Siebel Order Management Guide Addendum for Fleet Management

Version 8.0 Rev A
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Contents

Chapter 5:   Web Services for Siebel Orders for Fleet Management

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1 What's New in This Release

What's New in Siebel Order Management Guide Addendum for Fleet Management, Version 8.0 Rev A

Table 1 lists changes described in this version of the documentation.

Table 1.   New Product Features for the Siebel Order Management Guide Addendum for Fleet
            Management, Version 8.0 Rev A

Topic	Description
"Adding Stops to the Order" on page 36	Modified to indicate that there can be multiple stops at a single location.
"Rejecting the Revision of the Order" on page 49	Modified to describe how statuses of revisions change when you reject an order.
"Canceling the Order" on page 49	Modified to describe how statuses of revisions change when you cancel an order.

2 Overview of Siebel Orders for Fleet Management

This chapter provides an overview of Siebel Orders for Fleet Management. It includes the following topics:

- "Oracle Fleet Management" on page 7
- "About Siebel Orders for Fleet Management" on page 8
- "Scenario for Using Siebel Orders for Fleet Management" on page 8

Oracle Fleet Management

Oracle Fleet Management is used to manage a fleet that provides transportation services, such as a fleet of tractors, trailers, and their drivers. It is used to:

- Manage the individual assets.
- Plan the use of the fleet of assets.
- Take orders for the use of the assets
- Dispatch the assets.
- Monitor and track the assets in real time.
- Settle the costs associated with the fleet.
- Manage human resources (drivers) for the fleet.
- Manage the life cycle of the assets.

Oracle Fleet Management involves integration of the following applications:

- **Siebel Customer Relationship Management (CRM).** Order quote and capture
- **Oracle Transportation Management.** Fleet planning and execution, and driver management
- **Enterprise Business Suite Asset Lifecycle Management.** Asset definition, management and maintenance
- **Enterprise Business Suite Human Resources.** Driver human resources, such as scheduling and pay
- **Enterprise Business Suite Financials.** Settlement, accruals, and financial management
- **Application Integration Architecture.** Integration using Process Integration Packs

NOTE: It is possible to integrate with other applications instead of with these Oracle applications. For example, you might have a legacy, transportation-management application that you integrate with instead of Oracle Transportation Management. If you have integrated with another transportation-management application, whenever this document mentions Oracle Transportation Management, use this other application instead.

About Siebel Orders for Fleet Management

This book covers only using Siebel CRM for quoting and capturing orders within Oracle Fleet Management. Use this book with *Siebel Order Management Guide*. This book describes the features of Siebel Orders for Fleet Management that are different from the standard features of Siebel Order Management.

The following standard features of Siebel Order Management do not apply to Siebel Orders for Fleet Management:

■ **Pricing.** Any discussion of pricing in *Siebel Order Management Guide* and *Siebel Pricing Administration Guide* does not explicitly apply to Siebel Orders for Fleet Management, which uses the rating inquiry engine of Oracle Transportation Management to do its pricing.

■ **Upsell Products.** The discussion of upsell products in *Siebel Product Administration Guide* does not explicitly apply to Siebel Orders for Fleet Management, which has its own method of creating upsell products, described in "About Administering Upselling for Fleet Management" on page 11.

■ **Eligibility.** Eligibility to purchase products, as described in *Siebel Order Management Guide* and *Siebel Product Administration Guide*, does not apply to fleet management, and the fields related to eligibility are removed from Order and Product records.

NOTE: The Siebel Bookshelf is available on Oracle Technology Network (OTN) and Oracle E-Delivery. It might also be installed locally on your intranet or on a network location.

Oracle Fleet Management requires the integration of the Siebel application with the other applications listed previously in "Oracle Fleet Management" on page 7. This integration uses the Web services covered in Chapter 5, "Web Services for Siebel Orders for Fleet Management."

Scenario for Using Siebel Orders for Fleet Management

This topic gives one example of how Siebel Orders for Fleet Management might be used. You might use it differently, depending on your business model.

Taking the Order

A customer service representative at a delivery company gets a call from a customer who wants to schedule a one-way delivery of fragile materials.

The customer service representative looks up the customer in the Siebel application. If the customer is an existing customer, the customer service representative uses the customer information already in the database. If the customer is a new customer, the customer service representative adds the account and contacts in the Siebel application in the usual way, as described in *Siebel Applications Administration Guide*.

The customer service representative creates a new order, entering information in the order header and order line item for Siebel Orders for Fleet Management, as described in "Process of Creating Orders for Fleet Management" on page 32. The order contains added fields that are specific to fleet management. For example, the header includes the origin and destination locations for this delivery. This information will be passed to back-office applications and used to price and manage the order.

In the Line Items view, the customer service representative adds a line item for the product named *Transportation*. In addition, because this is an order to transport fragile material, the customer service representative adds a line item for the accessorial product *Driver Hand Unload By Piece*, which means that the routine precautions for dealing with fragile materials will be taken and will be included in the price charged to the customer.

The customer service representative enters the stop records for the transportation product. Because this order is a one-way delivery, it has only two stops, the origin where the material is picked up, and the destination where it is delivered.

The customer service representative also enters actions that are necessary at each of these stops. In this case, the actions are special instructions that are needed while picking up and delivering fragile products.

In the Commodity view, the customer service representative adds records specifying the commodity that will be delivered. The customer service representative enters the weight of the product and other relevant details. The customer service representative enters the stops and actions for the commodity.

Rating the Order

Now that the details of the order have been entered, the customer service representative clicks the Get Rating & Routes button to rate the order. Siebel Orders for Fleet Management calls the rating engine of Oracle Transportation Management to do the rating.

The rating engine determines the availability of resources to perform the delivery, based on the requested start date and the requested end date for the origin and destination. The rating engine also determines prices, including the total price, the base price for the delivery on each date, the price for the special handling, and other possible pricing details, such as a surcharge for fuel. It returns this information to the Siebel application, where it is displayed in the Solutions view.

Completing and Verifying the Order

The customer service representative uses the Siebel application to complete the order. The customer service representative tells the customer about the list of solutions that has been generated. Different solutions have different dates of delivery and different prices. When the customer chooses a solution, the customer service representative selects the solution record and clicks Confirm Now.

Information about this solution is added to the additional fields in the order record. These fields are used to capture pricing and resource information from Oracle Transportation Management.

Upselling to the Customer

After entering all the information for this order, the customer service representative looks at the Upsell view.

This view shows that, during the last six weeks, the customer has placed a large number of orders for rail transportation from Chicago to New York and that these orders had a large static profit. It also shows that rail transportation from Chicago to New York is a targeted lane, which the transportation company is focusing on selling.

The customer service representative asks whether the customer will want rail transportation from Chicago to New York in the near future. The customer will want it later in the week and will want to check the pricing, and possibly place the order now.

After submitting the current order, the customer service representative clicks the Auto-Order button to create the new upsell order. The customer service representative will then get more details for the new order from the customer, and will generate possible solutions for the customer. The customer service representative asks whether the customer will also want transportation in some of the other lanes in the Upsell list, but the customer does not want this immediately.

Submitting the Order and Checking the Status

The current order is complete, so the customer service representative clicks the Submit button. After the order is submitted, the information is passed from the Siebel application to Oracle Transportation Management, which executes the order and returns information on the order's status to the Siebel application.

If the customer inquires about the status of the order, the customer service representative can respond by looking at the Status field of the order record, line item records, stop records, and action records in the Siebel application.

3 Administering Siebel Orders for Fleet Management

This chapter covers the administrative tasks for Siebel Orders for Fleet Management that are different from the standard administrative tasks for order management. It includes the following topics:

About Administering Upselling for Fleet Management

After customer service representatives have entered orders, they go to the Upsell view to see which lanes they will try to upsell to a customer. The records displayed in the Upsell view depend on:

- **Score.** A score is calculated for each lane for this customer, based on the customer's order history; see "Configuring the Score for Upselling" on page 12. It displays the ten lanes with the highest scores in the Upsell view. The customer is most likely to ship product using these lanes, and they have the highest profit.

- **Targeted lanes.** Your marketing department creates a list of targeted lanes, which are routes where your company wants to focus on selling transportation. If a lane displayed in the Upsell view is also a targeted lane, it is indicated in the NM (network management) field for that lane.

The customer service representative can upsell to this customer in these ten lanes and can emphasize the lanes that are targeted lanes, as described in "Upselling to the Customer" on page 45. If the customer places an upsell order, it is an additional order, which is separate from the initial order.

For more information about administering upselling, see:

- "Configuring the Score for Upselling" on page 12
- "Adding Targeted Lanes" on page 13

Configuring the Score for Upselling

Whenever Oracle Transportation Management sends information that an order is complete, the Siebel application adds information about this order to its order history. The order history aggregates weekly orders for each account for each lane.

This history is used to calculate a score for each lane that each account uses.

With the preconfigured Siebel Orders for Fleet Management application, the score is calculated for the last six weeks. This period is configurable and is stored in the system preference, FM Eval Period in Weeks.

The score is configurable. It is a calculation with a weighted measure, including loads for each week and static profit for all orders that a customer has placed for a lane during the evaluation period.

Formula for Calculating the Score

You can configure the score by changing the system preferences used in the formula for calculating the score.

With the preconfigured application, the score for each lane for each account is calculated using the following formula:

```
Min(FM Upsell Score Max Ord Count, Order Count)*Min(FM Upsell Score Max Stat Prft,
Order Static Profit).
```

The formula uses the following variables, some of which are configurable:

- **Order Count.** The total number of orders from this account for this lane during a given period. The period is defined by system preference: FM Eval Period in Weeks, as mentioned previously, and it can be configured by changing the value of this system preference. The Order Count field itself must be part of the formula and cannot be removed or replaced with another field. The Order Count field is in the FM Order History business component.

- **FM Upsell Score Max Ord Count.** A system preference that indicates the maximum value for the number of orders used in the calculation. The default value is 6. You can configure the variable by changing the value of the system preference.

- **Order Static Profit.** The total static profit from this account for this lane. You cannot configure this variable. The Order Static Profit field is in the FM Order History business component.

- **FM Upsell Score Max Stat Prft.** A system preference that indicates the maximum value for the static profit used in the calculation. The default value is 500. You can configure the variable by changing the value of the system preference.

For more information about setting system preferences, see *Siebel Applications Administration Guide*.

How the Score Is Used

After a customer service representative creates an order for a customer, the lanes with the highest score for that customer are displayed in the Upsell view for the order. The records are sorted by score, so that the lane with the highest score is at the top of the list. With the preconfigured application, the ten highest lanes are listed. This value is configurable and is stored in system preference FM No of Upsell Lanes.

The customer service representative tries to sell the customer more orders for these lanes in addition to the initial order, because these are the lanes where the customer is likely to place orders with a high static profit.

Adding Targeted Lanes

The marketing department of the transportation provider defines the targeted lanes; that is, the lanes where the company wants to focus on selling transportation.

A *lane* is a route between an origin and a destination using a given line of business. For example:

■ Truck transportation from Chicago to New York is a lane.

■ Rail transportation from Chicago to New York is a different lane.

Instead of cities, regions can be used as the origin and destinations of lanes. For example, if a transportation provider targets the lane representing truck deliveries from Berlin to Paris, it might also want this lane to include deliveries from the suburbs of Berlin and to the suburbs of Paris . To include the suburbs, it defines the regions, based on the postal codes, or on city and state names. Regions are defined in external applications, which must be integrated with the Siebel application.

You can define targeted lanes in an external application that is integrated with the Siebel application, or you can define targeted lanes in the Siebel application, as described in the following procedure.

To define targeted lanes

1   Navigate to the Administration - Fleet Management screen, then the Targeted Lanes view.

2   Display all fields:

   a   From the Targeted Lanes menu, select Columns Displayed.

   b   Use the Columns Displayed dialog box to move the Effective Start Date, Effective End Date, and Active fields from the Available Columns list to the Selected Columns list.

   c   Click Save.

3 Add new records to the Targeted Lanes list, and complete the necessary fields, described in the following table.

Field	Description
Origin City, Origin State	If you are using a city as the origin, enter the name of the city and state.
Destination City, Destination State	If you are using a city as the destination, enter the name of the city and state.
Origin Pricing Region	If you are using a region as the origin, enter the name of the region.
Destination Pricing Region	If you are using a region as the destination, enter the name of the region.
LOB	Select the line of business for this lane. For example, lines of business might be truck, rail, or intermodal.
Effective Start Date	Enter the date when the designation of this lane as a targeted lane first becomes effective.
Effective End Date	Enter the date when the designation of this lane as a targeted lane is no longer effective.
Active	Select this checkbox to activate the designation of this lane as a targeted lane. For the lane to be used as a targeted lane, the Active checkbox must be selected, the current date must be after the Effective Start Date, and the current date must be before the Effective End Date if one exists.

Creating Products for Fleet Management

Before the customer service representatives can create orders, the product administrator must create the appropriate products for your implementation of Siebel Orders for Fleet Management.

Table 2 shows some product types and some examples of products that you might create for each type. The product types and products that you want depend on your business model.

Table 2.   Sample Product Types and Products

Product Type	Description	Examples of Products
Transportation	The transportation products that your fleet provides.	Transportation **NOTE:** The seed data provides a product with the name, *Transportation.* You can create other products of the type Transportation, if it is appropriate for your business model.
Accessorial	Optional extra services that can be purchased with the transportation products.	■ Steam Trailer ■ Customer Live Unload
Commodity	The products that you deliver for your customers.	■ Frozen Foods ■ Fresh Foods ■ Gravel

If necessary, you can create your own product types. For information about configuring your own product types, see *Configuring Siebel Business Applications.* For information about creating products, see *Siebel Product Administration Guide*.

Creating Locations for Fleet Management

When customer sales representatives create orders, they enter the locations of all pickups and deliveries. In addition, they can enter locations for the types: Border Crossing and Other.

The Location screen is specific to orders administration for Fleet Management. It includes an Account view and a Contact view, which uses accounts and contacts created in the standard Siebel application. For more information about working with accounts and contacts, see *Siebel Applications Administration Guide*.

For fleet management, one account might have many locations. For example, one of your accounts might be a large retail chain, and the locations that you provide transportation services to might include all of this chain's individual warehouses and stores in your region. You must enter a location record for each of these locations.

Because many deliveries are to repeat customers, with pickup and drop off at the same locations, the customer service representative does not always have to enter new location information while placing an order.

NOTE: The Siebel application contains an Administration - Location screen that is used for Siebel Events Management. This field is not related to the locations that are used in Siebel Orders for Fleet Management.

Adding the Location Record

The location record is created using information from an existing account, including the organization within that account. If an account for this customer does not already exist, you must create one, as described in *Siebel Applications Administration Guide*.

To add a location record

1 Navigate to the Administration - Fleet Management screen, then the Location view.

2 Add a new record to the Location list, and complete the necessary fields. Some fields are described in the following table.

NOTE: Other fields in this record are filled in when you enter information in other views.

Field	Description
Location Name	Enter a name for the location. The name is not the same as the account name, because one account might have many locations.
Location Type	Select the location type. Some types are Ship From/Ship To, Invoice To, Airport, Port, Rail Station.
Location Valid	The field indicates whether the location is valid. You can update this field manually, or integrate it with an external application that updates this field.
Organization Name	Select the organization within the account that owns this location. The default is *Default Organization*. If necessary, you can implement single-organization visibility for locations, independent of accounts. In that case, you do not have to select the organization in this field.
Owner Account	Select the account that owns this location. For example, an account might own a warehouse facility that many retailers use to transfer goods. These accounts are known as third-party retailers
Location Alias	Enter an alias for the location.
Active	Do not select this check box when you are first entering the location record. Select it after you have entered all necessary information in all views and the location is ready to be used.

Adding Accounts for the Location

When you created the location record, you added the account that owns the location. Next, you add all accounts that are tendering parties who use this location.

When the customer service representative adds the origin, destination, or other stops for an order, the Siebel Orders for Fleet Management displays only locations associated with the tendering party. Thus, you must add all tendering parties who use this location, so the customer service representative can choose the location as stops in their orders.

With the preconfigured Siebel Orders for Fleet Management application, all the stops for an order display only locations associated with the tendering party for the offer. Thus, you must add the accounts for all tendering parties who use the location, to allow the location to be used in orders from those tendering parties.

For example, if the location is a warehouse that is owned by a third-party retailer and that is used by a number of your accounts as tendering parties, you enter the third-party retailer as the owner account in the location record, and you enter all the accounts that use the warehouse in this Accounts list.

To add an account

1   Click the Accounts view tab.

2   Click Add.

3   In the Add Accounts dialog box, select the appropriate account, and click OK.

Adding Contacts for the Location

Enter information about the employees who are your contacts at this location.

The Contacts list displays all existing contacts in the Siebel application. If the contacts at this location do not already exist, you must create them, as described in *Siebel Applications Administration Guide*.

To add a contact

1   Drill down on the Name field of the location record.

2   Click the Contacts view tab.

3   Click Add.

4   In the Add Contacts dialog box, select a contact, and click OK.

Adding Addresses for the Location

Enter all the addresses for the location. For example, a large warehouse might have an operational address where the trucks go, a separate billing address, and other possible addresses.

Though you can enter many addresses for a location in Siebel Orders for Fleet Management, only one address is sent to Oracle Transportation Management, the primary address. Select the Primary checkbox for the address that you want to be sent to Oracle Transportation Management. This is generally the address where the pickup or delivery is made, since this is the address that Oracle Transportation Management provides to the driver.

To add an address

1   Click the Addresses view tab.

2   Click Add.

3   In the Add Address dialog box, select the appropriate address, and click OK.

4   Select the Primary checkbox of the address that you want to be sent to Oracle Transportation Management.

Adding Roles for the Location

The role for the location describes its role in the delivery process. For example, a location might be a warehouse where frozen food is picked up, or it might be the address where deliveries are accepted for a given chain store. A location might have multiple roles. For example, a single location might be both a place where you make deliveries and a place where you send invoices.

To add a role

1   Click the Role view tab.

2   Add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Description
Primary	Select this check box if this role is the primary role for the location. If the location has only one role, select this check box.
Active Flag	By default, this check box is selected, so the role is active. You can use this field to deactivate roles rather than deleting them, so the role is not used.
Role Type	Select the type of the role. The types are: Invoice To and Ship From/Ship To.
Description	Enter a description of the role.

Activating the Location

After you have entered all needed information, activate the location.

To activate the location

1 Click the Locations view tab.

2 In the Locations list, in the record for this location, select the Active check box.

Creating Product Favorites for Fleet Management

Product favorites are combinations of products that have been saved for easy reuse. The product favorite can then be added to an order, instead of adding each product individually.

Product favorites have the advantage of allowing the customer service representative to associate accounts, agreements, or lines of business with the product favorite, as described in "Adding Product Favorites" on page 36. This association is useful because:

■ A favorite can represent a common scenario of order fulfillment for a specific account, line of business, or agreement.

■ Within the common scenario, a favorite can include products automatically using associated product favorites.

■ Favorites can be used to create actions automatically.

Product favorites can reduce the effort of creating orders, and can also add another level of control to eliminate errors in order entry.

Creating Product Favorite Records

You create product favorite records for Oracle Fleet Management in the same way as you do in standard Siebel Business Applications, as described in the section on product selection favorites in *Siebel Order Management Guide*.

Differences from standard order management are:

■ Product favorites for Fleet Management are created in the Administration - Fleet Management screen.

■ The fields described in Table 3 are added to the product favorites record, and all are optional.

Table 3.   Added Field in Product Favorite Record

Field	Description
Start Effective Date	Enter the date when the product favorite can first be used.
End Effective Date	Enter the date when the product favorite can no longer be used.

Table 3.   Added Field in Product Favorite Record

Field	Description
Line of Business	Choose a line of business to which this product favorite applies.
	If you choose a line of business, this favorite will be available to add to an order only when the line of business in the order header matches this line of business.
	If you leave this field empty, this favorite will be available regardless of the line of business in the order header.
Agreement	Choose an agreement to which this product favorite applies.
	If you choose an agreement, this favorite will be available to add to an order only when the agreement in the order header matches this agreement.
	If you leave this field blank, this favorite will be available regardless of the agreement in the order header.
Account	Choose an account to which this product favorite applies.
	If you choose an account, this favorite will be available to add to an order only when the account in the order header matches this agreement.
	If you leave this field blank, this favorite will be available regardless of the account in the order header.
Associated Product Favorites	Select the parent product for the product favorite.
	All the line items for this product favorite are displayed in this picklist. You must select the parent product so relationships among the line items in the product favorite can be generated correctly.
	This field allows the administrator to enforce the selection of one product each time the other product is chosen. For example, you can associate the special service product *Live Load/Unload* with the commodity *Cattle*. In this example, the commodity *Cattle* would be the parent product, and the special service *Live Load/Unload* would be the associated product. Thus, whenever the customer service representative selects this favorite for transporting cattle, the service product would be added also.

Creating Actions for Product Favorites

You can also create Action records for specific items in product favorites.

When the customer service representative uses the product favorite, as described in "Adding Product Favorites" on page 36, the product favorite item's actions are associated with the order's stop record, as follows:

■ When the customer service representative adds the product favorite to the order, an order line item is created for each product favorite line item.

■ When the customer service representative creates a stop record for the appropriate order line item, the action is automatically added for that stop.

To create an action for a product favorite

1 Add an item to the product favorite.

For more information, see *Siebel Order Management Guide*.

2 Create an action record for this product favorite item.

3 Choose a value in the Action Type field.

Configuring Picklists for Fleet Management

Many fields used by Siebel Orders for Fleet Management contain picklists that let you select a value. You might want to modify these picklists to suit your business model. For example, when the customer service representative chooses actions for each commodity or for each stop, your company probably wants a picklist with different values from the default to suit your business model.

The values displayed in this picklist are controlled in the List of Values view of the Data Administration screen. For each value displayed in the picklist, there is one record in the List of Values view.

Table 4 shows the value of the Type field for picklists used in Siebel Orders for Fleet Management and the default values for each type. If you want to change the default values for any type, modify the records in the List Of Values view.

Table 4.   Type Fields for Picklists and the Default Values

Type	Display Values by Default	Language Independent Code by Default
FM_ACTION_STATUS_TYPE	Cancelled	Cancelled
	Complete	Complete
	In Progress	In Progress
	Inactive	Inactive
	Not Started	Not Started
FM_ACTION_TYPE	Driver Assist Load	Driver Assist Load
	Driver Assist Unload	Driver Assist Unload
	Driver Hand Load by Piece	Driver Hand Load by Piece
	Driver Hand Unload	Driver Hand Unload
	Driver Hand Unload By Piece	Driver Hand Unload By Piece
	Drop Loaded Trailer	Drop Loaded Trailer
	Hire Lumper To Load	Hire Lumper To Load
	Hire Lumper to Unload	Hire Lumper to Unload
	Mechanical Driver Load	Mechanical Driver Load
	Mechanical Driver Unload	Mechanical Driver Unload
	Pickup Loaded Trailer	Pickup Loaded Trailer
FM_DIMENSION_UOM	Centimeter	Centimeter
	Feet	Feet
	Inches	Inches
	Meter	Meter
	Yard	Yard
FM_DISTANCE_UOM	Kilometer	Kilometer
	Miles	Miles
	Nautical Miles	Nautical Miles
FM_HOLD_REASON	Credit	Credit

Table 4. Type Fields for Picklists and the Default Values

Type	Display Values by Default	Language Independent Code by Default
FM_LINE_OF_BUSINESS	Bulk Dedicated & Southwest Global Supply Chain (GSCM) Intermodal One Way Regional SFI Transportation Management (STM)	Bulk Dedicated & Southwest Global Supply Chain (GSCM) Intermodal One Way Regional SFI Transportation Management (STM)
FM_LOC_ROLE	Invoice To Ship From/Ship To	Invoice To Ship From/Ship To
FM_LOC_TYPE	Airport Border Crossing Carrier Dispatch Location Invoice To Port Rail Station Ship From/Ship To XDock	Airport Border Crossing Carrier Dispatch Location Invoice To Port Rail Station Ship From/Ship To XDock
FM_MILEAGE_PCKG	19 (HHMG) MileMaker version 18 PC Miler version 15-21 PTV	19 (HHMG) MileMaker version 18 PC Miler version 15-21 PTV

Table 4.   Type Fields for Picklists and the Default Values

Type	Display Values by Default	Language Independent Code by Default
FM_ORDER_MODE	Air Transport	Air Transport
	All	All
	Barge Transport	Barge Transport
	Drayage Transport	Drayage Transport
	Express Transport	Express Transport
	Handling	Handling
	Intermodal Transport	Intermodal Transport
	LTL	LTL
	Multi	Multi
	Ocean	Ocean
	Parcel Transport	Parcel Transport
	Pipeline Network Transport	Pipeline Network Transport
	Rail	Rail
	Small Pack	Small Pack
	Truckload	Truckload
	Unknown	Unknown
	Vessel Transport - Charter	Vessel Transport - Charter
	Vessel Transport - Container	Vessel Transport - Container
	Vessel Transport - NVOCC	Vessel Transport - NVOCC
FM_ORD_DTL_TYPE	Order Reference	Order Reference

Table 4.   Type Fields for Picklists and the Default Values

Type	Display Values by Default	Language Independent Code by Default
FS_ORDER_STATUS	Inactive	Inactive
	Accepted	Accepted
	PI-Sent To Analysis	PI-Sent To Analysis
	PI-Sent To Decontamination	PI-Sent To Decontamination
	Received	Received
	Assigned	Assigned
	Moving	Moving
	Released	Released
	Submitted-Pending	Submitted-Pending
	Transportation Order	Transportation Order
FM_PACKAGING	Bags	BG
	Bales	BL
	Boxes	BX
	Bundles	BD
	Cans	CA
	Coils	CO
	Crates	CR
	Drums	DR
	Kegs	KG
	Pail	PA
	Racks / Cages	RX
	Rolls	RL
	Super Sacks	SS
	Tubes	TU

Table 4.   Type Fields for Picklists and the Default Values

Type	Display Values by Default	Language Independent Code by Default
FM_REJECT_REASON	Commodity not feasible	Commodity not feasible
	Credit Cancel	Credit Cancel
	Customer Cancel	Customer Cancel
	Customer Request	Customer Request
	Failed To Meet Min Profit Req	Failed To Meet Min Profit Req
	Market restrictions	Market restrictions
	No agreement	No agreement
	No capability	No capability
	Order Expired	Order Expired
	Rate not competitive	Rate not competitive
	Transit not feasible	Transit not feasible
FM_SHIPPING	Floor	FL
	Pallet Double Stacked	PD
	Pallet Single Stacked	PL
	Slipsheet	SS
FM_STOP_DTL_TYPE	Accounting Number	Accounting Number
	Appointment Number	Appointment Number
	Bond Number	Bond Number
	Customs Broker Name	Customs Broker Name
	Master Bill (MB)	Master Bill (MB)
	PARS Number	PARS Number
	Pickup Reference Number	Pickup Reference Number
	Purchase Order (PO)	Purchase Order (PO)
	Release Number	Release Number
	Seal Number	Seal Number

Table 4.   Type Fields for Picklists and the Default Values

Type	Display Values by Default	Language Independent Code by Default
FM_STOP_STATUS_TYPE	Arrived	Arrived
	Assigned	Assigned
	Cancelled	Cancelled
	Complete	Complete
	Inactive	Inactive
	Unassigned	Unassigned
FM_STOP_TYPE	DROP-OFF (Dest)	DROP-OFF (Dest)
	PICK-UP (Origin)	PICK-UP (Origin)
	BORDERX Pickup	BORDERX Pickup
	Border Crossing	Border Crossing
	DROP-OFF	DROP-OFF
	Delivery	Delivery
	Other	Other
	PICK-UP	PICK-UP
FM_VOLUME_UOM	Cubic Centimeter	Cubic Centimeter
	Cubic Feet	Cubic Feet
	Cubic Inches	Cubic Inches
	Cubic Meter	Cubic Meter
	Cubic Yards	Cubic Yards
	Gallons	Gallons
	Gallons (Canada)	Gallons (Canada)
	Liters	Liters

Table 4.   Type Fields for Picklists and the Default Values

Type	Display Values by Default	Language Independent Code by Default
FM_WEIGHT_UOM	KILOGRAMS KIPS (1000 POUNDS) METRIC TONS (1000 KG) POUNDS TONS (2000 POUNDS)	KILOGRAMS KIPS (1000 POUNDS) METRIC TONS (1000 KG) POUNDS TONS (2000 POUNDS)
PROD_CD	Transportation Accessorial Special Service Commodity	Transportation Accessorial Special Service Commodity

To configure a picklist

1   Navigate to the Administration - Data screen, then the List of Values view.

2   In the Type field, query for the type you want to modify, using one of the type values listed in
Table 4.

3   Add one record for each value of this type that will be displayed in the picklist.

Configuring Validation for Verifying and Submitting Orders for Fleet Management

When the user clicks the Verify button or the Submit button, two levels of the order are checked:

■   **Order validation.** The fields in the order are checked for valid values.

■   **Solution validation.** The pricing solution in Oracle Transportation Management or another
fulfillment system is checked to see that it is still valid.

You can configure either or both of these levels.

Order Validation

The workflow, SWISendOrder, has been modified to call a fleet management specific rule set. This
workflow calls rules in the Data Validation Manager in the rule set named, FM Order Validation. You
can modify the rules in this rule set to change the validation functionality.

If this workflow is not modified, it checks the following fields and displays error messages if any are
not valid:

■ The business component [Order Entry - Orders] must have valid values in the following fields: Tendering Party, Liable Party, Origin Location, Destination Location, Origin Start Req Pick Up Date, Origin End Req Pick Up Date, Destination Start Req Pick Up Date, Destination End Req Pick Up Date.

■ The business component [Order Entry - Line Items] must have at least one record where the field Product Type is set to Transportation.

■ There must be one stop record where Type is set to DROP-OFF (Dest), and Location Id is set to Order Entry - Orders.Destination Location Id.

■ There must be one stop record where Type is set to PICK-UP (Origin), and Location Id is set to Order Entry - Orders.Origin Location Id.

■ The field, Order Entry - Orders.Status, must have one of the following values: Accepted, Released, Assigned, Moving, Complete, Cancelled. (A cancelled order is valid and must be submitted to Oracle Transportation Management.)

■ If the field, Order Entry - Orders.Revision > 1, then this order must be the latest revision. For example, if five revisions exist for a given order, and the user is trying to verify order revision number three, then an error message appears.

■ The field, Order Entry - Orders. Hold Flag, must be False. (If it is True, the order is on credit hold, meaning that it cannot be shipped until the customer's credit is confirmed.)

■ For all records, the following applies:

   ■ The field, Order Entry - Orders.Solution Valid, must be True.

   ■ The field, Order Entry - Line Items.Solution Valid, must be True.

   ■ The field, FM Stops.Solution Valid, must be True.

   These fields indicate that the pricing solution is valid. They must be configured as described in the following topic.

■ If the product type is *Commodity*, there must be one pickup stop and one drop-off stop for it.

The following procedure describes how to modify the validation rules.

To modify the order validation rules

1 Navigate to the Administration - Data Validation screen, then Rule Sets view.

2 In the Validation Rule Set list, drill down on the rule set that has the name, FM Fleet Order Validation, and the status of Active.

3 Modify this rule set by adding, editing, or deleting rules.

   For detailed instructions about creating and modifying rules, see *Siebel Order Management Infrastructure Guide*

Solution Validation
Solution validation provides the Boolean field [Solution Valid Flag] within three Siebel business components:

■ **[Order Entry - Orders.Solution Valid Flag].** The field Solution Valid Flag in the business component Order Entry - Orders.

■ **[Order Entry - Line Items.Solution Valid Flag].** The field Solution Valid Flag in the business component Order Entry - Line Items.

■ **[FM Order Entry - Stops.Solution Valid Flag].** The field Solution Valid Flag in the business component FM Order Entry - Stops.

Based on your own business process, you configure the application to populate these fields with values that indicate whether the solution is valid.

All of the fields are automatically populated in the following ways:

■ When the user clicks the Confirm button, the fields are set to *true*.

■ When the user clicks the Save button, the fields are set to *false*.

■ When the user clicks the Cancel button, the fields are set to *false*.

Apart from these values, you must configure the product to populate these fields using any declarative logic, such as Business Component User Properties or On Field Update Set *expression*. For example, you might want to say that a pricing solution is no longer valid for an order, a line item, or a stop is no longer valid if a user changes the requested start date or requested end date of the order.

You can configure the product to update one or more of these three fields with the value False whenever the requested start date or requested end date changes. Then the Validation functionality detects that the solution is no longer valid.

Configuring Validation for Canceling Orders for Fleet Management

When the user clicks the Cancel button, a cancel order is created and validated. The validation rule set for the cancel order checks for the same errors as the validation rule for verifying and submitting orders. For more information, see "Configuring Validation for Verifying and Submitting Orders for Fleet Management" on page 28.

You can change the rules used to validate this cancel order.

To modify the cancel order validation rules

1 Navigate to the Administration - Data Validation screen, then Rule Sets view.

2 In the Validation Rule Set list, drill down on the rule set that has the name, Fleet Cancel Order Validation, and the status of Active.

3 Modify this rule set by adding, editing, or deleting rules.

For detailed instructions about creating and modifying rules, see *Siebel Order Management Infrastructure Guide*

4 Using Siebel Orders for Fleet Management

This chapter describes how customer service representatives (CSRs) use Siebel Orders for Fleet Management. It includes the following topics:

About Adding Accessorial Products to Orders

Accessorial products are products ordered in addition to the transportation product. Examples of accessorial products are *Driver Loads/Unloads* and *Security Guard*.

The recommended methods of placing orders for accessorial products are summarized in Table 5.

Table 5.   Methods of Ordering Accessorial Products

Reason for Ordering	Recommended Method of Adding to Order
The customer requires the accessorial product for every order.	In this case, the accessorial product is identified as part of the agreement with the customer, and the rating engine will automatically add the accessorial product to all the customer's orders.
The customer requests the accessorial product for a specific order.	In this case, the accessorial product is added to the order as a separate line; see "Adding Order Line Items for Fleet Management" on page 35.
The commodity transported requires the accessorial product.	In this case, a product favorite is created that includes the commodity and accessorial product. This product favorite is added to the order; see "Adding Product Favorites" on page 36.

About Spot Quoting

In addition to the pricing of full orders described in "Process of Creating Orders for Fleet Management" on page 32, Siebel Orders for Fleet Management supports spot quoting.

Spot quoting provides prices rates for shipments that are due to be shipped soon and that meet certain requirements such as size, which the transportation provider must determine.

Spot quoting allows the customer service representative to price a movement of freight between the origin and destination by collecting a limited set of data. The origin and destination location data can be one of the following sets of data:

■ **Full Location Details.** All location details are provided.

■ **Partial Location Details.** These details can be one of the following:

 ■ Two-digit ZIP code

 ■ Three-digit ZIP code

 ■ City and state

 ■ City, state, and ZIP code (postal code)

This partial data is passed to the rating engine, which returns the pricing for the more generic lane, based on these partial location details. If the customer agrees to confirm the order based on this price, the customer service representative must enter full location details before submitting the order to Oracle Transportation Management.

Process of Creating Orders for Fleet Management

This process describes how to create orders in Siebel Orders for Fleet Management. It is different from the standard features of Siebel Order Management. For information about standard order management, see *Siebel Order Management Guide*.

To create orders in Siebel Orders for Fleet Management, perform the following tasks:

Creating the Order Header for Siebel Orders for Fleet Management

The order header for Siebel Orders for Fleet Management has added fields that allow the Siebel application to pass information to the rating engine used for scheduling and pricing orders.

NOTE: When you create the header, you must select a tendering party and the party liable for paying for the order, which are accounts already entered in the Siebel application, as described in *Siebel Applications Administration Guide*. You must also select an origin location and destination location, which are locations already entered, as described in "Creating Locations for Fleet Management" on page 15. If this information has not already been entered, you must enter it before creating the order header.

This task is a step in "Process of Creating Orders for Fleet Management" on page 32.

To create the order header

1 Navigate to the Fleet Management screen, then the List view.

2 Add a new record to the Orders list.

3 Drill down on the new record by clicking the Order Number field.

4 Complete the necessary fields in the order header. Some fields are described in the following table.

Field	Description
Tendering Party	Select the party placing the order.
Liable Party	Select the party liable for paying for the order.
Agreement	If the tendering party has a contractual agreement about pricing, select the agreement. This agreement allows you to use contract pricing rather than spot pricing, as described in "Scenario for Using Siebel Orders for Fleet Management" on page 8.
Invoice To	Select the party to whom you send the invoice.
Hold	Indicates whether the order has been placed on hold. For example, orders might be placed on hold because of issues with the customer's credit.
Origin Location	Select the origin location where the order is picked up. This list includes all the addresses of the tendering party.
Destination Location	Select the destination location where the order is delivered. This list includes all the addresses of the tendering party.
Start Req PickUp	Enter the earliest pickup date and time that the customer can accept.

Field	Description
End Req PickUp	Enter the latest pickup date and time that the customer can accept.
Start Req Delivery	Enter the earliest delivery date and time that the customer can accept.
End Req Delivery	Enter the latest delivery date and time that the customer can accept.
Line of Business	Enter the line of business for the order.
Division	Enter the division for the line of business for the order.
Status	Displays the status of the order. Initially, orders have the status of Open. The status changes depending on information returned by Oracle Transportation Management, as described in "Checking the Status of the Order" on page 46.
Revision	The revision number of the order. For more information, see the section about revising an order in *Siebel Order Management Guide*.
Type	Select Transportation Order.
Total Price	Displays the total price after a solution and price are returned by the rating engine.

5 Complete any necessary, additional fields in the More Info form. Some fields are described in the following table.

Field	Description
Tender Last Name	Select your contact at the tendering party. The first name is filled in automatically.
Mode	Select the mode of transportation.
Total Stops	Displays the total number of stops for the order. This field is calculated automatically as you enter the stops for the order.
Gross Weight	Displays the gross weight of the commodity being delivered. This field is calculated automatically as you enter the commodities for the order.
Weight UOM	Displays the unit of measure for the gross weight. For example, if the gross weight is 2 tons, *2* appears in the Gross Weight field, and *Tons* appears in the Weight UOM field.

Field	Description
Total Distance	Displays the total distance of the delivery. This field is calculated automatically as you enter the stops for the order. The distance between stops is provided by the integrated back-office application.
Distance UOM	Enter the unit of measure for the distance. For example, if the total distance is 100 miles, *100* appears in the Total Distance field and *Miles* appears in the Distance UOM field.

Adding Order Line Items for Fleet Management

After adding the order header, add all the line items for this order. One line item is the transportation product named *Transportation*. This line item is added automatically, based on the order type you entered in the header. Other line items can be accessorial products, such as *Driver Loads And Unloads*.

You can also add groups of line items to the order, instead of adding line items individually, as described in "Creating Product Favorites for Fleet Management" on page 19.

This task is a step in "Process of Creating Orders for Fleet Management" on page 32.

To add order line items

1 Click the Line Items view tab.

2 In the Line Items list, add new records, and complete the necessary fields. Some fields are described in the following table.

NOTE: There must be one record for the transportation product, which is the default record created because you chose Transportation Order as the order type. Optionally, you can add other records for accessorial products.

Field	Description
Product	Select the product.
Part #	Displays the part number for this product.
QTY	Enter the quantity of this product being ordered.
Accepted Price Pricing Method Price Offered Counter Offer	The rating engine will return values for these fields after you get the solution for this order. **NOTE:** The rating engine can also add new line items to the order, such as specific accessorial products or special services.

Adding Product Favorites

Rather than adding individual line items to the order, the customer service representative can use product favorites, which are groups of line items that are commonly ordered together. For more information about actions, see "Adding Actions to the Order" on page 39.

Before CSRs can use product favorites, the product administrator must define them. For more information, see "Creating Product Favorites for Fleet Management" on page 19.

The product administrator can associate product favorites with an account, a line of business, or an agreement, and can create an effective start date and end date for the product favorite. When the customer service representative creates an order, the customer service representative must choose an account and line of business for the order, and can choose an agreement for the order. When the customer service representative chooses a product favorite to add to the order, product favorites are available to add to that order only if they meet the following conditions:

■ **Start and End Effective Date.** These two fields in the product favorite are checked against the order header's origin start-requested date. A product favorite is available to add to the order only if the order header's start-requested date is between the product favorite's start-effective date and its end-effective date.

■ **Line of Business, Agreement, and Account.** If these fields in the product favorite are not null, then a favorite is available to add to the order only if the value of these fields in the product favorite match the value of the corresponding field in the order header.

■ When you add the favorite, the products in that favorite are displayed in the Products list.

This task is a step in "Process of Creating Orders for Fleet Management" on page 32.

To add a product favorite to the order

1 Click the Product Favorites view tab.

2 In the Favorites list, select a product favorite that you want to add.

The line items for that product favorite are displayed in the All Line Items list.

3 In the All Line Items list, select the line items that you want to add.

4 Click Add Items.

The selected line items are added to the Line Items view for the order.

Adding Stops to the Order

The Stops list is under the Line Items list. For each line item, you add the stops where the line item applies.

The simplest order is a one-way delivery with no accessorial products. For this order, you have one line item with the product named, *Transportation*. This line item has two stops:

■ One stop is of the type pickup (Origin) and is the same as the origin location for the delivery as a whole, which is in the order header.

■ The other stop is of the type DROP-OFF (Dest) and is the same as the destination location for the delivery as a whole, which is in the order header.

These two stop records are created automatically, based on the information you entered in the order header, when you click the Create O-D Pair button.

More complex deliveries, with intermediate pickups or deliveries, might have additional stops, for example, one stop for each pickup or delivery. You must add a stop record for each of these stops.

Accessorial products also have stops where they apply. For example, if the customer wants the commodities to be unloaded by hand at two stops, you add these two stops to an accessorial product that might be named *Unload by Hand*.

There can be more than one stop at one location. For example, a single order might include the following:

■ Pick up in the Chicago warehouse and drop off in the Detroit store.

■ Pick up in the Detroit store and drop off in the Chicago warehouse.

In this case, this one order has two stops in the Chicago warehouse on two different dates.

NOTE: All stops must be locations that have already been entered. If they have not been entered already, enter them as described in *"Creating Locations for Fleet Management" on page 15*.

This task is a step in *"Process of Creating Orders for Fleet Management" on page 32*.

To add stops to orders

1 Select the line item for the transportation product.

2 Click Create O-D Pair.

Records are added to the Stops list for the origin and destination stop, with information based on the origin and destination that you entered in the order header.

3 To add additional stops, add a new record to the Stop list for each stop, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Stop Sequence Number	The sequence of stops is generated automatically.
	For information on how to modify this field, see "Changing the Sequence Numbers" on page 39.
Location	Select the Location for this stop:
	■ If the Location dialog box includes the location of the stop, select that location, and click OK.
	■ If the Location dialog box does not include the location of the stop, click the New button to add it to the list in the Location Pick Applet, and then select it, and click OK.
	The list in the Location dialog box includes only locations that are already associated with one of the line items in the order, so you might have to use the New button to add more locations to it.
Status	Displays the status of the delivery at this stop. For more information on how the status is used, see "Checking the Status of the Order" on page 46.
Req Start	Enter the earliest time that the customer requests for the delivery.
Req End	Enter the latest time that the customer requests for the delivery.
Planned Start	After a solution is generated and selected, this field will display the planned earliest delivery time.
Planned End	After a solution is generated and selected, this field will display the planned latest delivery time.
Appointment Requested	Select this check box if the customer wants to create an appointment with the delivery vehicle at this stop.
Appointment Confirmed	Select this check box when the appointment is confirmed.
	Appointments are created and confirmed using Oracle Transportation Management.
Distance	Displays the distance between this stop and the previous stop, which is provided by the integrated back-office application.
Distance UOM	Displays the unit of measure used in the distance provided by the integrated back-office application.

4 If there are accessorial products, add stops for them:

a   Select the record for the accessorial product.

b   Add records to the Stop list, and complete the necessary fields, as described in Step 3.

Changing the Sequence Numbers

If the start time and end time for stops have changed, you might have to come back to this view, and change the sequence numbers for the stops. You can change the sequence numbers based on the values that you entered in the Req Start and Req End fields, or based on the values from a solution that are in the Planned Start and Planned End fields.

To change the sequence numbers

1   Select the line item for the transportation product.

2   From the Stops applet menu, select Re-Sequence Stops.

The stops are given new sequence numbers, based on their start and end times.

Adding Actions to the Order

Some products require special actions at some stops. For example, if the accessorial product is Driver Loads/Unloads, then different stops for this accessorial product might have the actions Unload By Hand, Tarp Unload, and Sort & Segregate.

Adding Actions Automatically

If line items were added using a product favorite, and actions were associated with the product favorite (as described in "Creating Product Favorites for Fleet Management" on page 19), then the customer service representative does not have to add the action as described in this procedure. Instead, actions are automatically added to the stops, as follows:

■   When the customer service representative adds the product favorite to the order, an order line item is created for each product favorite line item.

■   When the customer service representative creates a stop record for the appropriate order line item, the action is automatically added for that stop.

Adding Actions Manually

If actions are not added automatically, use this procedure to add the actions manually.

This task is a step in "Process of Creating Orders for Fleet Management" on page 32.

To add actions to the order

1   Select the Line Item record that the action applies to.

2   Select the stop record that the action applies to.

3 In the Actions list, add records for each action, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Action Type	Select the action.
Status	Displays the status of this action. For more information on how the status is used, see "Checking the Status of the Order" on page 46.

Adding Commodities to the Order

Next, you enter the commodities that you will deliver, specifying the stop where you pick up or deliver each commodity.

You must add a commodity record for every combination of a pickup and delivery. For example, if you are picking up 1,000 cases of frozen food at a warehouse, and you are delivering 600 cases to supermarket location A and 400 cases to supermarket location B, you must create two commodity records:

■ One commodity record says you pick up 600 cases at the warehouse, and deliver them to supermarket location A.

■ One commodity record says you pick up 400 cases at the warehouse, and deliver them to supermarket location B.

This task is a step in "Process of Creating Orders for Fleet Management" on page 32.

To add commodities to orders

1 Click the Commodity view tab.

2 In the Commodity list, add records for each commodity being delivered, and complete the necessary fields. Some fields are described in the following table.

Enter only the fields that apply to the commodity being shipped. For example, if the commodity is shipped and billed by units, such as pallets, enter values in the Packaging, PKG/Unit, Shipping, and Ship Units fields. However, if the commodity is shipped and billed by weight, enter values in the Weight and Weight UOM fields.

Field	Description
Commodity	Select the commodity being delivered, for example, frozen foods. The Select Commodity picklist displays products whose type is Commodity.
Packaging	Select the packaging, for example, cases.

Field	Description
PKG/Unit	Enter the number of packages for each shipping unit. For example, if the product is packaged in cases and shipped on pallets, and there are 100 cases on a pallet, then enter 100.
Shipping	Select the method used for shipping, for example, pallets.
Ship Units	Select the number of shipping units in this pickup and delivery. For example, if you are delivering four pallets, enter 4.
Weight	Enter the number for the weight of the commodity.
Weight UOM	Enter the unit of measure for the weight of the commodity. For example, if the weight of the commodity is 2 tons, enter 2 in the Weight field and Tons in the Weight UOM field.
Height	Enter the number for the height of the commodity.
Width	Enter the number for the width of the commodity.
Dimensions UOM	Enter the unit of measure for the height and width of the commodity. For example, if the height of the commodity is 2 meters, and the width of the commodity is 3 meters, enter 2 in the Height field, 3 in the Width field, and Meters in the Dimensions UOM field.
Over Dimension	Indicates whether the freight is larger than the vehicle's recommended load.
Status	Displays the status of this commodity. For more information on how the status is used, see "Checking the Status of the Order" on page 46.

Adding Stops for Commodities

For each of the commodities, add the stops where the commodity is picked up or delivered.

This task is a step in "Process of Creating Orders for Fleet Management" on page 32.

To add stops for accessorial products

1 In the Commodities list, select the commodity.

2 In the Stops list, add new records, and complete the necessary fields.

Add these records in the same way that you add stops to line items, as described in "Adding Stops to the Order" on page 36.

Adding Actions for Commodities

Some commodities might require special actions at some stops. If so, you must add those actions. Actions are priced through accessorial products or special-service products. However, you can add actions for commodities as well, because an accessorial or special-service product might apply to only some commodities at a stop. For example, the accessorial product, Driver/Loads/Unloads, applies at stop 2. At stop 2, the driver delivers one commodity that must be unloaded by hand and two commodities that do not have to be unloaded by hand. The action Unload By Hand applies only to the first product.

On the other hand, an action might apply to the entire stop and not to a specific commodity. The order provides the flexibility to implement either approach.

To add actions for commodities

1   Select the stop record that the action applies to.

2   In the Actions list, add records for each action for this stop, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Stop #	Displays the stop number of the selected stop.
Action Type	Select the action for this stop.

Getting Ratings and Routes

Ratings and routes provide the possible scheduling and pricing of an order, and display the options in the Solutions view.

The minimum data set necessary to request a solution includes the following set of fields: Liable Party, Tendering Party, Partial set of Origin or Destination fields (if no Agreement is specified), Full set of Origin or Destination fields (if Agreement is specified), Requested Start Date, and Requested End Date.

After entering all of these order details, the customer service representative gets the possible solutions that are available for the delivery dates and time slots that were specified:

■   The customer service representative clicks Get Ratings and Routes.

■   The Siebel application verifies that the minimum set of data needed to generate a solution is present.

■   The Siebel application calls the rating engine of Oracle Transportation Management, making an external Web service call to Oracle Transportation Management, and providing the order data structure in the request message.

■   Oracle Transportation Management generates the possible solutions.

■   The Siebel application automatically navigates the user to the Solutions view and displays the list of solutions.

This task is a step in

To get ratings and routes

■ In the Order Header form, click Get Ratings and Routes

The rating engine generates a list of solutions.

Choosing a Solution

The customer service representative asks the customer to choose among the solutions that have been generated.

After the rating engine generates solutions, the following information appears in the Solutions view:

■ The Solution list includes all the available solutions, with the planned start time, planned end time, total price, and other information for each solution.

■ The Solutions Details list includes details for each solution, including service providers and modes for each detail. If the order is multimodal, or includes several different pickups and deliveries, the list might include several service providers.

■ The Solution Detail Pricing list includes the pricing for each Solution Detail, breaking the price into elements, such as the basic transportation price, plus any other charges, such as the price of accessorial services, or the price of special services.

If there is a contractual agreement with the customer, the customer can choose one of the solutions and the published price displayed for it. If the customer does not have a contractual agreement, the customer can select one of the solutions and the spot price displayed for it, or the customer can choose one of the solutions and negotiate a different spot price.

This task is a step in .

To choose a solution

1 View the possible solutions in the Fleet Management screen, Solutions view.

After you have clicked Get Ratings and Routes, the rating engine generates the solutions, and the Siebel application navigates you to the Solutions view, where the solutions are displayed.

2 If the customer does not accept any of the listed solutions:

    a Click the Select check box for any solution.

    b Click Reject Fleet Order to reject the order.

3 If the customer is not able to decide yet:

    a Click the Select check box for the solution that the customer prefers.

    b Click Save Order to save the order and this solution for later reuse.

4 If the customer accepts one of the solutions:

    a Click the Select check box for the solution that you want.

b Click Confirm Now.

In the Line Items view, records are added representing the commodities and special services in the order. In the Order Header, the value Accepted appears in the Status field, and the total price of the solution appears in the Total Price field.

5 If the customer does not have a contractual agreement and wants to renegotiate the price of one of the solutions:

a Click the Select check box for the solution that you want.

The Select check box must be checked so you can edit the solution.

b In the Solution Detail Pricing list, in the Customer Offer field, enter the customer's offered price for each of the products listed.

Some accessorial products have a nonnegotiable price, so the NON-Negotiable check box is selected. The fields used for negotiating their prices are read-only. The rating engine determines which items are nonnegotiable.

c If the customer and the customer service representative agree a price for the products in the Solution Detail list, enter it in the Accepted Price field.

d Click Confirm Now.

In the Order Header, the value Accepted appears in the Status field, and the total price appears in the Total Price field.

Verifying the Order

At any time during the process of placing the order, you can verify the order to check that all the necessary information has been added to submit the order. If some information is missing or incorrect, an error message appears describing the problem.

For information about what information the Verify functionality checks and about how to configure the Verify functionality to check different information, see "Configuring Validation for Verifying and Submitting Orders for Fleet Management" on page 28. The same Verify functionality is called when you submit an order, so it is not necessary to verify the order as a separate step before submitting it.

To verify the order

1 Navigate to the Fleet Management screen, then List view.

2 Either select the order that you want in the Orders list, or drill-down on the Order number field of the order.

3 Click Verify.

Upselling to the Customer

After the main order is accepted, the customer service representative can try to sell additional orders to the customer. To sell more orders, the customer service representative looks at the Upsell view, which lists the lanes with the highest score, based on the customer's orders for these lanes during the last six weeks and on the static profit of these orders, as described in "Configuring the Score for Upselling" on page 12. The upsell record also indicates whether these lanes are targeted lanes, which marketing has chosen as lanes to focus selling effort on, as described in "Adding Targeted Lanes" on page 13.

If the customer wants to place an upsell order, the customer service representative can auto-create a record for the new order and enter more details.

When the customer service representative clicks Auto-Create, the Siebel application displays the new order. The customer service representative can do one of the following:

■ Submit the current order for execution before clicking Auto-Create.

■ Click Auto-Create, navigate back to the current order later, and submit it.

This task is a step in "Process of Creating Orders for Fleet Management" on page 32.

To add upsell products to the order

1 Click the Upsell view tab.

2 Ask whether the customer wants to place additional orders for any of the lanes listed in upsell view. Some fields of the Upsell view are described in the following table.

NOTE: The lane is defined by the LOB in the header plus the origin and destination entered in this view.

Field	Description
NM	If this lane is one of the targeted lanes, then *Y* is displayed. NM stands for network management.
Origin City and Origin State	The origin of the lane.
Destination City and Destination State	The destination of the lane.
Static Profit	Displays the static profit for the last order placed by this customer for this lane. The static profit is the profit for transportation, without including the profit for any additional commodities, accessorial products, or special services.
Count	Displays the number of orders from this customer for this lane in the last six weeks.
Accepted Price	Displays the accepted price for transportation for the last order placed by this customer for this lane.

3 If the customer wants to purchase a transportation product listed in the Upsell view:

    a Select the record for that product.

    b Click Auto Order.

       A new order is created for the upsell lane, and you complete the details for this order in the usual way.

Submitting the Order to Oracle Transportation Management to Execute

After completing the order, the customer service representative submits the order to Oracle Transportation Management.

This task is a step in "Process of Creating Orders for Fleet Management" on page 32.

To submit the order to Oracle Transportation Management to execute

1 Navigate to the Orders screen, then the Orders List view.

2 Drill down on the record for the appropriate order by clicking the Order Number field.

3 In the Order Header, click Submit.

Checking the Status of the Order

After you submit the order, Oracle Transportation Management takes over the fulfillment of the order from the Siebel application. While it manages the fulfillment of the order, Oracle Transportation Management passes status information to Siebel Orders for Fleet Management.

If the customer contacts the customer service representative to ask about the status of the order, the customer service representative can look at the order record to check the status of the order as a whole, the status of each line item, the status of each stop, and the status of each action.

The values for these status fields change depending on the stage in the order creation and fulfillment:

- Immediately before submitting to Oracle Transportation Management, the values for these status fields are:

  - **Order Header Status.** Accepted.

  - **Order Line Item Status.** Accepted.

  - **Stop Item Status.** Unassigned.

  - **Action Status.** Not Started.

- When Oracle Transportation Management creates an order, the values for these status fields are:

  - **Order Header Status.** Released.

- **Order Line Item Status.** Released.

- **Stop Item Status.** Unassigned.

- **Action Status.** Not Started.

■ When Oracle Transportation Management assigns the carrier, the values for these status fields are:

- **Order Header Status.** Assigned.

- **Order Line Item Status.** Assigned.

- **Stop Item Status.** Assigned.

- **Action Status.** Not Started.

■ When the carrier arrives and departs from the shipper, the values for these status fields are:

- **Order Header Status.** Moving (after the first stop is complete).

- **Order Line Item Status.** Moving (after the pickup is complete).

- **Stop Item Status.** Arrived or Completed.

- **Action Status.** Not Started, In Progress, or Completed.

■ When the carrier leaves the consignee, the values for these status fields are:

- **Order Header Status.** Complete.

- **Order Line Item Status.** Complete.

- **Stop Item Status.** Complete.

- **Action Status.** Complete.

■ When Oracle Transportation Management generates the invoice, the values for these status fields are:

- **Order Header Status.** Billed.

- **Order Line Item Status.** Complete.

- **Stop Item Status.** Complete.

- **Action Status.** Complete.

This task is a step in .

To check the status of the order

1 Navigate to the Orders screen, then the Orders List view.

2 Drill down on the record for the appropriate order by clicking the Order Number field.

3 To check the status of the entire delivery, look at the Status field in the order header.

4 To check the status of the delivery of a given line item:

  a Click the Line Items view tab.

  b View the Status field for the line item.

5 To check the status of the stops and actions for a given line item:

    a Click the Line Items view tab.

    b Select the appropriate line item.

       It is most common to select the line item for the transportation product, so you can see the
       stops where the stops transportation has been completed.

    c In the Stops list, look at the Status field for each stop.

    d To check whether all actions have been completed for a stop, select the stop record, and look in
       the Actions list at the Status field for each action.

6 To check the status of the stops and actions for a given commodity:

    a Click the Commodities view tab.

    b Select the appropriate commodity.

    c In the Stops list, look at the Status field for each stop.

    d To check whether all actions have been completed for a stop, select the stop record, and look in
       the Actions list at the Status field for each action.

About Working with Existing Fleet Management Orders

After you have finished creating a Fleet Management order, you can work with the existing order in
the following ways:

■ "Revising Fleet Management Orders" on page 48

■ "Rejecting the Revision of the Order" on page 49

■ "Canceling the Order" on page 49

Revising Fleet Management Orders

The customer service representative can change an order after it has been submitted by using the
revise functionality. However, the order cannot be revised after its status is Moving, Complete, or
Cancelled.

To revise an order

1 Check the status of the order.

    For more information on the status, see "Checking the Status of the Order" on page 46.

2 If the status does not prevent the order from being changed, do the following:

    a In the Order Header form, click Revise.

b Change the data as needed, select a new solution, and submit the changed order in the same ways used to create a new order.

For more information, see "Process of Creating Orders for Fleet Management" on page 32.

Rejecting the Revision of the Order

After you have revised an order, the customer might decide to reject the revision for some reason. For example, the revised order might be more expensive than the original order. The customer service representative can click the Reject Fleet Order button to reject the revision of the order, and revert to the previous version of the order.

An order can be rejected only if its status is Accepted or Open.

When you reject the revision of an order, the last active revision of the order that does not have the status of Rejected is given the status of Active again. For example:

1 Order 12345 Revision 1 is Active.

2 The user revises Order 12345. Order 12345 Revision 1 is set to Inactive, and Order 12345 Revision 2 is set to Active.

3 The user rejects Order number12345 Revision 2. Order 12345 Revision 1 is set to Active.

4 The user revises Order 12345. Order 12345 Revision 1 is set to Inactive. Order 12345 Revision 3 is set to Active.

5 The user rejects Order 12345, Revision 3. Order 12345 Revision 1 is set to Active.

NOTE: If you are working on the first version of the order rather than on a revision, clicking the Reject button cancels the order, but saves the information about the cancelled order in the Siebel database.

To reject a revision of an order

1 Navigate to the Fleet Management screen, then List view.

2 Either select the order that you want in the Orders list, or drill-down on the Order number field of the order.

3 Select a value in the Reject/Cancel Reason Code field.

4 Click Reject Fleet Order.

Canceling the Order

You can cancel any order that has already been sent to Oracle Transportation Management for execution, as long as the order has not been billed and completed. The order might be partially fulfilled, or fulfillment might not have begun.

To cancel an order, you must:

■ Click Revise to revise the order.

■ Select a cancel reason

■ Click Cancel to set the status of the order to Cancelled and cancel the appropriate line items and stops.

■ Click Submit to submit the order.

When you click Cancel, any line item or stop in the order that is not complete is updated with the status of Cancelled, and Oracle Transportation Management cancels the instructions to pick up or deliver at these stops. Line items or stops that already have the status of Complete are not updated with the status of Cancelled.

After an order is cancelled, none of its versions can be revised. For example:

1 Order 12345 Revision 1 is Active.

2 The user revises Order 12345 and then rejects the revision. Order 12345 Revision 2 is Inactive with the status Rejected. Order 12345 can be revised, and the changes apply to Revision 1.

3 The user revises Order 12345 and cancels the order. Order 12345, Revision 3 is Inactive with the status Cancelled. Order 12345 cannot be revised; none of the revisions can be changed.

Oracle Transportation Management might charge the customer cancellation fees for any parts of the order that were completed before cancellation. The cancellation fee is set up in Oracle Transportation Management, and not in the Siebel Business application.

If the customer wants to add any accessorial or special service products for the order to be cancelled, these products must be added before cancelling the order, because an order cannot be revised after being cancelled. First, revise the order to add the accessorial or special service products, if necessary, see "Revising Fleet Management Orders" on page 48, and then cancel the order.

To cancel the order

1 Navigate to the Fleet Management screen, then List view.

2 Either select the order that you want in the Orders list, or drill-down on the Order number field of the order.

3 Click Revise.

4 Select a value in the Reject/Cancel Reason Code field.

5 Click Cancel.

6 Click Submit.

5 Web Services for Siebel Orders for Fleet Management

This chapter provides a Web service reference for Siebel Orders for Fleet Management. It includes the following topics:

QueryTransportationSalesOrder ItineraryListSiebelReqABCSImpl Web Service

Use this outbound Web service to submit an order to the rating engine and get ratings in response. Its namespace is:

http://xmlns.oracle.com/ABCSImpl/Siebel/
CoreQueryTransportationSalesOrderItineraryListSiebelReqABCSImpl/V1

QueryTransportationSalesOrderItineraryListSiebelReqABCSImpl Operations

This Web service submits the order request to the third-party application to get feasible solutions for this transportation order.

The following operations are used for the
QueryTransportationSalesOrderItineraryListSiebelReqABCSImpl Web service. For a list of operations
associated with this Web service, see Table 6

Table 6.   QueryTransportationSalesOrderItineraryList Operations

Name	Description
QueryTransportationSalesOrderItineraryList	Submits the order request

Request Message Description: Process
For a description of this request message, see Table 7.

Table 7.   Request Message Description: Process

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
QueryTransportationSalesOrderItineraryListReqMsg:Query TransportationSales_1	Optional	Integration Object

Response Message Description: Process
For a description of this response message, see Table 8.

Table 8.   Response Message Description: Process

Node	Description	Type
QueryTransportationSalesOrderItineraryListReqMsg:Query TransportationSales_1	Optional	Integration Object

QueryTransportationSalesOrderItineraryListSiebelReqABCSImplService Application Interface
This topic describes the application objects called by this Web service. For more information on
application implementation, refer to your application development documentation on Oracle
Technology Network.

Service Object (Business Service or Workflow)
For a description of the service objects for this Web service, see Table 9.

Table 9.   QueryTransportationSalesOrderItineraryListSiebelReqABCSImplService Service Object

Siebel Repository Name	Boundary Object Type	Class
QueryTransportationSalesOrderItinerary ListSiebelReqABCSImplService	Business Service	CSSWSOutboundDispatcher

This object is called from the virtual business component context. Unlike other Web services, which
are generally called by clicking a button or selecting a menu item, this Web service is called when
an applet based on the appropriate virtual business component is displayed.

Data Objects (Integration Object)

For a description of data objects for this Web service, see Table 10.

Table 10.   QueryTransportationSalesOrderItineraryListSiebelReqABCSImplService Data Objects

Siebel Repository Name	External Name
SWIOrderIO	PDS Simplified Order
SWIOrderEntry(Sales)IORes	Order Entry (Sales)

Methods

For a description of the methods for this Web service, see Table 11.

Table 11.   QueryTransportationSalesOrderItineraryListSiebelReqABCSImplService Methods

Operation	Method
SWIOrderIO	PDS Simplified Order
SWIOrderEntry(Sales)IORes	Order Entry (Sales)

SWIContactServices Web Service

Use this inbound Web service to perform basic operations on the contact record, such as insert,
update, query and synchronize. Its namespace is:

http://siebel.com/asi/V0

SWIContactServices Operations

For a list of operations associated with this Web service, see Table 12

Table 12.   SWIContactServices Operations

Name	Description
SWIContactServicesInsertOrUpdate	Inserts or updates the contact information in the Siebel business application as sent by the third-party application

Table 12.   SWIContactServices Operations

Name	Description
SWIContactServicesQueryByExample	Queries for contact information in the Siebel business application as requested by the third-party application
SWIContactServicesSynchronize	Synchronizes the contact information in the Siebel business application with the contact information in the third-party application

Request Message Description: SWIContactServicesInsertOrUpdate

For a description of this request message, see Table 13.

Table 13.   Request Message Description: SWIContactServicesInsertOrUpdate

Node	Description	Type
SiebelMessage	Required	Integration Object
StatusObject	Optional	String

Response Message Description: SWIContactServicesInsertOrUpdate

For a description of this response message, see Table 14.

Table 14.   Response Message Description: SWIContactServicesInsertOrUpdate

Node	Description	Type
SiebelMessage	Required	Integration Object

Request Message Description: SWIContactServicesQueryByExample

For a description of this request message, see Table 15.

Table 15.   Request Message Description: SWIContactServicesQueryByExample

Node	Description	Type
SiebelMessage	Required	Integration Object

Response Message Description: SWIContactServicesQueryByExample

For a description of this response message, see Table 16.

Table 16.   Response Message Description: SWIContactServicesQueryByExample

Node	Description	Type
SiebelMessage	Required	Integration Object

Request Message Description: SWIContactServicesSynchronize

For a description of this request message, see Table 17.

Table 17.   Request Message Description: SWIContactServicesSynchronize

Node	Description	Type
SiebelMessage	Required	Integration Object
StatusObject	Optional	String

Response Message Description: SWIContactServicesSynchronize

For a description of this response message, see Table 18.

Table 18.   Response Message Description: SWIContactServicesSynchronize

Node	Description	Type
SiebelMessage	Required	Integration Object

SWIContactServices Application Interface

This topic describes the application objects called by this Web service. For more information on application implementation, refer to your application development documentation on Oracle Technology Network.

Service Object (Business Service or Workflow)

For a description of the service objects for this Web service, see Table 19.

Table 19.   SWIContactServices Service Object

Siebel Repository Name	Boundary Object Type	Class
SWI Contact Service	Business Service	CSSEAIDataSyncService

Data Object (Integration Object)

For a description of the data object for this Web service, see Table 20.

Table 20.   SWIContactServices Data Object

Siebel Repository Name	External Name
SWIContactIOSWI	Contact

Methods

For a description of the methods for this Web service, see Table 21.

Table 21.   SWIContactServices Methods

Operation	Method
SWIContactServicesInsertOrUpdate	InsertOrUpdate
SWIContactServicesQueryByExample	QueryByExample
SWIContactServicesSynchronize	Synchronize

SWICustomerParty Web Service

Use this inbound Web service to perform basic operations on the account record, such as insert,
update, query and synchronize. Its namespace is:

http://siebel.com/asi/V0

SWICustomerParty Operations

For a list of operations associated with this Web service, see Table 22.

Table 22.   SWICustomerParty Operations

Name	Description
SWICustomerPartyInsertOrUpdate	Inserts or updates the account information in the Siebel business application as sent by the third-party application

Table 22.   SWICustomerParty Operations

Name	Description
SWICustomerPartyQueryByExample	Queries the account information in the Siebel business application as requested by the third-party application
SWICustomerPartySynchronize	Synchronizes the account information in the Siebel business application with the account information in the third-party application

Request Message Description: SWICustomerPartyInsertOrUpdate

For a description of this request message, see Table 23.

Table 23.   Request Message Description: SWICustomerPartyInsertOrUpdate

Node	Description	Type
SiebelMessage	Required	Integration Object
StatusObject	Optional	String

Response Message Description: SWICustomerPartyInsertOrUpdate

For a description of this response message, see Table 24.

Table 24.   Response Message Description: SWICustomerPartyInsertOrUpdate

Node	Description	Type
SiebelMessage	Required	Integration Object

Request Message Description: SWICustomerPartyQueryByExample

For a description of this request message, see Table 25.

Table 25.   Request Message Description: SWICustomerPartyQueryByExample

Node	Description	Type
SiebelMessage	Required	Integration Object

Response Message Description: SWICustomerPartyQueryByExample
For a description of this response message, see Table 26.

Table 26.   Response Message Description: SWICustomerPartyQueryByExample

Node	Description	Type
SiebelMessage	Required	Integration Object

Request Message Description: SWICustomerPartySynchronize
For a description of this request message, see Table 27.

Table 27.   Request Message Description: SWICustomerPartySynchronize

Node	Description	Type
SiebelMessage	Required	Integration Object
StatusObject	Optional	String

Response Message Description: SWICustomerPartySynchronize
For a description of this response message, see Table 28.

Table 28.   Response Message Description: SWICustomerPartySynchronize

Node	Description	Type
SiebelMessage	Required	Integration Object

SWICustomerParty Application Interface
This topic describes the application objects called by this Web service. For more information on
application implementation, refer to your application development documentation on Oracle
Technology Network.

Service Object (Business Service or Workflow)
For a description of the service objects for this Web service, see Table 29.

Table 29.   SWICustomerParty Service Object

Siebel Repository Name	Boundary Object Type	Class
SWI Customer Party Service	Business Service	CSSEAIDataSyncService

Data Object (Integration Object)

For a description of the data object for this Web service, see Table 30.

Table 30.   SWICustomerParty Data Object

Siebel Repository Name	External Name
SWICustomerPartyIO	Account

Methods

For a description of the methods for this Web service, see Table 31.

Table 31.   SWICustomerParty Methods

Operation	Method
SWICustomerPartyInsertOrUpdate	InsertOrUpdate
SWICustomerPartyQueryByExample	QueryByExample
SWICustomerPartySynchronize	Synchronize

SWILocationServices Web Service

Use this Web service to perform the following basic operations on locations:

■ Back up location

■ Query location

Its namespace is:

http://siebel.com/asi/V0

SWILocationServices Operations

For a list of operations associated with this Web service, see Table 32.

Table 32.   SWILocationServices Operations

Name	Description
SWILocationQuery	Queries the location information in the Siebel business application as requested by the third-party application
SWILocationSynchronize	Synchronizes the location information in the Siebel business application with the location information in the third-party application

Request Message Description: SWILocationQuery

For a description of this request message, see Table 33.

Table 33.   Request Message Description: SWILocationQuery

Node	Description	Type
PrimaryRowId	Required	String

Response Message Description: SWILocationQuery

For a description of this response message, see Table 34.

Table 34.   Response Message Description: SWILocationQuery

Node	Description	Type
SiebelMessage	Required	Integration Object

Request Message Description: SWILocationSynchronize

For a description of this request message, see Table 35.

Table 35.   Request Message Description: SWILocationSynchronize

Node	Description	Type
SiebelMessage	Required	Integration Object
StatusObject	Optional	String

Response Message Description: SWILocationSynchronize

For a description of this response message, see Table 36.

Table 36.   Response Message Description: SWILocationSynchronize

Node	Description	Type
SiebelMessage	Required	Integration Object

SWILocationServices Application Interface

This topic describes the application objects called by this Web service. For more information on
application implementation, refer to your application development documentation on Oracle
Technology Network.

Service Object (Business Service or Workflow)

For a description of the service objects for this Web service, see Table 37.

Table 37.   SWILocationServices Service Object

Siebel Repository Name	Boundary Object Type	Class
SWI Location Adapter	Business Service	CSSEAIDataSyncService

Data Object (Integration Object)

For a description of data objects for this Web service, see Table 38.

Table 38.   SWILocationServices Data Object

Siebel Repository Name	External Name
SWIFMLocationIOFM	Location

Methods

For a description of the methods for this Web service, see Table 39.

Table 39.   SWILocationServices Methods

Operation	Method
SWILocationQuery	QueryById
SWILocationSynchronize	Synchronize

SWILocationSync Web Service

Use this outbound Web service to submit an order into the queue. Its namespace is:

http://siebel.com/asi

SWILocationSync Operations

For a list of operations associated with this Web service, see Table 40.

Table 40.   SWILocationSync Operations

Name	Description
SyncTransportationStopList	Submits the location request in the Siebel business application into the asynchronous queue of the third-party application

Request Message Description: SyncTransportationStopList

For a description of this request message, see Table 41.

Table 41.   Request Message Description: SyncTransportationStopList

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SWILocationSyncReqMsg:Sync TransportationStopList	Optional	Integration Object

Response Message Description: SyncTransportationStopList

Not applicable.

SWILocationSync Application Interface

This topic describes the application objects called by this Web service. For more information on application implementation, refer to your application development documentation on Oracle Technology Network.

Service Object (Business Service or Workflow)

For a description of the service objects for this Web service, see Table 42.

Table 42.   SWILocationSync Service Object

Siebel Repository Name	Boundary Object Type	Class
SWILocationSync	Business Service	CSSWSOutboundDispatcher
SWISendLocation	Workflow	Not applicable?

Data Object (Integration Object)

For a description of the data object for this Web service, see Table 43.

Table 43.   SWILocationSync Data Object

Siebel Repository Name	External Name
SWIFMLocationIOFM	Location

Method

For a description of the method for this Web service, see Table 44.

Table 44.   SWILocationSync Method

Operation	Method
SyncTransportationStopList	SyncTransportationStopList

SWIOrderUpsert Web Service

Use this Web service to perform the following basic operation on sales orders.

■ Back up order.

■ Update or insert order (upsert).

■ Cascade down update order.

■ Create an auto asset from the order.

Its namespace is:

http://siebel.com/asi/

SWIOrderUpsert Operations

For a list of operations associated with this Web service, see Table 45.

Table 45.   SWIOrderUpsert Operations

Name	Description
SWIOrderUpsert	Inserts or updates order information in the Siebel business application as sent by the third-party application

Request Message Description: SWIOrderUpsert

For a description of this request message, see Table 46.

Table 46.   Request Message Description: SWIOrderUpsert

Node	Description	Type
SWIOrderIO	Required	Integration Object
Auto-Asset Flag	Optional	String
Backup Order Flag	Optional	String
Cascade Down Flag	Optional	String

Response Message Description: SWIOrderUpsert

For a description of this response message, see Table 47.

Table 47.   Response Message Description: SWIOrderUpsert

Node	Description	Type
SWIOrderIO	Required	Integration Object

SWIOrderUpsert Application Interface

This topic describes the application objects called by this Web service. For more information on application implementation, refer to your application development documentation on Oracle Technology Network.

Service Object (Business Service or Workflow)

For a description of the service objects for this Web service, see Table 48.

Table 48.   SWIOrderUpsert Service Object

Siebel Repository Name	Boundary Object Type	Class
SWIOrderupsert	Work Flow	Not applicable

Data Object (Integration Object)

For a description of the data object for this Web service, see Table 49.

Table 49.   SWIOrderUpsert Data Object

Siebel Repository Name	External Name
SWIOrderIO	PDS Simplified Order

Method

Not applicable.

SWIProductImport Web Service

Use this inbound Web service to perform the basic operations on the product record, such as insert, or update (upsert). Its namespace is:

http://siebel.com/asi/V0

SWIProductImport Operations

For a list of operations associated with this Web service, see Table 50.

Table 50.   SWIProductImport Operations

Name	Description
SWIProductImportUpsert	Inserts or updates the product information in the Siebel business application as sent by the third-party application

Request Message Description: SWIProductImportUpsert

For a description of this request message, see Table 51.

Table 51.   Request Message Description: SWIProductImportUpsert

Node	Description	Type
SiebelMessage	Required	Integration Object

Response Message Description: SWIProductImportUpsert

For a description of this response message, see Table 52.

Table 52.   Response Message Description: SWIProductImportUpsert

Node	Description	Type
SiebelMessage	Required	Integration Object

SWIProductImport Application Interface

This topic describes the application objects called by this Web service. For more information on application implementation, refer to your application development documentation on Oracle Technology Network.

Service Object (Business Service or Workflow)

For a description of the service objects for this Web service, see Table 53.

Table 53.   SWIProductImport Service Object

Siebel Repository Name	Boundary Object Type	Class
SWI Product Import	Business Service	CSSCMUProdWebSvc

Data Object (Integration Object)

For a description of the data object for this Web service, see Table 54.

Table 54.   SWIProductImport Data Object

Siebel Repository Name	External Name
SWIProductIntegrationIO	SWI Product Integration

Method

For a description of the method for this Web service, see Table 55.

Table 55.   SWIProductImport Method

Operation	Method
SWIProductImport	UpsertInsertOrUpdate

SWISubmitOrder Web Service

Use this outbound Web service to submit an order into the queue. Its namespace is:

http://siebel.com/asi

SWISubmitOrder Operations

For a list of operations associated with this Web service, see Table 56.

Table 56.   SWISubmitOrder Operations

Name	Description
process	Submits the order information in the Siebel business application into the asynchronous queue of the third-party application

Request Message Description: process

For a description of this request message, see Table 57.

Table 57.   Request Message Description: process

Node	Description	Type
CustomHeaderContext	OptionalHierarchy	Not applicable
SWISubmitOrderReqMsg: ListOfSWIOrderIO	Optional	Integration Object

Response Message Description: process

Not applicable.

SWISubmitOrder Application Interface

This topic describes the application objects called by this Web service. For more information on application implementation, refer to your application development documentation on Oracle Technology Network.

Service Object (Business Service or Workflow)

For a description of the service objects for this Web service, see Table 58.

Table 58.   SWISubmitOrder Service Object

Siebel Repository Name	Boundary Object Type	Class
SWISubmitOrder	Business Service	CSSWSOutboundDispatcher
SWISendOrder	Workflow	Not applicable.

Data Object (Integration Object)

For a description of data objects for this Web service, see Table 59.

Table 59.   SWISubmitOrder Data Object

Siebel Repository Name	External Name
SWIOrderIO	PDS Simplified Order

Method

For a description of the method for this Web service, see Table 60.

Table 60.   SWISubmitOrder Method

Operation	Method
process	process

SWISyncProduct Web Service

Use this outbound Web service to submit a product to the queue. Its namespace is:

http://siebel.com/asi

SWISyncProduct Operations

For a list of operations associated with this Web service, see Table 61.

Table 61.   SWISyncProduct Operations

Name	Description
SyncItemList	Submits the product information in the Siebel business application into the asynchronous queue of the third-party application

Request Message Description: SyncItemList

For a description of this request message, see Table 62.

Table 62.   Request Message Description: SyncItemList

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SWISyncProductReqMsg: SyncItemList	Optional	Integration Object

Response Message Description: SyncItemList

Not applicable.

SWISyncProduct Application Interface

This topic describes the application objects called by this Web service. For more information on application implementation, refer to your application development documentation on Oracle Technology Network.

Service Object (Business Service or Workflow)

For a description of the service objects for this Web service, see Table 63.

Table 63.   SWISyncProduct Service Object

Siebel Repository Name	Boundary Object Type	Class
SWISyncProduct	Business Service	CSSWSOutboundDispatcher
SWIExternalProductRequestWF	Workflow	Not applicable

Data Object (Integration Object)

For a description of the data object for this Web service, see Table 64.

Table 64.   SWISyncProduct Data Object

Siebel Repository Name	External Name
SWIAdminISSProductDefinitionIOSWI	Admin ISS Product Definition IO

Method

For a description of the method for this Web service, see Table 65.

Table 65.   SWISyncProduct Method

Operation	Method
SyncItemList	SyncItemList

SyncCustomerSiebelEventAggregator Web Service

Use this outbound Web service to update the account, contact, address, and billing profile in the third party application. Its namespace is:

http://xmlns.oracle.com/ABCS/Siebel/Core/SyncCustomerSiebelEventAggregator/V1

SyncCustomerSiebelEventAggregator Operations

For a list of operations associated with this Web service, see Table 66.

Table 66.   SyncCustomerSiebelEventAggregator Operations

Name	Description
aggregateaccountevent	Synchronizes the account
aggregatecontactevent	Synchronizes the contact
aggregateaddressevent	Synchronizes the address
aggregatebpevent	Synchronizes the billing profile

Request Message Description: aggregateaccountevent

For a description of this request message, see Table 67.

Table 67.   Request Message Description: aggregateaccountevent

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SiebelAccountEventReqMsg: ListOfSwicustomerpartyio	Optional	Integration Object

Response Message Description: aggregateaccountevent

For a description of this response message, see Table 68.

Table 68.   Response Message Description: aggregateaccountevent

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SiebelAccountEventReqMsg: ListOfSwicustomerpartyio	Optional	Integration Object
XMLHierarchyOutput	Optional	Hierarchy
faultactor	Optional	String
faultcode	Optional	String
faultstring	Optional	String

Request Message Description: aggregatecontactevent

For a description of this request message, see Table 69.

Table 69.   Request Message Description: aggregatecontactevent

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SiebelAccountEventReqMsg: ListOfSwicustomerpartyio	Optional	Integration Object

Response Message Description: aggregatecontactevent

For a description of this response message, see Table 70.

Table 70.   Response Message Description: aggregatecontactevent

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SiebelAccountEventReqMsg: ListOfSwicustomerpartyio	Optional	Integration Object
XMLHierarchyOutput	Optional	Hierarchy
faultactor	Optional	String
faultcode	Optional	String
faultstring	Optional	String

Request Message Description: aggregateaddressevent

For a description of this request message, see Table 71.

Table 71.   Request Message Description: aggregateaddressevent

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SiebelAccountEventReqMsg: ListOfSwicustomerpartyio	Optional	Integration Object

Response Message Description: aggregateaddressevent
For a description of this response message, see Table 72.

Table 72.   Response Message Description: aggregateaddressevent

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SiebelAccountEventReqMsg: ListOfSwicustomerpartyio	Optional	Integration Object
XMLHierarchyOutput	Optional	Hierarchy
faultactor	Optional	String
faultcode	Optional	String
faultstring	Optional	String

Request Message Description: aggregatebpevent
For a description of this request message, see Table 73.

Table 73.   Request Message Description: aggregatebpevent

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SiebelAccountEventReqMsg: ListOfSwicustomerpartyio	Optional	Integration Object

Response Message Description: aggregatebpevent
For a description of this response message, see Table 74.

Table 74.   Response Message Description: aggregatebpevent

Node	Description	Type
CustomHeaderContext	Optional	Hierarchy
SiebelAccountEventReqMsg: ListOfSwicustomerpartyio	Optional	Integration Object
XMLHierarchyOutput	Optional	Hierarchy
faultactor	Optional	String
faultcode	Optional	String
faultstring	Optional	String

SyncCustomerSiebelEventAggregator Application Interface

This topic describes the application objects called by this Web service. For more information on application implementation, refer to your application development documentation on Oracle Technology Network.

Service Object (Business Service or Workflow)

For a description of the service objects for this Web service, see Table 75.

Table 75.   SyncCustomerSiebelEventAggregator Service Object

Siebel Repository Name	Boundary Object Type	Class
SyncCustomerSiebelEventAggregator	Business Service	CSSWSOutboundDispatcher
SWI Account Update Workflow	Workflow	Not applicable.
SWI Address Update Workflow	Workflow	Not applicable.
SWI Billing Profile Update Workflow	Workflow	Not applicable.
SWI Contact Update Workflow	Workflow	Not applicable.

Data Objects (Integration Object)

For a description of data objects for this Web service, see Table 76.

Table 76.   SyncCustomerSiebelEventAggregator Data Objects

Siebel Repository Name	External Name
SWICustomerPartyIO	Account
SWIAddressIO	SWI Address
SWIBillingProfileIO	CMU - Com Invoice Profile
SWIContactIO	SWI Contact

Methods

For a description of the methods for this Web service, see Table 77.

Table 77.   SyncCustomerSiebelEventAggregator Methods

Operation	Method
aggregateaccountevent	aggregateaccountevent
aggregatecontactevent	aggregatecontactevent
aggregateaddressevent	aggregateaddressevent
aggregatebpevent	aggregatebpevent

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