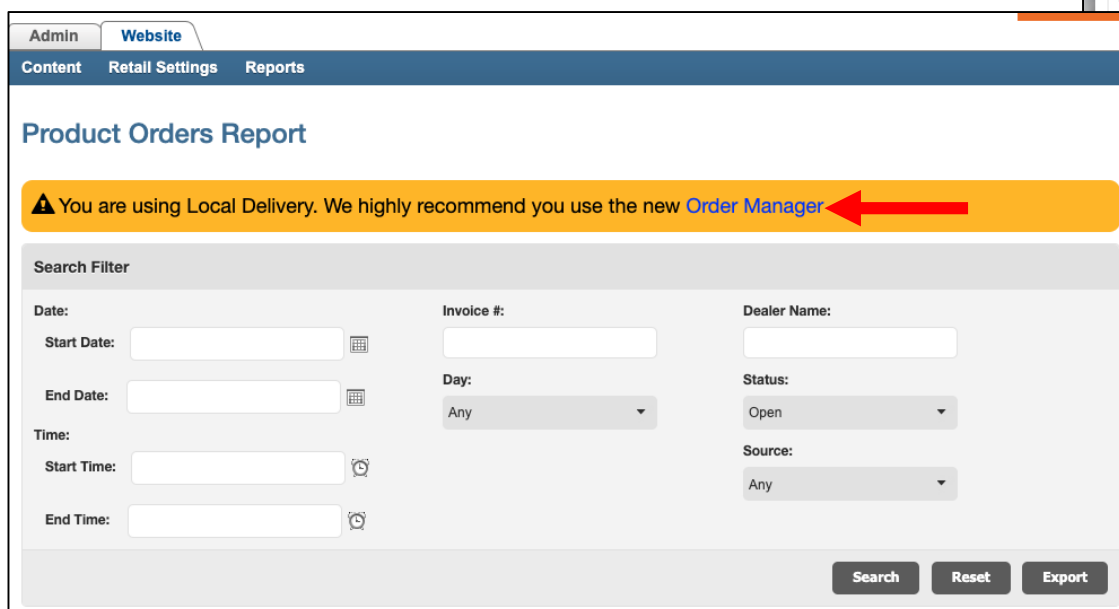
Tip: To enable entire categories of products, search by the prefix of the product group to display all products in that category.

How to Process a Deliver From Store Order

1. Visit "Open Product Orders" in your PowerChord Site admin.

2. If you offer Deliver From Store, we highly recommend using the new Order Manager Admin option.

How to Process a Deliver From Store Order

STIHL

3. At the top of the page, you will see a number of search filters to use if needed. You can also export orders here.

How to Process a Deliver From Store Order

4. View an order by clicking the order number. Determine if you are able to fulfill the order.

5. If you are able to fulfill the order, click on "Actions" and select "Process Order." If you are not able to fulfill the order, see section HERE (page 31) on "How to Manually Cancel an Order and Payment."

How to Process a Deliver From Store Order

STIHL

7. In the Process Order slide-out screen, ensure the "Amount to Capture" is the correct amount. The amount will always default to the total transaction amount. Select the processing status.

   If "In Progress" is selected, this means you captured the funds and are waiting on the product to be delivered to your store for delivery/pickup.

   Note: You have an option to add an "Internal Note" on the order for your own reference. This note will only be seen by you and **NOT the customer.

   Select **PROCESS ORDER** to save order status.

Process Order SX1199-107 ✕

Capture Funds

Amount to Capture
$ 1218.29

Processing

Transition Order Status To ▼

Internal Note

You can optionally add an internal note to the order. This will be saved in the system and will not be sent to the customer.

Note

0 / 255

PROCESS ORDER

CANCEL

Process Order SX1199-108 ✕

Capture Funds

Amount to Capture
$ 619.15

Processing

Transition Order Status To

In Progress

Ready For Delivery

Internal Note

You can optionally add an internal note to the order. This will be saved in the system and will not be sent to the customer.

Note

0 / 255

PROCESS ORDER

CANCEL

How to Process a Deliver From Store Order

8. When "Ready for Delivery" is selected, this means the item is ready for pickup **OR** delivery.

   Here you have an option to send the customer a notification message and add a custom note that the customer can see within that email.
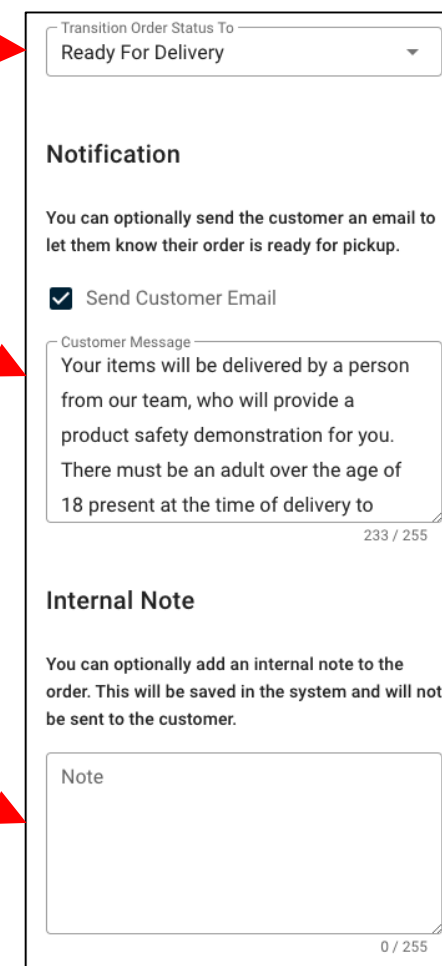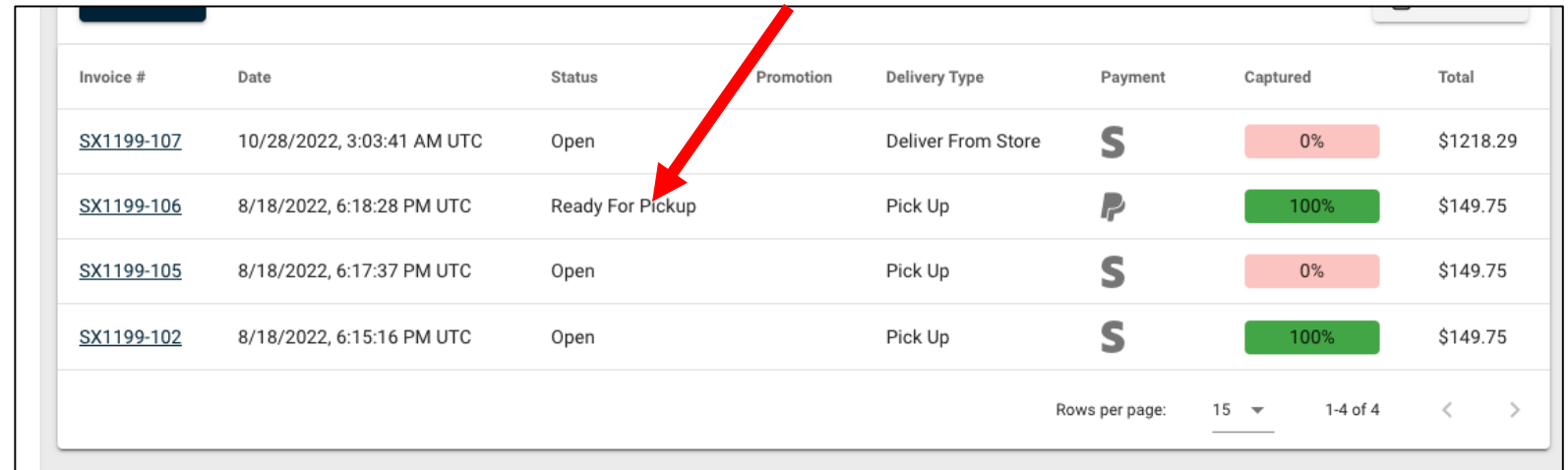
   Suggested text:

   "Your items will be delivered by a member of our team, who will provide a product safety demonstration for you. There must be an adult over the age of 18 present at the time of delivery to receive the order and demonstration."

   You also have an option to add an "Internal Note" on the order for your own reference. This note will only be seen by you and **NOT** the customer.

   Select **PROCESS ORDER** to save order status.

   The customer will now get an email notification and a text notification prompting them to either pick up their order or informing them that delivery is ready. For Deliver From Store orders, you MUST arrange the delivery time and date with them.

How to Process a Deliver From Store Order

9. On your "Open Product Orders" screen you will see the order status "Ready For Pickup" or "Ready for Delivery" depending on the order type.

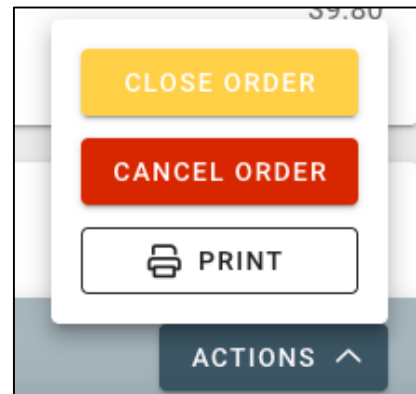   Click on the order details to close the order.

9. Once on the order details screen, click **ACTIONS** and select **CLOSE ORDER.**

10. The order has been processed and closed!

How to Manually Cancel an Order and Payment

1. If you cannot fulfill the order and need to cancel it, find the order that you wish to cancel, and select **CANCEL ORDER.**

How to Manually Cancel an Order and Payment

STIHL

2. In the "Cancel Order" slide out, confirm that you do not wish to capture the funds for this order by checking the the "Void Authorization" box.

3. Select the notification box to email your customer that the order was cancelled.

4. Type a customer message explaining why their order was cancelled.

"We're sorry to inform you that your order has been cancelled. We apologize for any inconvenience this may cause. If you have questions, please contact us at 555-555-5555 or dealer@dealer.com."

Retail best practices encourage a phone call to offer an explanation and an opportunity for the customer to determine next steps.

Note: This message will be included in the customer notification email. You can also add an internal note for your own reference. The internal note will only be seen by you and **NOT the customer.

4. Select **CANCEL ORDER.**

How to Process a Deliver From Store Order - Refunds

STIHL

PayPal and Stripe handle refunds differently.

1. **PayPal**
   When canceling a PayPal order that has already been captured, a list of captures that have been made against the order will appear. You will need to refund each of them individually by entering the amount in the corresponding box and clicking **REFUND.**

2. **Stripe**
   When canceling a Stripe order that has already been captured, you will need to refund the amount. Click **CANCEL ORDER** to confirm or enter "Amount to Refund."

View Report of STIHL Express Orders

You can export your online orders report for sales tax, accounting purposes, analysis, etc.

How to Process a Deliver From Store Order

STIHL

Helpful Tips

As a dealer, you have the ability to cancel an order even if you are not opted in to the "Manual Capture" feature.

If the order was automatically captured, you will be able to refund the full amount to the customer.

**NOTE: Auto-captured orders with Stripe are subject to non-refundable processing fees.

Order Status:

Status	Description
Open	The order has been created and is waiting for dealer to process.
Ready For Pickup	The order has been acknowledged and the funds have been captured.
Closed	The order is complete.
In Progress	The order has been accepted and payment has been captured. Customer is waiting for product to be delivered to store and notified when order is "Ready For Pickup."

Captured Icons:

Icon	Description
✔	The funds have been fully captured. ROPUS and Automatic Capture orders will always display this icon.
✔	Funds we're partially captured. On Manual Capture orders dealers have the ability to capture partial funds.
⚠	Funds have not been captured for this order yet.
⊖	Funds cannot be captured for this order. This will only show for ROPUS orders.

Status Actions:

Status	Description
Open	Ready For Pickup, Close Order, Cancel Order, View Details, In Progress
In Progress	Ready For Pickup, Close Order, Cancel Order, View Details
Ready For Pickup	Close Order, Cancel Order, View Details
Closed	View Details
Cancelled	View Details
Any Status (TM/BD Only)	Invalidate, View Details

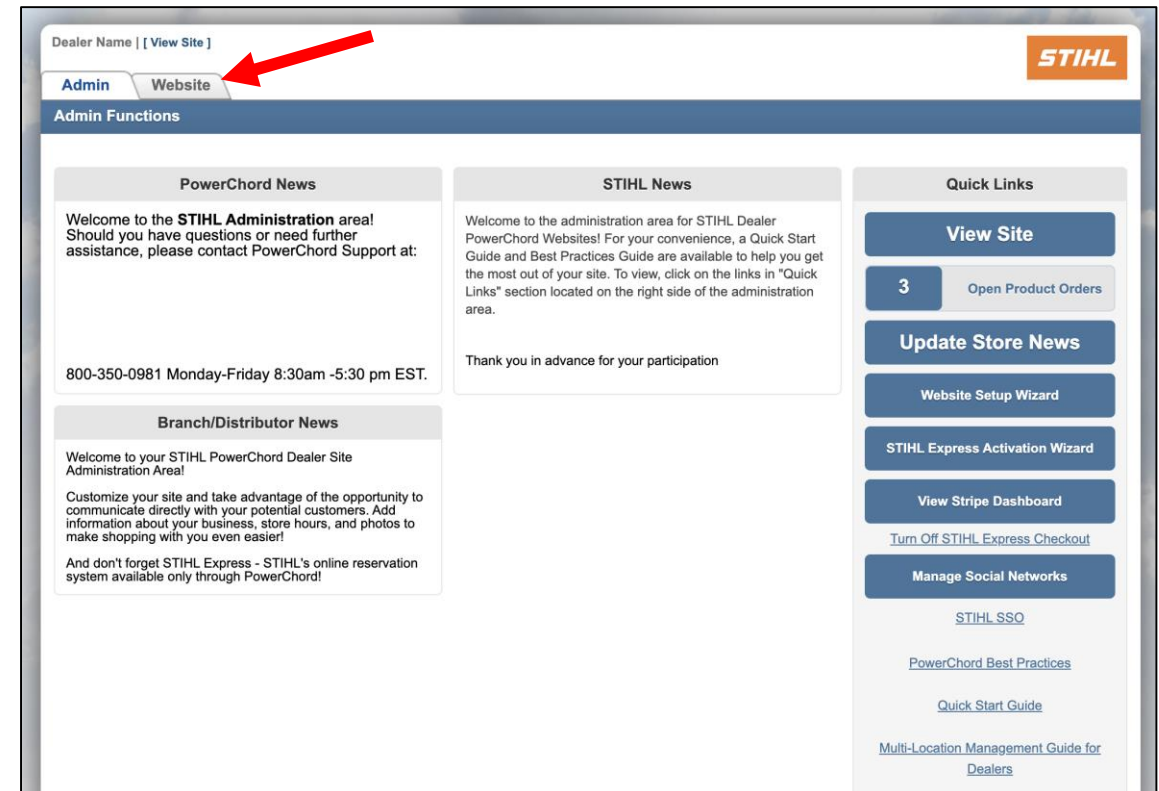# SETUP GUIDE - SHIP TO HOME

STIHL

Ship To Home

- After signing up for STIHL Express (BOPIS), you are eligible to set up and activate Ship To Home.
- This document will walk you through the setup process and offer tips to consider when doing so.

Steps to Set Up Ship To Home

1. Login to the PowerChord administration area.

2. Click on the Website tab.

Steps to Set Up Ship To Home – Continued

![STIHL]

3. Click on Retail Settings, and select "Delivery & Shipping Settings"

**Note: This will take you to a new admin area. This new admin area is where you will establish settings for Ship To Home AND process orders when they occur.

Steps to Set Up Ship To Home – Continued

STIHL

4. Select "Delivery & Shipping" in the left navigation pane, then select "Settings."
5. Click on "Ship To Home" on the right side of the pane.
6. Select the checkbox "Enable Ship To Home" to begin configuring settings.

Steps to Set Up Deliver From Store – Continued

7. If your locale requires you to charge sales tax on delivery fees, select this checkbox. It will charge your default tax rate, which is edited in the Tax Settings Editor.

Configuration Settings – Ship To Home

STIHL

Taxes

- If your locale requires you to charge sales tax on delivery fees, select this checkbox. It will charge your default tax rate, which is edited in the STIHL Express Wizard or in the Tax Settings editor.

Note:
- Dealers must follow municipal, city, state, and federal tax regulations.

- Initial tax solution will be localized

- STIHL will review analytics and dealer feedback to determine if broad shipping options on PowerChord captures the requisite opportunity to merit associated development and licensing costs or if third party solution will be necessary.

Configuration Settings – Ship To Home – Continued

STIHL

Shipping Area and Shipping Zone

- This is where you will define your shipping zone(s) or areas to which you will ship STIHL products, as well as the associated shipping fees.

- Shipping fees are based on the Shopping Cart Subtotal (all products combined).

- There are two methods to creating shipping zones:

  1. Using Zip Codes – allows you to specify which zip codes will be included in a particular shipping zone.

     **Note: you can use an asterisk (*) modifier to include all surrounding zip codes. Ex: 637* will include all neighboring zip codes with the prefix 637.*

  2. Using a Radius – allows you to establish a radius from your store location for different shipping zones. The radius entered is calculated based on the shortest driving distance (using Google Maps).

- Choose a method. Click Using Zip Codes (Page 24) or Using a Radius (Page 43) to view instructions on how to set up a maximum of 5 unique shipping zones.

- Once finished with configuring your settings for Shipping Zones, **click SAVE** before moving on.

Set Up Shipping Zone – Using Zip Codes Method

STIHL

1. To create a zone, name your first zone. You may add up to 5 shipping zones.

2. Enter the zip codes you wish to include in this first zone.

3. Set up the shipping fee for the minimum order total. You may add up to 5 rate tiers per zone.

If you selected the **Zip Code Method**, CLICK HERE to continue (Page 44).

If you prefer the **Radius Method**, CLICK HERE to continue (Page 43).

Shipping Zone

Name
Zone 1

Postal Codes
39307 ✕   393* ✕

Enter Postal Codes separated by a comma. To include a range of Postal Codes, you may add an asterisk (*) after the characters that begin the range.   2 / 100

Rates

Minimum Order Total
$ 100

Shipping Fee
$ 20

Minimum Order Total
$ 100.01

Shipping Fee
$ 10

Minimum Order Total
$ 200

Shipping Fee
$ 0   FREE

ADD A RATE

Set Up Shipping Zone – Using a Radius Method

1. To create a zone, name your first zone. You may add up to 5 shipping zones.

2. Enter radius (in miles) you wish to include in this first zone. The radius entered is calculated based on the shortest driving distance (using Google Maps).

3. Set up the shipping fee for the minimum order total. You may add up to 5 rates tiers per zone.

Note: System defaults to NOT include neighboring states due to differing tax codes. Should your dealership be located near a state line, you have the option to deliver to neighboring states in that zone ONLY if this checkbox is selected.

Shipping Area

Define your shipping zones

○ Using Zip Codes
◉ Using a Radius

☐ Include neighboring states

Shipping Zone

Name
Zone 1

Radius
20   mi

Calculated as the shortest Driving Distance be-
tween your location and the customer's
address.

Rates

Minimum Order Total
$ 100

Shipping Fee
$ 20   🗑

Minimum Order Total
$ 100.01

Shipping Fee
$ 10   🗑

ADD A RATE

Set Up Shipping Zone – Either Method

STIHL

4. The Shipping Information text box is a customized message you can display to end-customers when they enter their shipping address at checkout. This message for each shipping zone will appear in specific places during the shopping experience for your customers. You can see these locations on the next slide.

Suggested text:
"A dealer representative will contact you with your order status & tracking information, typically within 1-2 business days.

We are happy to provide a free in-store product demonstration for all STIHL products."

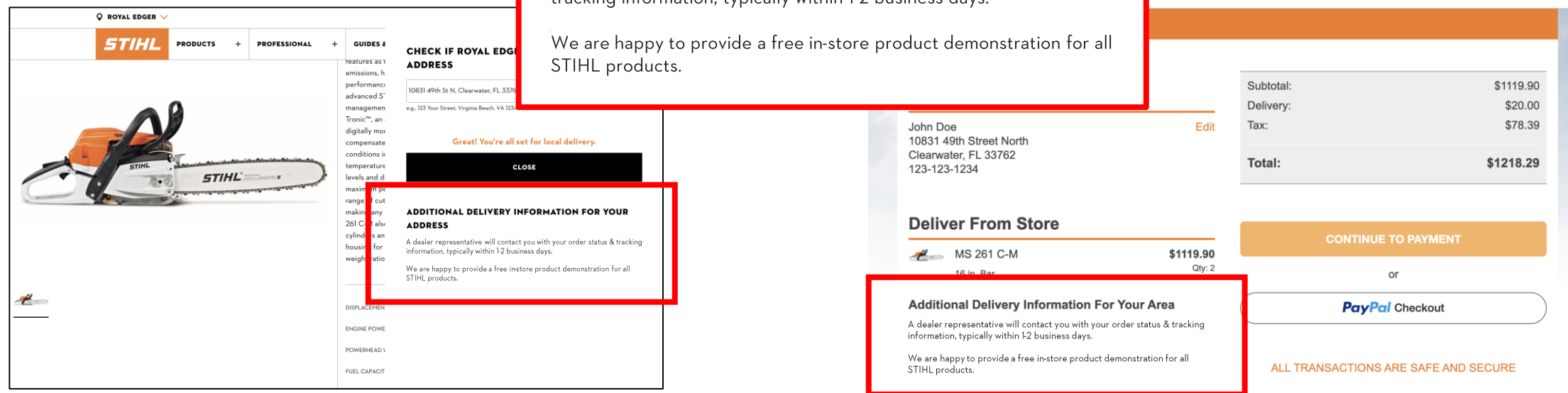5. Once finished with configuring your settings for Shipping Zones, **click SAVE** before moving on.

Shipping Information
A dealer representative will contact you with your order status & tracking information, typically within 1-2 business days.

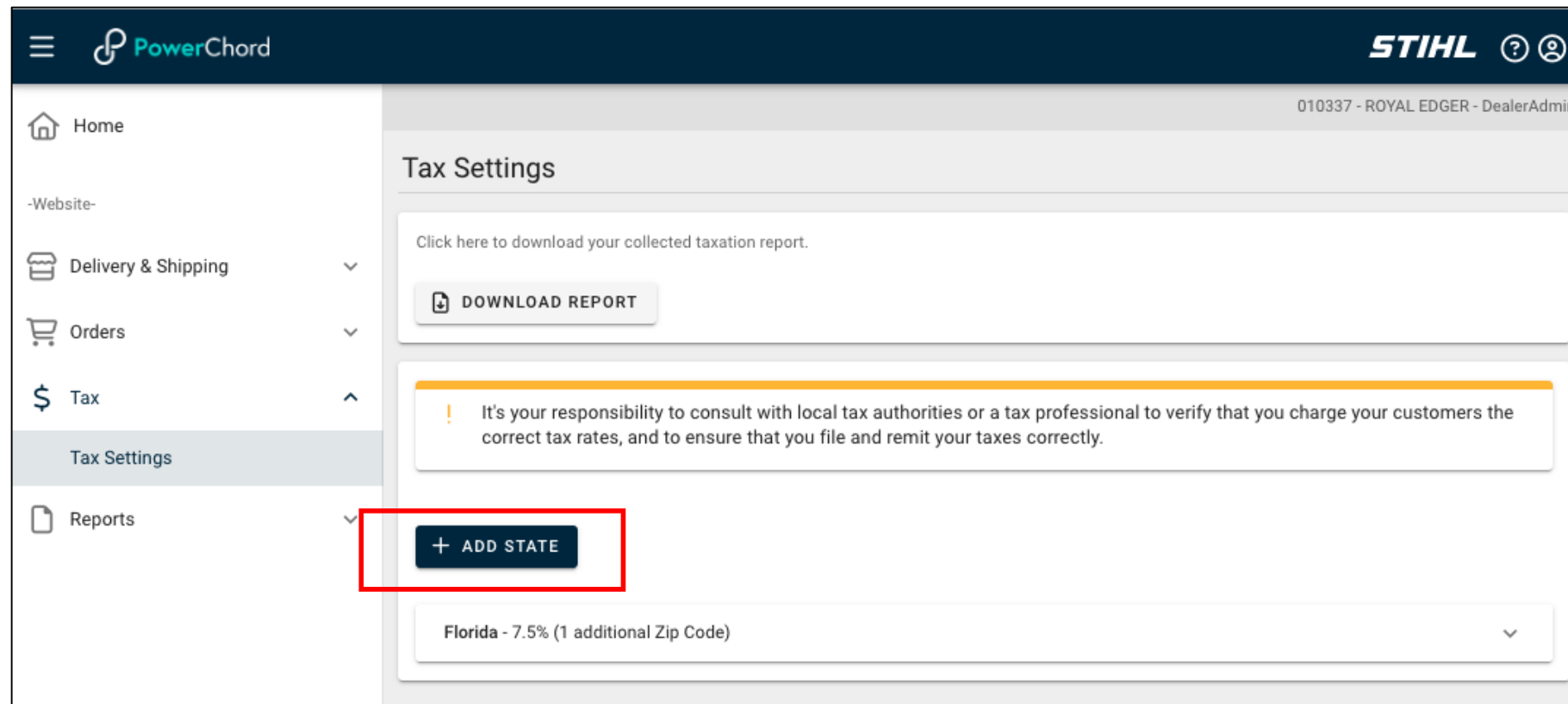We are happy to provide a free in-store product demonstration for all STIHL products.

This will appear during checkout and in the order confirmation.   210 / 500

Where Shipping Zone Notification Text Appears

Additional Delivery Information For Your Area

A dealer representative will contact you with your order status & tracking information, typically within 1-2 business days.

We are happy to provide a free in-store product demonstration for all STIHL products.

STIHLusa.com & STIHL PowerChord Website
Product Details Page
Delivery Address Entry

STIHL Express Checkout

Tax Settings – Ship To Home

1. Select "Tax" in the left navigation pane, then select "Tax Settings."
2. The tax information entered in the STIHL Express activation wizard will show by default, but you can add additional states by clicking the button labeled "Add State."

Tax Settings – Ship To Home - Continued

3. You can also add individual zip codes by clicking the drop down on an existing state.
4. Click "Add Zip Code" and input the appropriate zip code and tax rate in the slide out screen.

How to Set Specific Products for Shipping

If you are setting up Ship To Home for the first time, CLICK HERE to skip to STEP 4 (Page 47).

1. Login to the PowerChord administration area.

2. Click on the Website tab

3. Click on Retail Settings, and select "Delivery & Shipping Settings"

   Note: This will take you to a new admin area. This new admin area is where you will establish settings for Ship To Home AND process orders when they occur.
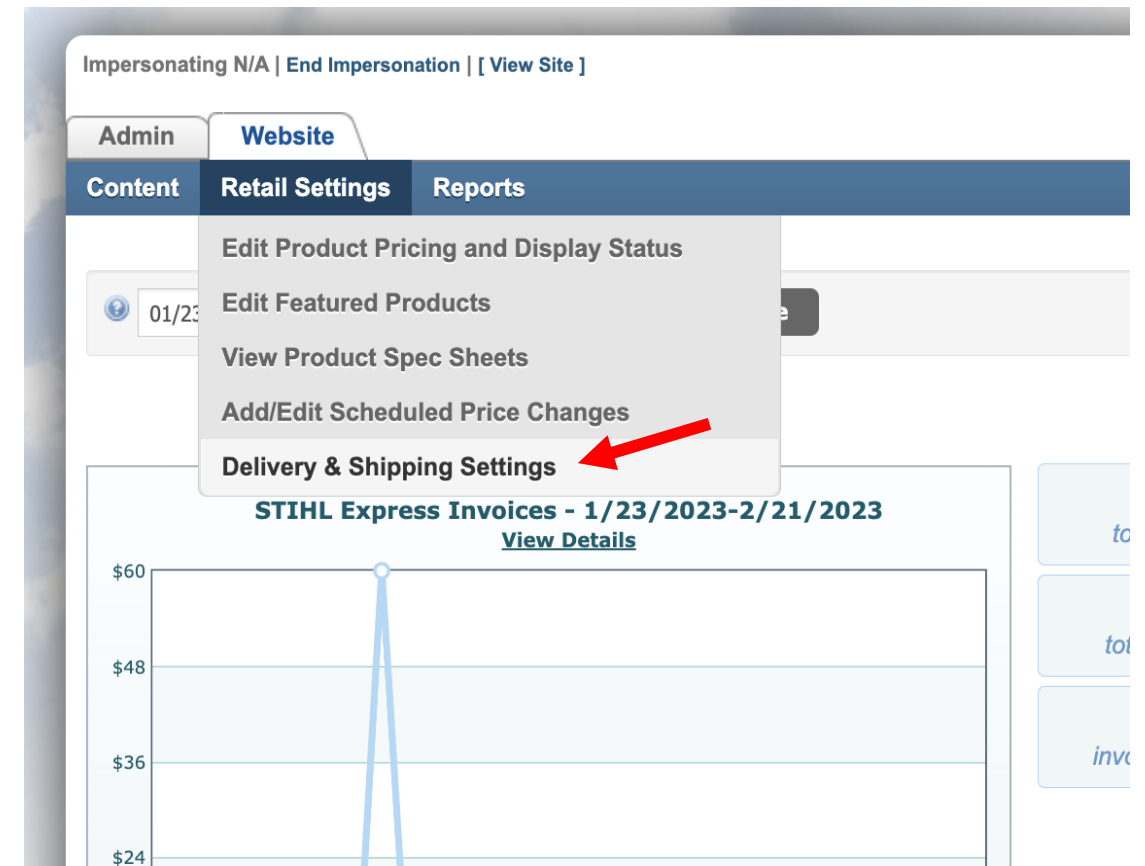
How to Set Specific Products for Delivery – Continued

4. Select "Delivery & Shipping" drop-down in the left navigation pane or mobile menu.

5. Be sure you are on the "Ship To Home" tab on the upper right part of the screen.

6. Select "Products" in the navigation menu. Here you can select all the products (and product variants) you wish to ship. The products in this list are determined by your STIHL Branch / Distributor.

7. To enable a product(s) for Ship To Home, select the checkbox for product(s), then **click SAVE.**

How to Process a Ship To Home Order

1. Visit "Open Product Orders" in your PowerChord Site admin.

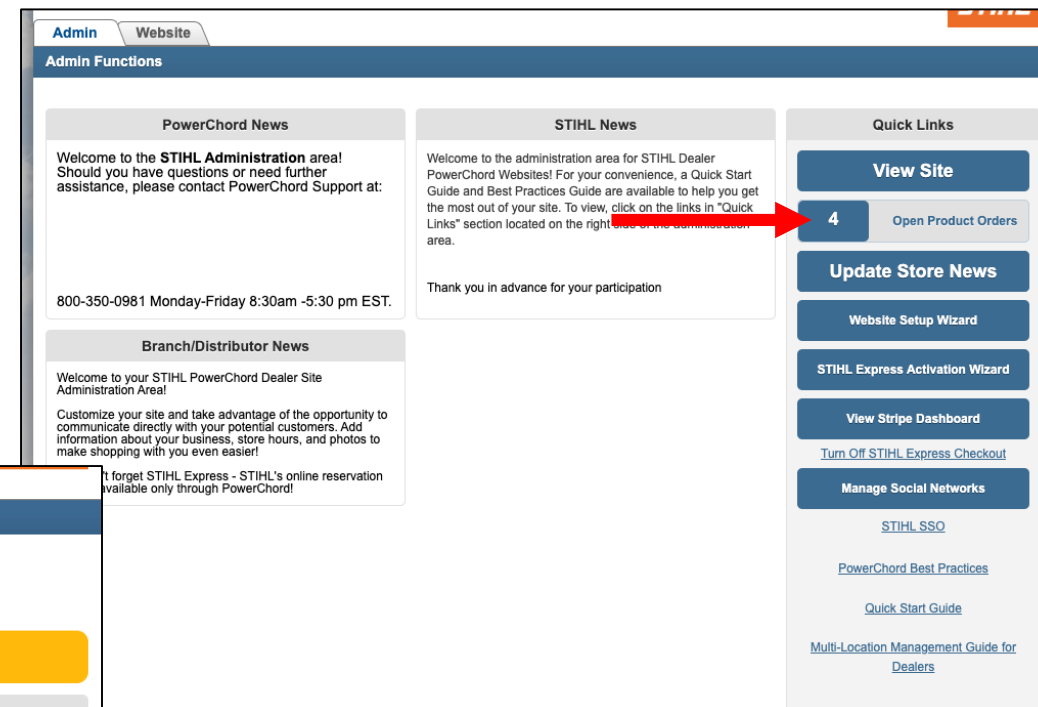2. If you offer Ship To Home, we highly recommend using the new "Order Manager" Admin option.

How to Process a Ship To Home Order

STIHL

3. At the top of the page, you will see a number of search filters to use if needed. You can also export orders here.

How to Process a Ship To Home Order

4. View an order by clicking the order number. Determine if you can fulfill the order.

5. If you can fulfill the order, click on "Actions" and select "Process Order." If you are not able to fulfill the order, see section HERE (Page 54) on "How to Manually Cancel an Order and Payment."

How to Process a Ship To Home Order

STIHL

7. In the Process Order slide-out screen, ensure the "Amount to Capture" is the correct amount. The amount will always default to the total transaction amount. Select the processing status.

   If "In Progress" is selected, this means you captured the funds and are waiting on the product to be delivered to your store for shipping.

   Note: You have an option to add an "Internal Note" on the order for your own reference. This note will only be seen by you and **NOT the customer.

   Select **PROCESS ORDER** to save order status.

How to Process a Ship To Home Order

STIHL

8. When "Ready for Shipping" is selected, this means the item is ready for pickup **OR** shipping.
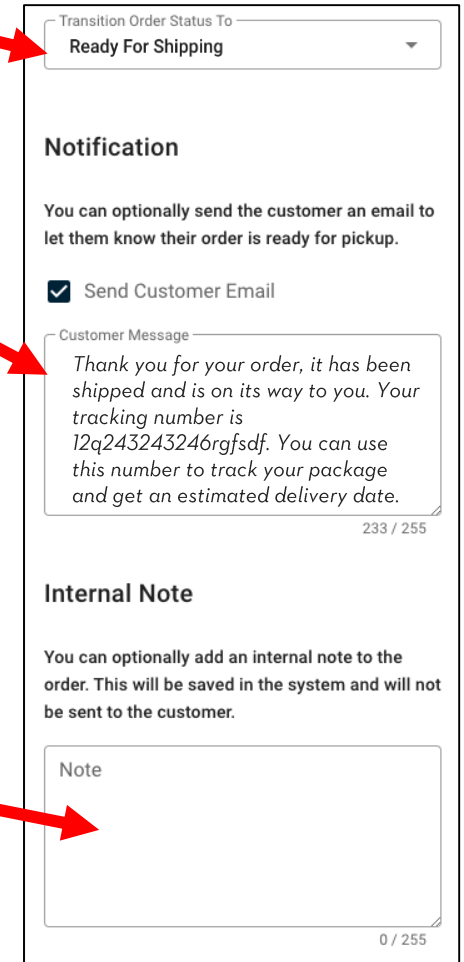
   Here you have an option to send the customer a notification message and add a custom note that the customer can see within that email. This is a good place to include tracking information. Suggested text:

   "Thank you for your order, it has been shipped and is on its way to you. Your tracking number is [INSERT TRACKING NUMBER HERE]. You can use this number to track your package and get an estimated delivery date."

   You also have an option to add an "Internal Note" on the order for your own reference. This note will only be seen by you and **NOT** the customer.

   Select **PROCESS ORDER** to save order status.

   The customer will now get an email notification and a text notification with this information.

How to Process a Ship To Home Order

STIHL

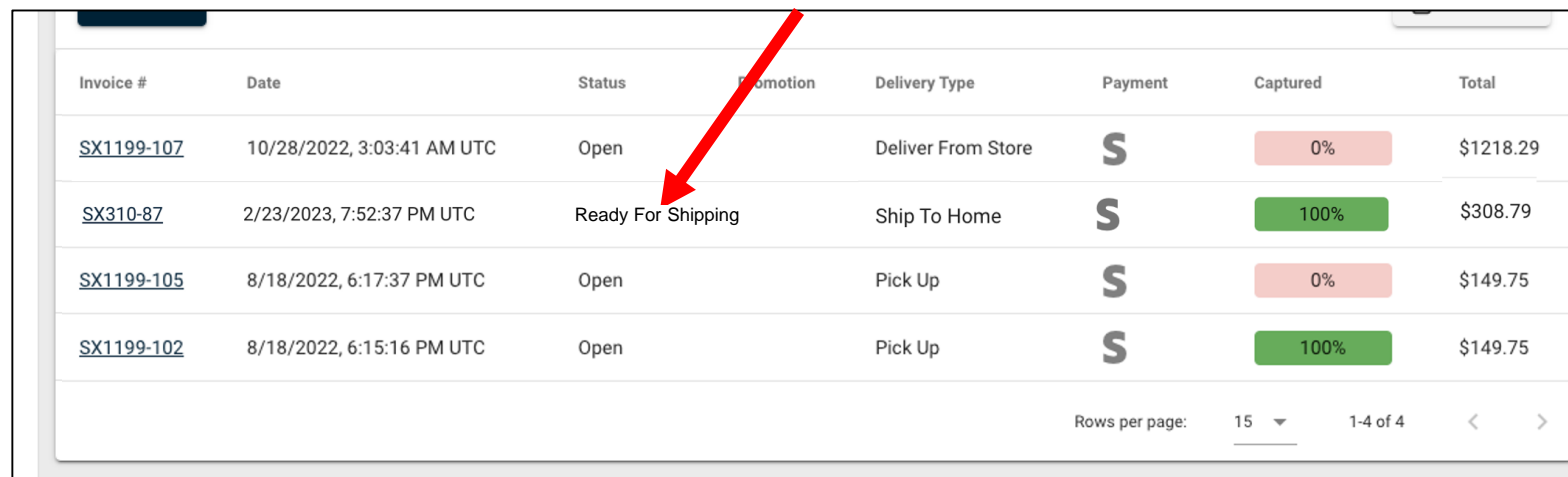9. On your Open Product Orders screen you will see the order status "Ready For Pickup" or "Ready for Shipping" depending on the order type.

   Click on the order details to close the order.

Invoice #	Date	Status	Promotion	Delivery Type	Payment	Captured	Total
SX1199-107	10/28/2022, 3:03:41 AM UTC	Open		Deliver From Store	S	0%	$1218.29
SX310-87	2/23/2023, 7:52:37 PM UTC	Ready For Shipping		Ship To Home	S	100%	$308.79
SX1199-105	8/18/2022, 6:17:37 PM UTC	Open		Pick Up	S	0%	$149.75
SX1199-102	8/18/2022, 6:15:16 PM UTC	Open		Pick Up	S	100%	$149.75

Rows per page: 15 ▾   1-4 of 4   <   >

9. Once on the order details screen, click **ACTIONS** and select **CLOSE ORDER.**

10. The order has been processed and closed!

CLOSE ORDER

CANCEL ORDER

🖶 PRINT

ACTIONS ∧

How to Manually Cancel an Order and Payment

1. If you cannot fulfill the order and need to cancel it, find the order that you wish to cancel, and select **CANCEL ORDER.**

How to Manually Cancel an Order and Payment

2. In the "Cancel Order" slide out, confirm that you do not wish to capture the funds for this order by checking the "Void Authorization" box.

3. Select the notification box to email your customer that the order was cancelled.

4. Type a customer message explaining why their order was cancelled. Suggested text:

   "We're sorry to inform you that your order has been cancelled. We apologize for any inconvenience this may cause."

   Note: This message will be included in the customer notification email. You can also add an internal note for your own reference, which will only be seen by you and **NOT the customer.

   Retail best practices encourage a phone call to offer an explanation and an opportunity for the customer to determine next steps.

5. Select **CANCEL ORDER.**

How to Process a Ship To Home Order - Refunds

PayPal and Stripe handle refunds differently.

1. **PayPal**
   When cancelling a PayPal order that has already been captured, a list of captures that have been made against the order will appear. You will need to refund each of them individually by entering the amount in the corresponding box and clicking **REFUND.**

2. **STRIPE**
   When cancelling a Stripe order that has already been captured, you will need to refund the amount. Click **CANCEL ORDER** to confirm or enter "Amount to Refund."

View Report of STIHL Express Orders

You can export your online orders report for sales tax, accounting purposes, analysis, etc.

How to Process a Ship To Home Order

Helpful Tips

As a dealer, you can cancel an order even if you are not opted in to the "Manual Capture" feature.

If the order was automatically captured, you will be able to refund the full amount to the customer.

**NOTE: Auto-captured orders with Stripe are subject to non-refundable processing fees.

Helpful Tips

Order Status:

Status	Description
Open	The order has been created and is waiting for dealer to process.
Ready For Shipping	The order has been acknowledged and the funds have been captured.
Closed	The order is complete.
In Progress	The order has been accepted and payment has been captured. Customer is waiting for a call/email with shipping details from the Dealer.

Captured Icons:

Icon	Description
✔	The funds have been fully captured. Automatic Capture orders will always display this icon.
✔	Funds we're partially captured. On Manual Capture orders dealers have the ability to capture partial funds.
⚠	Funds have not been captured for this order yet.
⊖	Funds cannot be captured for this order. This will only show for ROPUS orders

Status Actions:

Status	Description
Open	Ready For Pickup, Close Order, Cancel Order, View Details, In Progress
In Progress	Ready For Pickup, Close Order, Cancel Order, View Details
Ready For Shipping	Close Order, Cancel Order, View Details
Closed	View Details
Cancelled	View Details
Any Status (TM/BD Only)	Invalidate, View Details