

**Oracle® Retail Order Broker**  
Administration Guide  
Release 16.0  
**E85976-04**

**October 2017**

Oracle® Retail Order Broker Administration Guide, Release 16.0

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Oracle Retail Order Broker Administration Guide, Release 16.0

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# Preface

The Oracle Retail Order Broker Administration Guide describes the process an administrator follows to set up essential data for the Routing Module.

## Audience

This Administration Guide is intended for administrators who are responsible for system configuration.

## Documentation Accessibility

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<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Related Documents

For more information, see the following documents in the Oracle Retail Order Broker Release 16.0 documentation set:

- *Oracle Retail Order Broker Release Notes*
- *Oracle Retail Order Broker Operations Guide*
- *Oracle Retail Order Broker Online Help*
- *Oracle Retail Order Broker Vendor Portal Online Help*
- *Oracle Retail Order Broker Store Connect Online Help*
- *Oracle Retail Order Broker Installation Guide*
- *Oracle Retail Order Broker Upgrade Installation Guide*
- *Oracle Retail Order Broker Security Guide*

See the Oracle Retail Order Broker 16.0 documentation library at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

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- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 16.0) or a later patch release (for example, 16.1.1). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

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If a more recent version of a document is available, that version supersedes all previous versions.

## Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

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## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, emphasis, screen names, book titles, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates field labels or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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# Setting Up Data

**Purpose:** Follow the steps below to set up data for the Routing Module as part of Oracle Retail Order Broker installation. The Routing Module enables you to search for locations to fulfill orders, create orders across the enterprise, and track order activity.

**Other setup steps and options:** See the Online Help for more information on setting up data, including steps for configuration of the Routing Engine, as well as steps required for:

- configuring the Supplier Direct Fulfillment module
- configuring the Store Connect module
- additional configuration options, such as probability rules and zone fulfillment
- testing operations, such as searching for locations and creating orders
- details on importing and exporting data, including additional import and export options
- changing the time zone for screens, reports, emails, and order update history

**In this chapter:**

- [Before You Start](#) on page 1-2
- [Creating Each Additional System that will Integrate with Oracle Retail Order Broker](#) on page 1-7
- [Configuring Tenant Settings](#) on page 1-2
- [Creating an Organization](#) on page 1-3
- [Creating the Default System](#) on page 1-4
- [Creating Each Additional System that will Integrate with Oracle Retail Order Broker](#) on page 1-7
- [Creating Additional User Profiles](#) on page 1-7
- [Select the Default Shipping System for the Admin User](#) on page 1-10
- [Uploading Proximity Data](#) on page 1-11
- [Creating Location Types](#) on page 1-12
- [Creating the Default Unfulfillable Location](#) on page 1-12
- [Setting up a Default Carrier and, Optionally, Additional Carriers](#) on page 1-13
- [Setting up Preferences for an Organization](#) on page 1-14

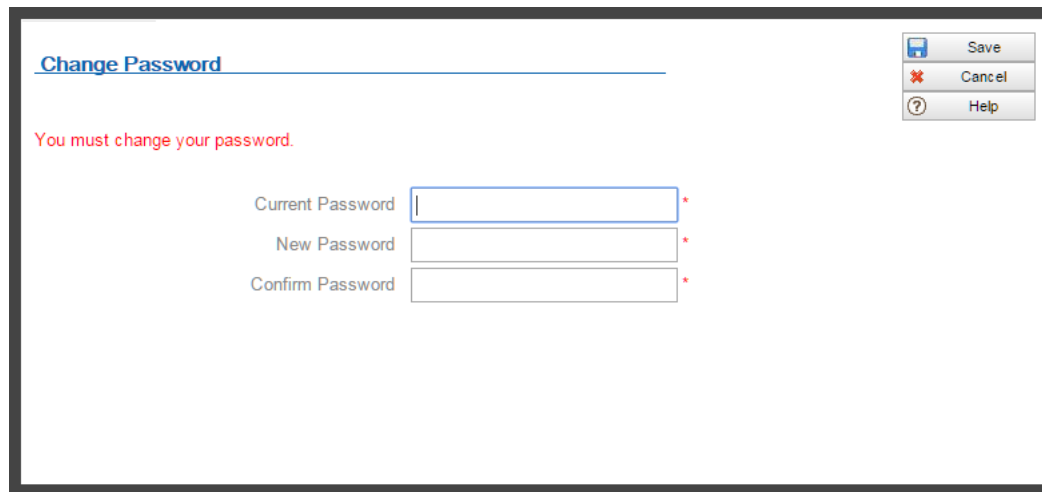
- [Scheduling Imports](#) on page 1-17
- [Setting up Web Service Authentication](#) on page 1-20

## Before You Start

Before you begin configuration of Oracle Retail Order Broker, you need to complete the steps described in the Oracle Retail Order Broker Installation Guide.

## Logging in for the First Time

**Change password:** The first time you log in as the default Admin user, you need to change the password from the default created during the installation process.



**Change Password**

You must change your password.

Current Password  \*

New Password  \*

Confirm Password  \*

Save Cancel Help

Complete the **Change Password** window:

1. **Current Password:** Enter the current password
2. **New Password and Confirm Password:** Enter the new password. Your password:
  - must be from 8 to 25 characters long
  - cannot contain any spaces
  - must include at least 1 numeric character
  - must include at least 1 letter
  - must include at least 1 special character
  - cannot be the same as your user ID
  - is case-sensitive (A is not the same as a)
  - must be changed at least every 90 days, and each new password cannot be the same as your previous 4 passwords
3. Click **Save**.

## Configuring Tenant Settings

**About Tenant settings:** Use the **Tenant - Admin** screen to work with enterprise-level settings for Oracle Retail Order Broker, including:

- the Order Broker module(s) used
- the number of minutes that Order Broker should wait before generating emails
- the logo to display in Store Connect
- the location of the WSDL used for the vendor integration
- the timeout interval for Order Broker user sessions
- the number of unsuccessful login attempts before Order Broker disables a user ID
- email settings, including the location of templates and generation interval (both required)
- cleanup of logs, generated documents such as reports and pack slips, and product import files
- paths for folders used for uploads, import, and export
- the Geocode URL, if you use the Oracle Maps Cloud Service for proximity location
- proxy server for communication with ADSI, or with an integrated system for interactive inventory update request

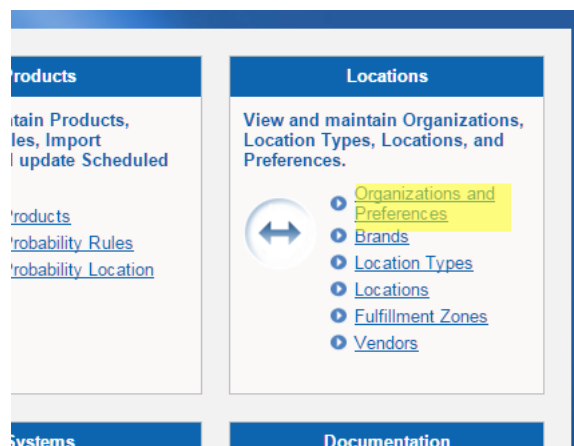
**For more information:** See the **Tenant - Admin** screen in the Online Help for a description of the fields at this screen.

## Creating an Organization

**About organizations:** The organization is the second level in the Oracle Retail Order Broker hierarchy, below the tenant. All systems are assigned to a single organization, and item searching, order creation, and drop ship fulfillment takes place within the organization. You need at least one organization.

**For more information:** See the **Order Broker Routing Engine Overview** in the Online Help for a discussion of the organization hierarchy.

1. Select **Organizations and Preferences** at the home screen.



2. At the **Organizations and Preferences** screen:

- Enter the organization code in the *Organization* field. The organization code can be 1 to 10 positions long, can include spaces and special characters, and must be unique within Order Broker.

- Enter the name for the organization in the *Name* field. The name can be from 1 to 35 positions long, and can include spaces and special characters.
- Click **New**.

**Organizations and Preferences**

Organization:  Name:

**Search Results**

- At the **New Organization** screen:
  - \* Confirm your entries in the *Organization* and *Name* fields.
  - \* If ship-for-pickup orders will not be enabled, set the *Enable Ship For Pickup* option to **No**.

**Important:** See the Routing Engine Overview in the Operations Guide or the online help for considerations on enabling ship-for-pickup.

- \* Complete the **Data Formats** fields to control the formats for system-generated emails.

**New Organization**

Organization Example

Name:

Enable Ship For Pickup:  Yes  No

This setting controls whether to support ship-for-pickup orders rather than retail pickup and ship-to-store orders. The ship-for-pickup order type can use a sourcing location that is different from the placed location or the pickup location.

No: Select only if your external system does not support a separate sourcing location, and you need to process retail pickup and ship-to-store orders.

Yes: Select to support a single ship-for-pickup order type. Once you select this setting, you cannot reverse it.

**Data Formats**

Language:  \*

Date Format:  \*

Time Format:  \*

Decimal Separator:  \*

Thousands Separator:  \*

- \* Click **Save**.

Creating the Default System

**About systems:** Each system in Oracle Retail Order Broker represents an application, such as Oracle Retail Order Management System Cloud Service, CWDirect, or Xstore, that shares inventory information via Oracle Retail Order Broker and creates cross-channel orders or purchase orders.

**About the default system:** The default system identifies the application that is the system of record for product creation and naming. The first system created for your organization is automatically flagged as the default. System product codes in other systems are cross references to the products in the default system.

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**Note:** If you integrate with Oracle Retail Order Management System Cloud Service or with CWDirect, the system code should be the same as the company number, without padding zeros. For example, 6 rather than 006. Also, the code for the system must match the setting of the *Locate System (K50)* system control value.

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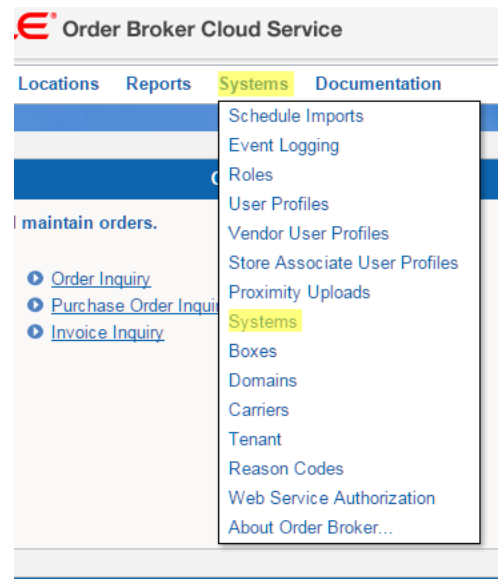
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**Note:** The system flagged as the Vendor Default should not be the default system for the organization.

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1. Select **Systems > Systems** to advance to the **Systems** screen.



2. At the **System** screen:
3. Select an organization from the *Organization* drop-down box.
  - Enter a system code in the *System* field. System codes can be 1 to 10 positions in length, can include spaces and special characters, and must be unique.
  - For Order Management System or CWDirect, the system code should be the same as the company number, without padding zeros.

- Optionally, enter a name in the *Name* field. Names can be 1 to 40 positions in length and can include spaces and special characters. If you do not enter a name here, you need to enter it at the System screen when creating a system.

The screenshot shows a web interface for searching systems. At the top, there are 'Search' and 'New' buttons. Below them are three input fields: 'Organization' (a dropdown menu showing 'New - New'), 'System' (a text box containing '1234'), and 'Name' (a text box containing 'System Name'). Below the search fields is a 'Search Results' section with a table header containing columns: 'Organiz...', 'System', 'Name', 'Online', 'Default', 'Edit', and 'Delete'.

- Click **New**. If:
  - \* The system already exists in the organization, or if you did not select an organization or enter a *System* code, Order Broker displays an error message;
  - \* Otherwise, you advance to the **System** screen, where you can complete the creation of the system.

The screenshot shows the 'System' configuration screen. It has a title bar with 'Systems' and 'System' tabs. The main area contains several fields: 'Organization' (dropdown menu with 'EZK - Sample Organization'), 'System' (text box with 'sample'), and 'Name' (text box with 'sample system'). Below these are three checkboxes: 'Organization Default' (checked), 'Vendor Default' (unchecked), and 'Store Connect Default' (unchecked). At the bottom, there are several tabs: 'Inventory', 'Fulfillment', 'Reservation', 'Probable Qty Export', 'Incremental Inv Import', and 'Fulfilled Inv Export'. Under the 'Fulfillment' tab, there are more fields: 'Online' (checkbox, unchecked), 'Probable Qty Export' (checkbox, unchecked), 'Track Fulfilled Qty' (dropdown menu with 'Do Not Track Fulfilled'), and 'Connection Type' (dropdown menu with 'None'). A 'Save' button is highlighted in yellow, and a 'Cancel' button is also visible.

### Note:

- If you click **Cancel** at the **System** screen after clicking **New**, the system is not created.
- The *Organization Default* flag is selected when you create the first system for an organization, and the flag cannot be unselected at this time. To designate a different system as the default, you need to create another system and flag that system as the default; this unflags the first system.

**Order Management System or CWDirect integration:** The code for the Order Management System or CWDirect system must match the setting of the *OROB System (K50)* or *Locate System (K50)* system control value. However, names for systems do not need to be the same as the Order Management System or CWDirect company descriptions.

**For more information:** See the **System** screen in the Online Help for information on additional system configuration options.

## Creating Each Additional System that will Integrate with Oracle Retail Order Broker

Use the Systems and System screen, as displayed above, to create:

- a default vendor system, if you will use the Supplier Direct Fulfillment module

**Note:** The system flagged as the Vendor Default should not be the default system for the organization.

- the Store Connect system, if you will use the Store Connect module
- each additional system, such as a POS system

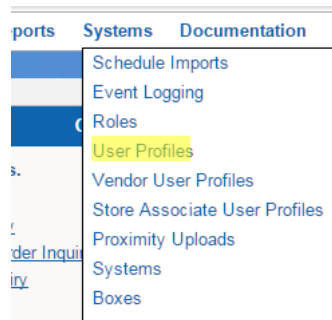
**For more information:** See the **System** screen in the Online Help for information on the fields and options available at this screen.

## Creating Additional User Profiles

**About user profiles:** Follow these steps to enable users to log into Oracle Retail Order Broker, and to set authority levels controlling the screens available to each user.

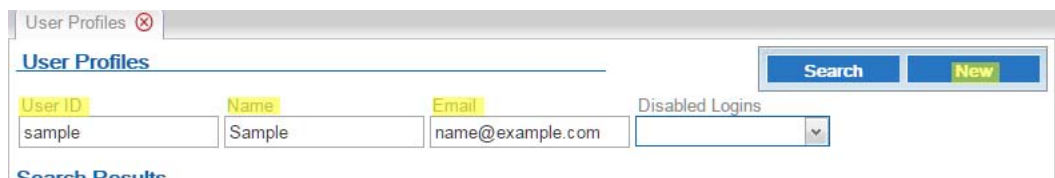
**Delivered roles:** Order Broker is delivered with predefined roles. Make sure to review the authority associated with these roles prior to assigning them to a user.

1. Select **Systems > User Profiles**.



2. At the **User Profiles** screen, enter:

- a *User ID* of up to 10 positions.
- a *Name* of up to 30 positions.
- optionally, an *Email* address of up to 50 positions.
- Select **New**.



3. At the **User Profile Configuration** screen:

- if not using LDAP authentication, enter and confirm the initial, temporary password for the user to use when first logging into Oracle Retail Order Broker.

The screenshot shows the 'User Profile Configuration' web interface. At the top, there are two tabs: 'User Profiles' and 'User Profile Configuration'. Below the tabs is the title 'User Profile Configuration'. The main content area has two sub-tabs: 'Preferences' and 'Authority'. A 'Save' button is located in the top right corner. Under the 'User' section, there are several input fields: 'User ID' (containing 'sample'), 'Name' (containing 'Sample'), 'Email' (empty), 'Active' (checked checkbox), 'Use LDAP' (unchecked checkbox), 'Password' (empty), and 'Confirm Password' (empty). The 'Password' and 'Confirm Password' fields are highlighted in yellow. Below the 'User' section is the 'Preferences' section, which includes a 'Default Shipping System' dropdown menu. Red asterisks are placed to the right of the 'User ID', 'Name', 'Password', 'Confirm Password', and 'Default Shipping System' fields, indicating required fields.

**Password requirements:** The password:

- \* must be from 8 to 25 characters long
- \* cannot contain any spaces
- \* must include at least 1 numeric character
- \* must include at least 1 letter
- \* must include at least 1 special character
- \* cannot be the same as the user ID

The first time the user logs in, Oracle Retail Order Broker requires that the user reset the password, as described above under [Creating Each Additional System that will Integrate with Oracle Retail Order Broker](#) on page 1-7.



- otherwise, if using LDAP authentication, select the *Use LDAP* flag and confirm the domain and the LDAP user ID, if necessary.

User Profiles [X] User Profile Configuration [X]

**User Profile Configuration**

Preferences Authority

**User**

User ID  \*

Name  \*

Email

Active

Use LDAP

Domain  \*

LDAP User Id

**Preferences**

Default Shipping System

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**Note:** In order to use LDAP authentication, you need to complete configuration of the **Domain**. See the **Domain** screen in the Online Help for more information.

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- under the **Preferences** tab, select the user's *Default Shipping System* to control the system product code to display when the user reviews an order.

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**Note:** The *Default Shipping System* is not required if you have not yet created any systems in Oracle Retail Order Broker.

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User Profile Configuration

Preferences Authority

**User**

User ID  \*

Name  \*

Email

Active

Use LDAP

Password  \*

Confirm Password  \*

**Preferences**

Default Shipping System

## Select the Default Shipping System for the Admin User

- if necessary, change the **Data Formats** settings for the user to change the display of dates, times, and numbers on Order Broker screens from their default settings.

The screenshot shows the 'Preferences' section with a dropdown menu for 'Default Shipping System' set to '257 - OMS 257'. Below it, the 'Data Formats' section includes four dropdown menus: 'Date Format' (MM/DD/YYYY), 'Time Format' (AM/PM), 'Decimal Separator' (Period), and 'Thousands Separator' (Comma). Each dropdown menu has a red asterisk to its right.

- use the **Authority** tab to select a role that provides the user with required authority.

The screenshot shows the 'User Profile Configuration' window for 'User ID sample'. The 'Authority' tab is selected, showing a list of 'Eligible Roles' (Order Inquiry, Order Maintenance) and an empty 'Assigned Roles' list. A 'Save' button is visible in the top right corner.

- Select **Save**.

### More options:

- *Create vendor user profiles or store associate user profiles:* See **Vendor User Profiles** in the Online Help if you will use the Supplier Direct Fulfillment module, or see **Store Associate User Profiles** in the Online Help if you will use the Store Connect user profile.
- *Create additional roles:* Oracle Retail Order Broker includes delivered roles for Order Broker, vendor, and store associate user profiles. See **Roles** in the Online Help for details on the delivered roles, and see the **Role Wizard** in the Online Help for instructions on creating new roles that you can assign to users.

## Select the Default Shipping System for the Admin User

Use the steps described above under [Creating Additional User Profiles](#) on page 1-7 to assign a *Default Shipping System* to the Admin user. The *Default Shipping System* field

indicates the system product code to display on Order Broker screens for the user, and is required once you have created any systems in Order Broker.

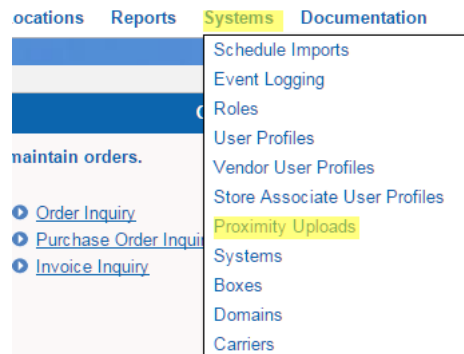
## Uploading Proximity Data

**About proximity data:** Proximity data enables you to search for merchandise or assign orders based on the approximate distance from a store, warehouse, or customer address.

**Note:** This step is required only if you are using proximity locator searching for locations through the Routing Engine, and only if you are not using the Oracle Maps Cloud Service. You can also perform this step at a later time.

If you are using Proximity Locator searching to restrict locate items searches or order assignment based on geographical location, and if you are not using the Oracle Maps Cloud Service, obtain the required .CSV file of postal code information before you begin the upload:

1. Select **Systems > Proximity Uploads**.



2. At the **Proximity Uploads** screen:

- Select **Canada, International, or United States** from the *Proximity Data Type* drop-down list.
- Enter the *Country Code* to apply to proximity records.
- Use the **Choose Files...** button below the *File Name* field to select the .CSV file on your local computer.
- Select **Upload**.



3. Wait until the upload status is completed. Optionally, you can select **Refresh** to check the status.

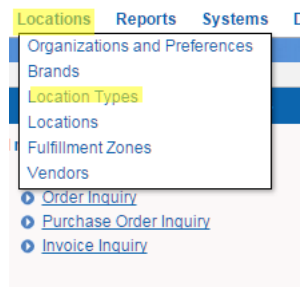
**For more information:** See the **Proximity Uploads** screen in the Online Help for more information, including the file layout and troubleshooting. Also, see the **Order Broker Routing Engine Overview** in the Online Help for a discussion of proximity locator searching and preferences.

## Creating Location Types

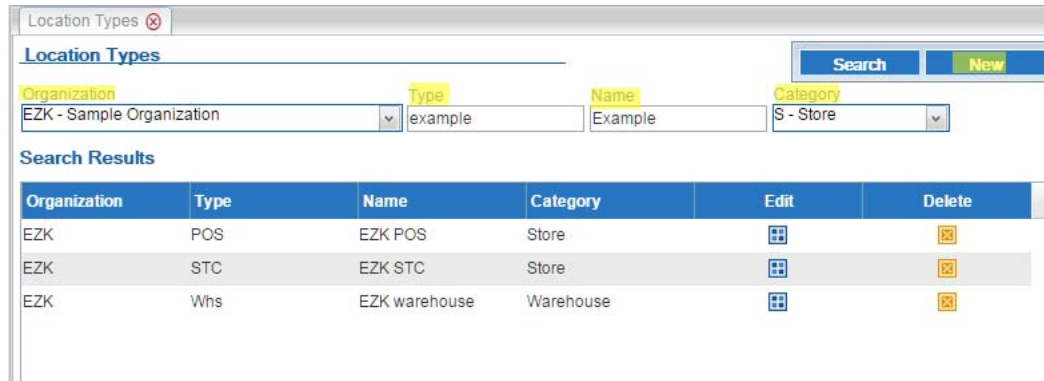
**About location types:** Location types identify a group of locations based on the system to which they belong, such as your order management system or your POS system, as well as their function, such as distribution center or retail store.

At least one location type is required for you to create locations.

1. Select **Locations > Location Types**.



2. At the **Location Types** screen, select your organization at the *Organization* drop-down box, if necessary.



3. In the *Type* field, enter a code to represent the location type. The code cannot exceed 10 positions.
4. In the *Name* field, enter a name for the location type. The name cannot exceed 40 positions.
5. Select the correct category from the *Category* drop-down box.
6. Select **New**.

## Creating the Default Unfulfillable Location

**About the default unfulfillable location:** The Routing Engine assigns an order to the default unfulfillable location when it cannot find a location to fulfill the order. You need to specify a default unfulfillable location at the **Preferences** screen.

1. Select **Locations > Locations**.
2. At the **Locations** screen:
  - Select your organization if necessary.
  - In the *Type* field, select the location type. The default unfulfillable location is ordinarily a warehouse or distribution center type.
  - In the *Location* field, enter a location code. The code cannot exceed 10 positions.
  - In the *Name* field, enter a name for the location. The name cannot exceed 40 positions.
  - In the *System* field, select the default system for your organization.
  - Select **New**.
3. At the **New Location** screen, enter any additional information about the default unfulfillable location, and select **Save** to save your entries.

**For more information:** See [Setting up Preferences for an Organization](#) on page 1-14 for information on identifying the default unfulfillable location for the Routing Engine.

## Setting up a Default Carrier and, Optionally, Additional Carriers

**About carriers:** A carrier is required on each order. At a minimum you need to set up a default carrier, specified at the **Preferences** screen.

If the Submit Order message creating a retail pickup, delivery, or ship-to-store order:

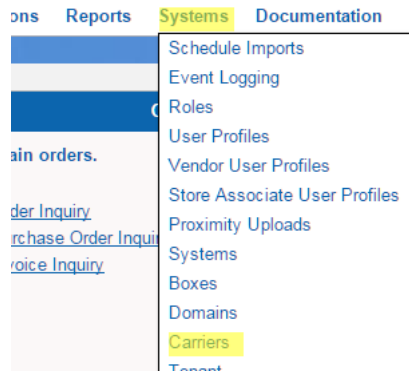
- specifies a *ship\_via* that matches a carrier you have set up through the **Carriers** screen, Oracle Retail Order Broker uses this carrier on the order and resets the carrier as active, if needed.
- specifies a *ship\_via* that does not match a carrier you have set up through the **Carriers** screen, Oracle Retail Order Broker creates the carrier and uses this carrier on the order.
- does not specify a *ship\_via*, Oracle Retail Order Broker uses the default carrier you specify at the **Preferences** screen.

Default carriers for other order types:

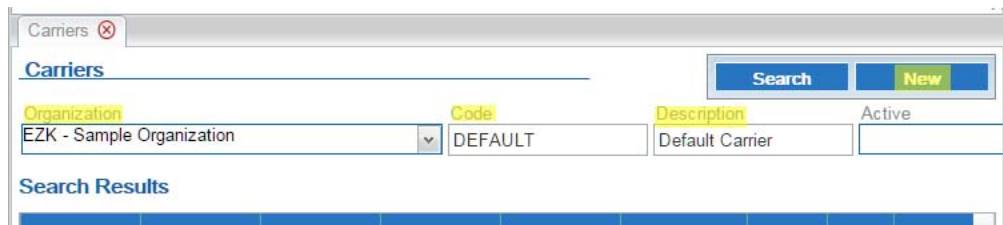
- For a pickup order, Oracle Retail Order Broker uses the default PICKUP carrier, regardless of whether a *ship\_via* is passed in the Submit Order message. The default PICKUP carrier is created automatically through the Submit Order process if the carrier does not already exist.
- For a ship-to-store order, Oracle Retail Order Broker uses the default SHIP2STORE carrier it creates automatically, regardless of whether a *ship\_via* is passed.

The following steps are required to set up the default carrier:

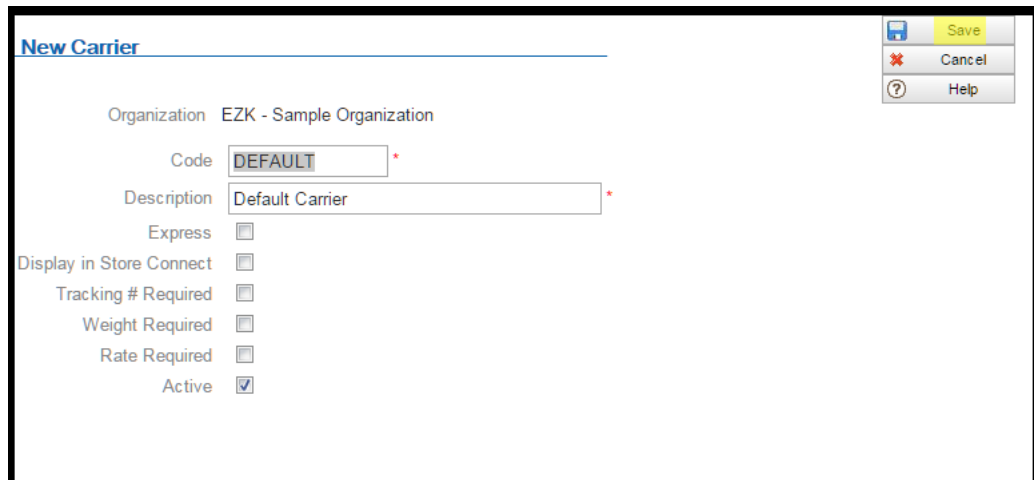
1. Select **Systems > Carriers**.



2. At the **Carriers** screen, select your organization if necessary and, optionally, enter a *Code* and *Description*. If you do not enter them here, you can enter them at the **New Carrier** window. Select **New**.



3. At the **New Carrier** window, complete any additional fields and select **Save**.



**For more information:** See the **Carriers** screen in the Online Help.

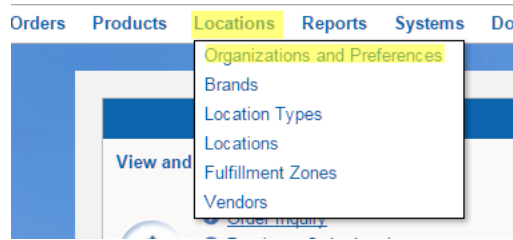
## Setting up Preferences for an Organization


**About preferences:** Use the **Preferences** screen to set rules governing locate item searching and order assignment. You can set preferences at the organization, location type, and location level.

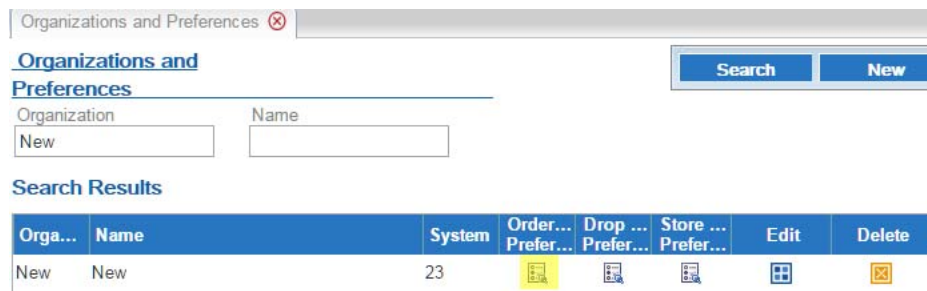
**Saving again after running imports:** After you import locations, products, system products, and product locations, you will need to reopen the **Preferences** screen, make

any desired updates, and select **Save** to have your preferences apply to all locations. See [Scheduling Imports](#) on page 1-17 for more information.

**1. Select [Locations](#) > [Organizations and Preferences](#).**



**2. At the [Organizations and Preferences](#) screen, select the *Order Broker Preferences* icon (  ) for your organization.**



**3. At the [Preferences](#) screen:**

- Specify basic Routing Engine options, including whether to use the Proximity Locator, the default distance to use when searching for a location, and whether to use probability rules and zone fulfillment.
- At the **Order Broker Settings** tab:
  - \* Specify whether to group shipment locations in responses to LocateItems requests for delivery or retail pickup orders, simply indicating whether the requested merchandise is available for shipment rather than listing locations in the LocateItems response.
  - \* Indicate whether to support splitting orders or lines, or process partial status updates for order lines.
  - \* Specify the maximum number of locations to return in a LocateItems response.
  - \* Set up the criteria for the Routing Engine to use when selecting locations, including proximity, on-hand count, location priority, and additional, optional criteria.
  - \* Specify the default unfulfillable location (set up through [Creating the Default Unfulfillable Location](#) on page 1-12). This location needs to have all of the Yes/No options under **Fulfillment** (*Backorder Available, Pickup Available, Delivery Available, and Retail Pickup Available, or Ship For Pickup Sourcing and Ship For Pickup Receiving/Pickup*) set to **No**.

## Setting up Preferences for an Organization

- \* Specify the default carrier (set up through [Setting up a Default Carrier and, Optionally, Additional Carriers](#) on page 1-13).

The screenshot shows the 'Preference Options' dialog box for an organization named 'EZK'. The dialog is divided into two main sections: 'Preference Options' and 'Fulfillment'.

**Preference Options:**

- Use Proximity Locator:  Yes  No
- Default Distance (miles): 4000 \*
- Use Offline Newer Than: 00:30:00 \*
- No Offline Response Action: Use Offline \*
- Use Probability Rules:
- Use Zone Fulfillment:
- Use Maximum Order Limits:
- Exclude Locations with Zero Availability:

**Fulfillment:**

- Group Shipment Locations:
- Allow Split Order:
- Maximum No. Responses: 6 \*
- Proximity: 2 \*
- On Hand Count: 3 \*
- Location Priority: 1 \*
- Last Order Assigned: Not Used \*
- Sales Velocity Rank: Not Used \*
- Default Unfulfillable Location: 888 - Unfulfillable Location \*
- Default Carrier: DFT - Default Carrier \*

Additional settings in the 'Fulfillment' section:

- Allow Split Line:
- Allow Partial Updates:
- Order By: Closest \*
- Order By: High To Low \*
- Order By: Low To High \*
- Order By: [Empty] \*
- Order By: [Empty] \*

- At the **Fulfillment** tab:
  - \* Specify whether a location or location type supports picking, delivery (shipping), retail pickup (transfer), or ship-to-store orders, and whether backorder processing is available.
  - \* Specify the priority to use for order assignment, and the maximum number of orders to assign per day.



- \* At the organization level, you also specify the maximum number of times to reassign (“reshop”) a delivery or retail pickup order if it is rejected by the assigned fulfilling location.

The screenshot shows the 'Organizations and Preferences' window for 'EZK - Sample Organization'. The 'Whs' (EZK warehouse) is selected in the left-hand tree. The 'Preference Options' section is titled 'EZK warehouse' and includes a 'Save' button and a 'Cancel' button. Under 'Use Proximity Locator', the 'Not Defined' radio button is selected. The 'No Offline Response Action' is set to 'Not Defined'. The 'Fulfillment' tab is active, showing the following settings:

- Pickup Available:  Yes  No  Not Defined \*
- Shipping Available:  Yes  No  Not Defined \*
- Transfer Available:  Yes  No  Not Defined \*
- Backorder Available:  Yes  No  Not Defined \*
- Ship To Store Available:  Yes  No  Not Defined \*
- Location Priority:  \*
- Maximum Daily Orders:  is Unlimited  Not Defined

**For more information:** See the **Preferences** screen in the Online Help for complete field descriptions and background.

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**Important:** You need to set all Order Broker preferences at the organization level before integrating any external systems with Oracle Retail Order Broker. See the description of the **Preferences** screen for complete information on setting preferences.

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**Preference overrides:** Optionally, you can set up overrides at the order type and system level for the Routing Engine to use when searching for fulfilling locations. For example, you can have the Routing Engine sort locations for pickup orders by proximity, while it sorts locations for delivery and retail pickup orders by available quantity. Unless you set up overrides, each level “inherits” the settings from the **Preferences** screen. See the **Order Broker Preference Overrides** screen in the Online Help for more information.

## Scheduling Imports

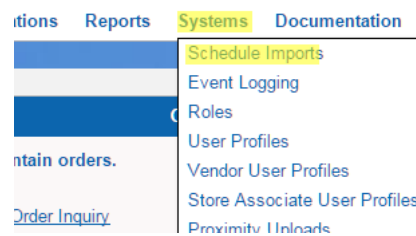
**About imports:** The automated import process enables you to import and update locations, products, system products, product locations, and product barcodes from an integrated system.

**Note:** If you are using the Oracle Maps Cloud Service instead of the proximity upload to support proximity locator searching, you should complete Oracle Maps Cloud Service configuration before importing locations, so that the latitude and longitude of each location can be assigned as it is created. Contact your Oracle representative for information on implementing the Oracle Maps Cloud Service.

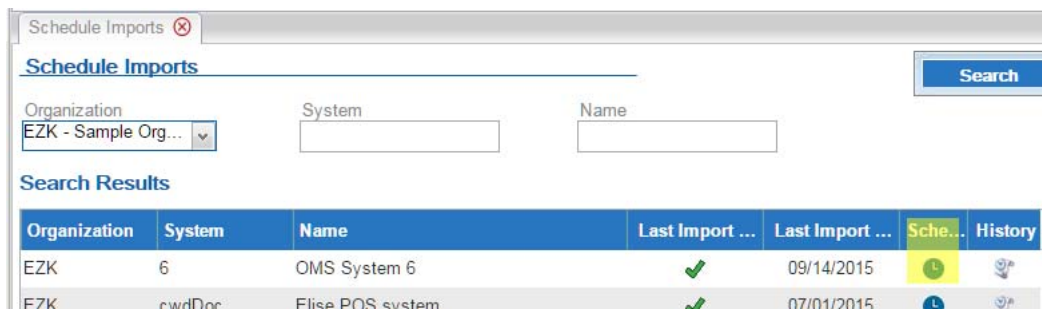
**Import from default system first:** Because you need to create product records in the default system before you can create system product records in any other systems, it is important that you run the import for the default system before the other systems.

**Processing steps:** The import checks the *Product Import Files* folder specified at the **Tenant - Admin** screen for a pipe-delimited file containing each type of information for import (location, product, system product, product location, and product barcode), and uses the records in these files to create or update the related records in the Oracle Retail Order Broker database.

1. Select **System > Schedule Imports**.



2. At the **Schedule Imports** screen, select the schedule icon (🕒) for a system.



3. At the **System Import Schedule** screen:

- Select the *Enabled* flag if it is not already selected.
- To schedule the import, select each day of the week when the import should run, or select *Daily* to run the import every day, and enter the time in HH:MM format when the import should run on selected days.
- To run the import on demand, select the *Run Now* flag.
- Optionally, change the *Days to Keep Errors* setting to any number from 1 to 99.

- Select **Save**.

**Important:** Oracle recommends that you schedule imports daily at a time when demands on the system are limited, and when it does not interfere with the database backup, and that you do not schedule more than one import at a time against the same database.

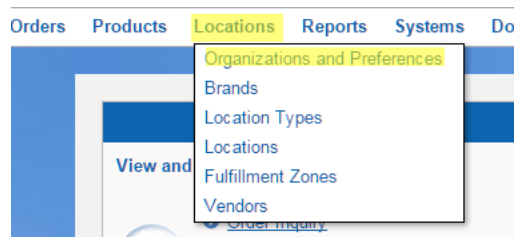
**For more information:** See the **Order Broker Routing Engine Overview** in the Online Help for a process overview, and see **System Import Schedule** in the Online Help for file layouts, file naming conventions, and mapping details.


**Mapping from integrating systems:** Consult the integrating system’s documentation and complete the **System Import Schedule** screen for systems that support the import process, including CWSerenade.

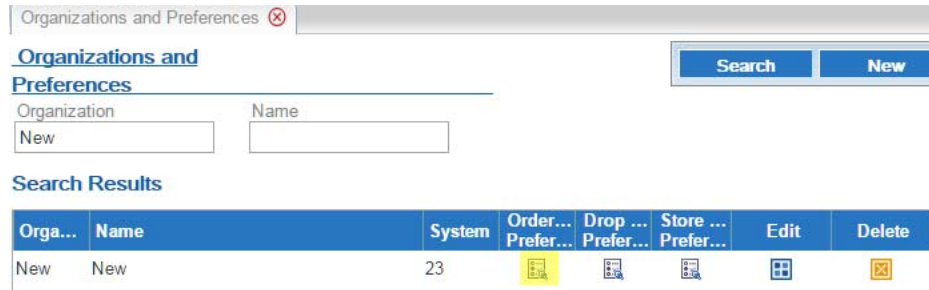
## Adjust and Save Preferences

After importing locations, products, system products, and product locations, you need to return to the **Preferences** screen, make any necessary adjustments, and select **Save** again to apply the preference settings. You also need to save your preference settings after creating a new location to have the settings apply to each new location.

1. Select **Locations > Organizations and Preferences**.



- At the **Organizations and Preferences** screen, select the *Order Broker Preferences* icon (  ) for your organization.



At the **Preferences** screen, make any necessary changes at the organization, location, location type, or location type level, and select **Save**.

## Setting up Web Service Authentication

**About web service authentication:** By setting up and requiring user IDs and passwords for web services, you confirm that Oracle Retail Order Broker authenticates the identify of the system submitting web service messages.

Web service authentication is required. If Oracle Retail Order Broker receives a web service request message without a valid web service user and password, the request is refused with an error: *Inbound Message failed validation*.


The three web services requiring authentication are:

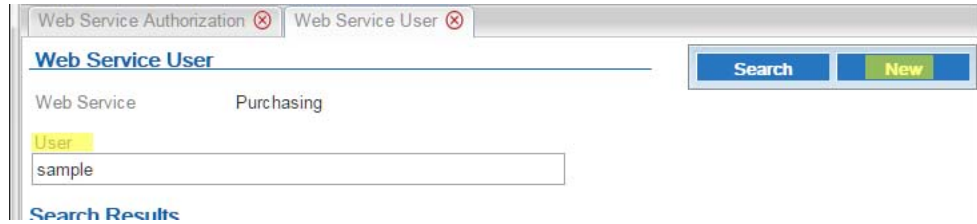
- *Discovery:* Requests include location and system discovery, so an integrating system can obtain a list of locations or systems in Oracle Retail Order Broker.
- *Locate:* Includes all requests related to the Routing Engine.
- *Purchasing:* Includes all requests related to the Supplier Direct Fulfillment module.

To set up users and passwords for web service authentication:

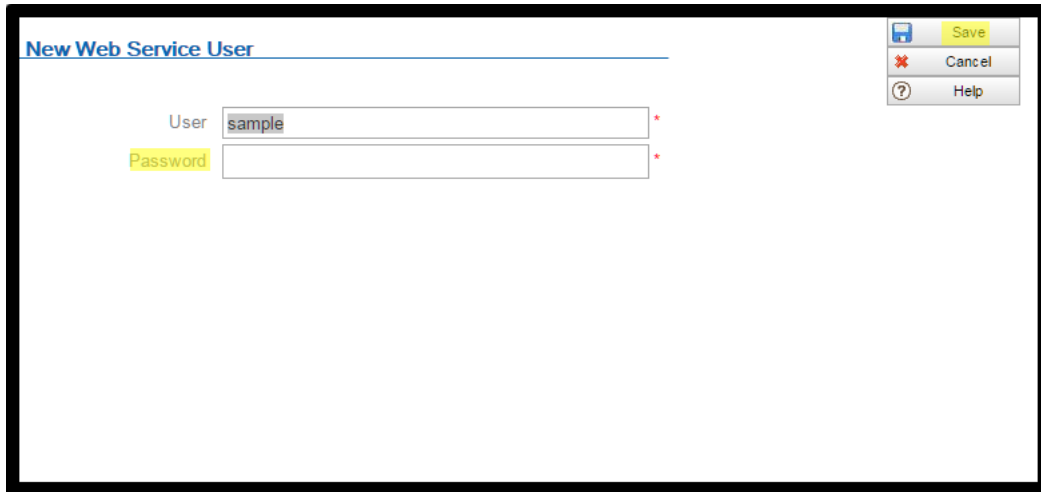
- Select **Systems > Web Service Authorization**.



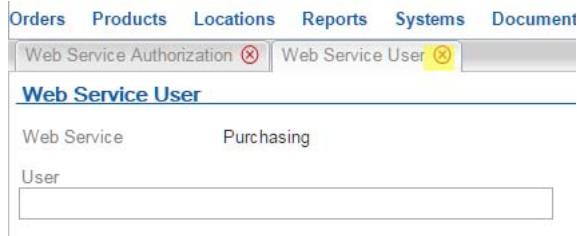
2. At the **Web Service Authorization** screen, select the *Edit* icon (  ) for a web service you will be using.
3. At the **Web Service User** screen, enter a *User* name to use for web service authentication and select **New**.



4. At the **New Web Service User** window, enter the *Password* for the user and select **Save**.



5. Close the **Web Service User** screen when you have finished creating each web service user that an integrating system will use to authenticate web service messages.



**For more information:** See the **Operations Guide** for more information on supported web services.