

Oracle® Retail Order Broker
Administration Guide
Release 19.0

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Contents

Send Us Your Comments	v
Preface	vi
Audience	1-vi
Documentation Accessibility	1-vi
Related Documents	1-vi
Customer Support	1-vi
Improved Process for Oracle Retail Documentation Corrections	1-vii
Oracle Retail Documentation on the Oracle Help Center	1-vii
Conventions	1-vii
1 Setting Up Data	
Before You Start	1-2
Logging in for the First Time	1-2
Configuring Tenant Settings	1-3
Creating an Organization	1-3
Creating the Default System	1-5
Creating Each Additional System that will Integrate with Order Broker	1-7
Optionally, Complete Configuration for LDAP Authentication	1-7
Creating Additional User Profiles	1-8
Selecting the Default Shipping System for the Admin User	1-12
Uploading Proximity Data	1-12
Creating Location Types	1-14
Setting up a Default Carrier and, Optionally, Additional Carriers	1-14
Creating the Default Unfulfillable Location	1-16
Setting Up Preferences for an Organization	1-16
Scheduling Jobs	1-20
About Scheduling Imports	1-21
Restart All	1-21
Adjust and Save Preferences	1-22
Setting up Web Service Authentication	1-23

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Oracle Retail Order Broker Administration Guide, Release 19.0

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- Did you understand the context of the procedures?
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Preface

The 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

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/index.html>.

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Related Documents

For more information, see the following documents in the Order Broker Release 19.0 documentation set:

- *Order Broker Release Notes*
- *Order Broker Operations Guide*
- *Order Broker Online Help*
- *Order Broker Vendor Portal Online Help*
- *Oracle Retail Order Broker Cloud Service Store Connect Online Help*

See the Order Broker 19.0 documentation library at the following URL:

<https://www.oracle.com/documentation/retail.html>

Customer Support

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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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Oracle Retail Documentation on the Oracle Help Center

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:

Convention	Meaning
boldface	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.

Setting Up Data

Purpose: Follow the steps below to set up data for the Routing Module as part of 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
- Setting up event logging

In this chapter:

- [Before You Start](#) on page 1-2
- [Logging in for the First Time](#) on page 1-2
- [Configuring Tenant Settings](#) on page 1-3
- [Creating an Organization](#) on page 1-3
- [Creating the Default System](#) on page 1-5
- [Creating Each Additional System that will Integrate with Order Broker](#) on page 1-7
- [Optionally, Complete Configuration for LDAP Authentication](#) on page 1-7
- [Creating Additional User Profiles](#) on page 1-8
- [Selecting the Default Shipping System for the Admin User](#) on page 1-12
- [Uploading Proximity Data](#) on page 1-12
- [Creating Location Types](#) on page 1-14
- [Setting up a Default Carrier and, Optionally, Additional Carriers](#) on page 1-14
- [Creating the Default Unfulfillable Location](#) on page 1-16

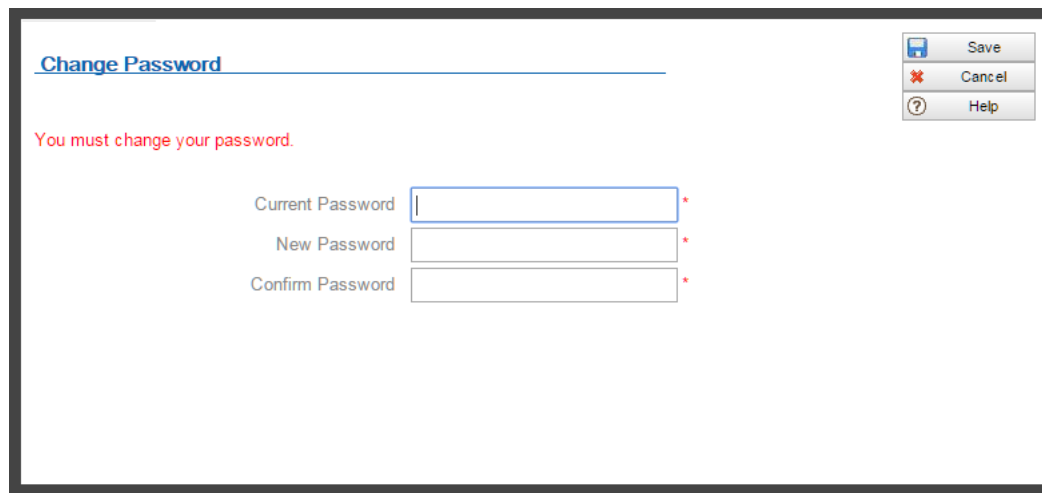
- [Setting Up Preferences for an Organization](#) on page 1-16
- [Scheduling Jobs](#) on page 1-20
- [Setting up Web Service Authentication](#) on page 1-23

Before You Start

Before you begin configuration of Order Broker, you need to complete the steps described in the 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 Order Broker, including:

- the Order Broker module(s) used
- 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 retention settings for the daily cleanup job
- 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)
- paths for folders used for uploads, import, and export, if you are not using the file storage API
- 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

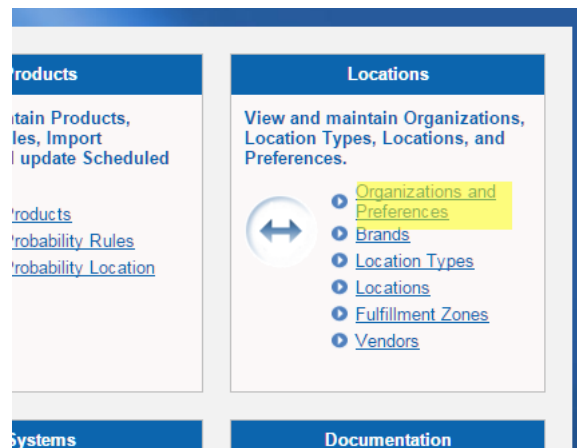
For more information: See the **Tenant - Admin** screen in the Online Help for a description of the fields at this screen.

Creating an Organization

About organizations: The organization is the second level in the 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
example	Sample Organization

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 reports, forms, and system-generated emails.

New Organization

Organization Example

Name Save Cancel

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	United States-English	*
Date Format	MM/DD/YYYY	*
Time Format	AM/PM	*
Decimal Separator	Period	*
Thousands Separator	Comma	*

- * Click **Save**.

Creating the Default System

About systems: Each system in Order Broker represents an application, such as Oracle Retail Order Management System Cloud Service, CWDirect, or Xstore, that shares inventory information via 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.

Note: If you integrate with Oracle Retail Order Management System 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.

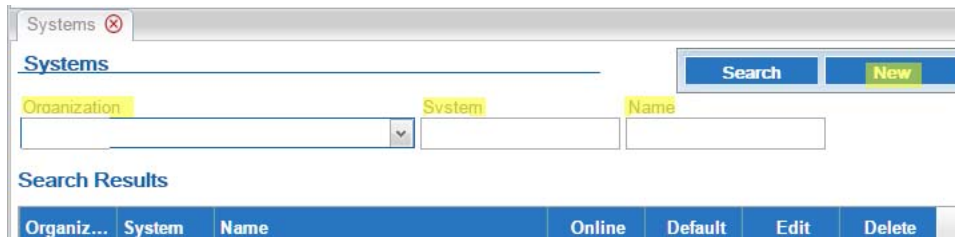
Note: The system flagged as the Vendor Default should not be the default system for the organization.

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.



- 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.

System

Organization: New - New updated *

System: sample *

Name: *

Organization Default

Vendor Default

Store Connect Default

Inventory | Orders | Reservation | RICS Integration | OCDS Integration Import

Online

Probable Qty Export

Track Fulfilled Qty: Do Not Track Fulfilled

Connection Type: None

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 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.

Optionally, Complete Configuration for LDAP Authentication

Optionally, you can use LDAP authentication in Order Broker to enable a user to enter his or her standard network password to log in, rather than a separate password that is specific to Order Broker.

LDAP authentication is not available for vendor users.

Use the steps below to set up Order Broker to specify the domain and LDAP connection string to support LDAP authentication:

1. Select System > Domains to advance to the Domains screen.

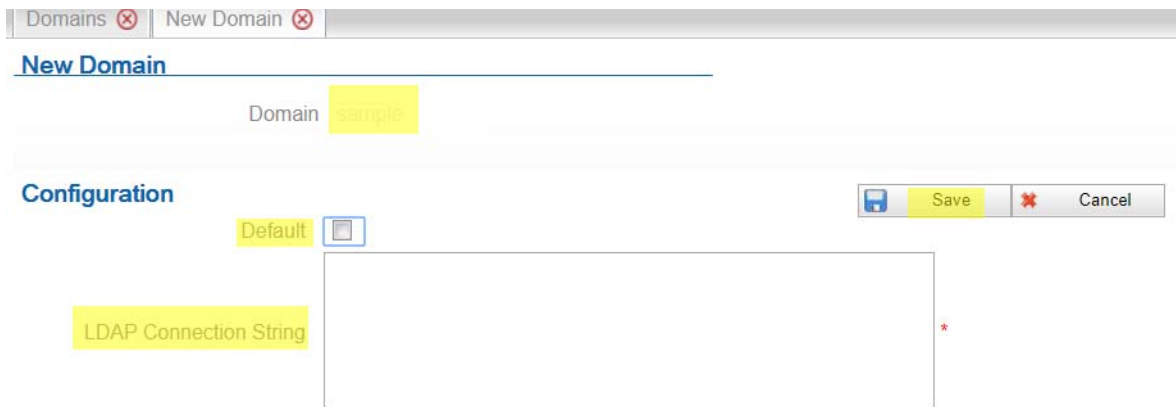


2. At the **Domains** screen, enter the name of the domain in the *Domain* field and click **New**.



The name can be made up of alphanumeric or special characters, and there is no specific limit on its length; however, it must match the network domain name.

3. At the **New Domain** screen:
 - Optionally, flag the domain as the *Default* so it will default at the **User Profile Configuration** screen. If another domain was previously flagged as the default, that domain's *Default* flag is cleared and the new domain becomes the default.
 - Enter the *LDAP connection string* for Order Broker to use to verify the user at login. Your information technology staff can provide you with this information. Do not enclose the string in quotation marks.
 - Click **Save**.



Warning: The screen displays a warning message if the domain does not use secure LDAP (LDAPS).

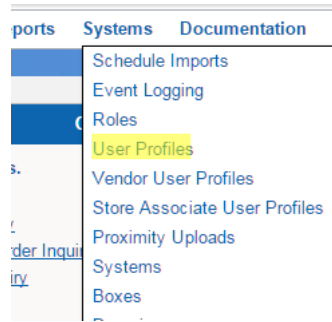
Note: The **Reset Password** option at the **User Profiles** screen is not available for users configured for LDAP authentication; however, you can still use the **Disable Login** option for these users.

Creating Additional User Profiles

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

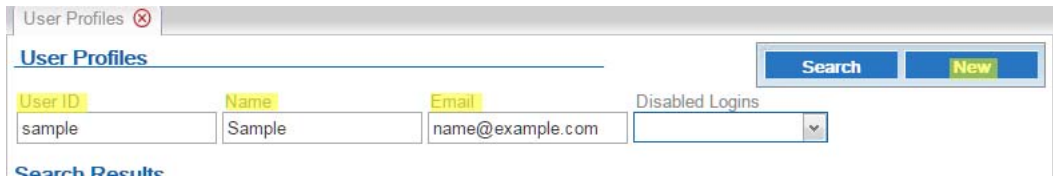
Delivered roles: Order Broker is delivered with predefined roles. Make sure to review the authority associated with these roles prior to assigning them to a user.

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 you are using LDAP:
 - * Select the *Use LDAP* flag.
 - * If you have flagged a domain as the default, this domain defaults to the user's *Domain* field; however, you can override the default.
 - * If the user's LDAP user ID differs from his or her Order Broker user ID, complete the *LDAP User Id* field; otherwise, leave this field blank.

- Enter and confirm the initial, temporary password for the user to use when first logging into Order Broker.

User Profile Configuration

Preferences Authority Save

User

User ID *

Name *

Email

Active

Use LDAP

Password *

Confirm Password *

Preferences

Default Shipping System *

Data Formats

Date Format MM/DD/YYYY *

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

- 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.

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

User Profile Configuration

The screenshot shows a 'User Profile Configuration' dialog box with two tabs: 'Preferences' (selected) and 'Authority'. At the top right are 'Save' and 'Cancel' buttons. The 'User' section includes:

- User ID: sample
- Name: sample
- Email: (empty)
- Active:
- Password: (empty)
- Confirm Password: (empty)

The 'Preferences' section includes:

- Default Shipping System: (dropdown menu)

The 'Data Formats' section includes:

- Date Format: MM/DD/YYYY

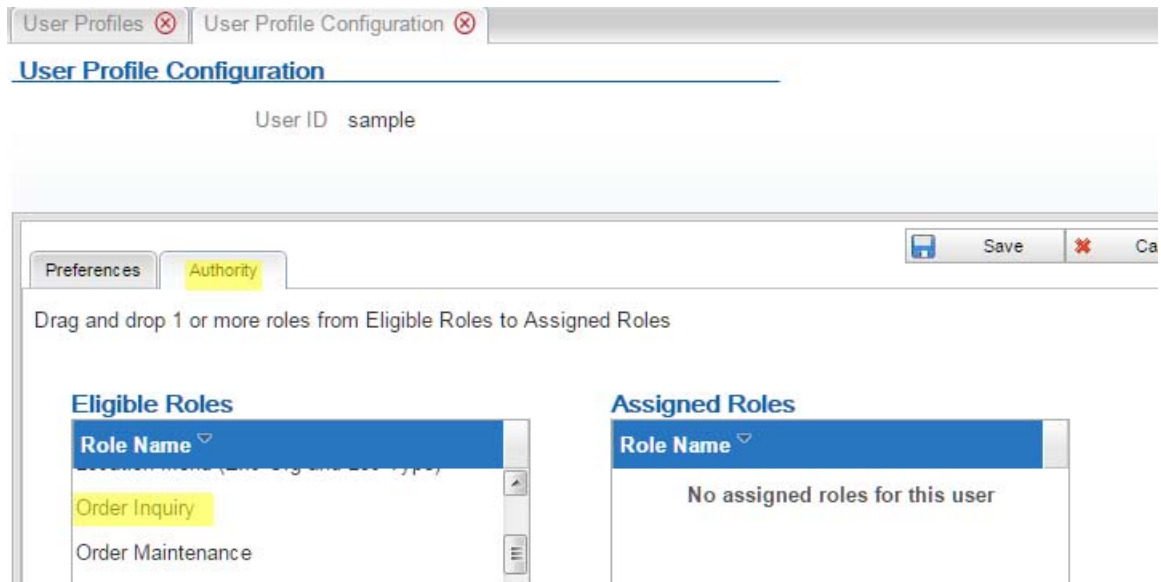
- if necessary, change the **Data Formats** settings for the user to change the display of dates, times, and numbers on Order Broker screens from their default settings.

This close-up shows the 'Data Formats' section with the following settings:

- Date Format: MM/DD/YYYY
- Time Format: AM/PM
- Decimal Separator: Period
- Thousands Separator: Comma

Selecting the Default Shipping System for the Admin User

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



- 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:* 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.

Selecting the Default Shipping System for the Admin User

Use the steps described above under [Creating Additional User Profiles](#) on page 1-8 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.

Note: The *Default Shipping System* is not a required field at the User Profile screen if you have not yet created any systems in Order Broker.

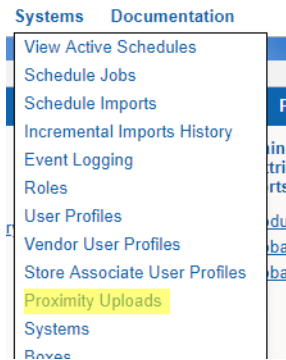
Uploading Proximity Data

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.

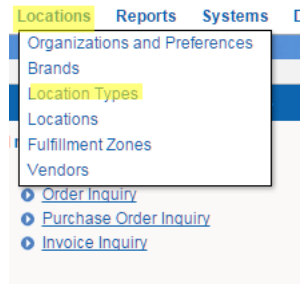
For more information: See the **Proximity Uploads** screen in the Online Help for more information, including the file layout and troubleshooting. Also, see the **Order Broker Routing Engine Overview** in the Online Help for a discussion of proximity locator searching and preferences.

Creating Location Types

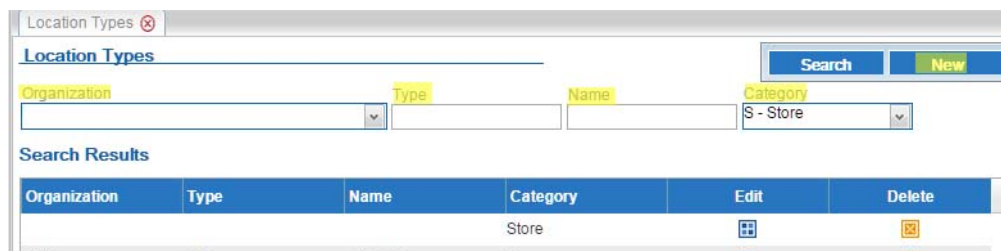
About location types: Location types identify a group of locations based on the system to which they belong, such as your order management system or your POS system, as well as their function, such as distribution center or retail store.

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**. The location type is created.

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, 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, Order Broker creates the carrier and uses this carrier on the order.
- does not specify a *ship_via*, Order Broker uses the default carrier you specify at the **Preferences** screen.

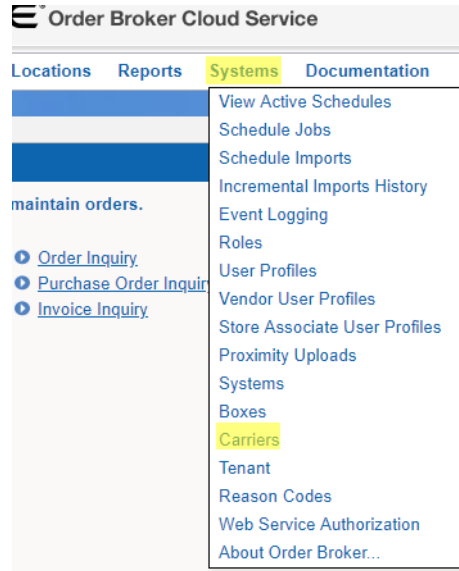
Setting up a Default Carrier and, Optionally, Additional Carriers

Default carriers for other order types:

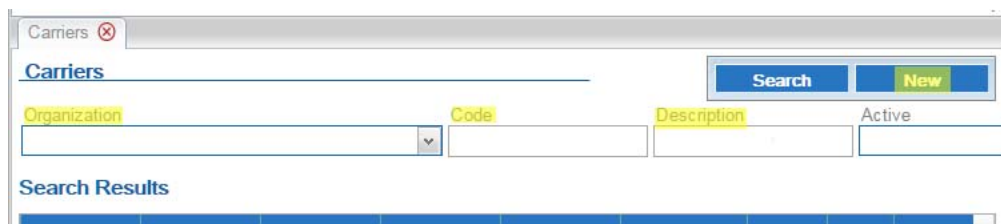
- For a pickup order, Order Broker uses the default PICKUP carrier, regardless of whether a `ship_via` is passed in the Submit Order message. The default PICKUP carrier is created automatically through the Submit Order process if the carrier does not already exist.
- For a ship-to-store order, Order 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:

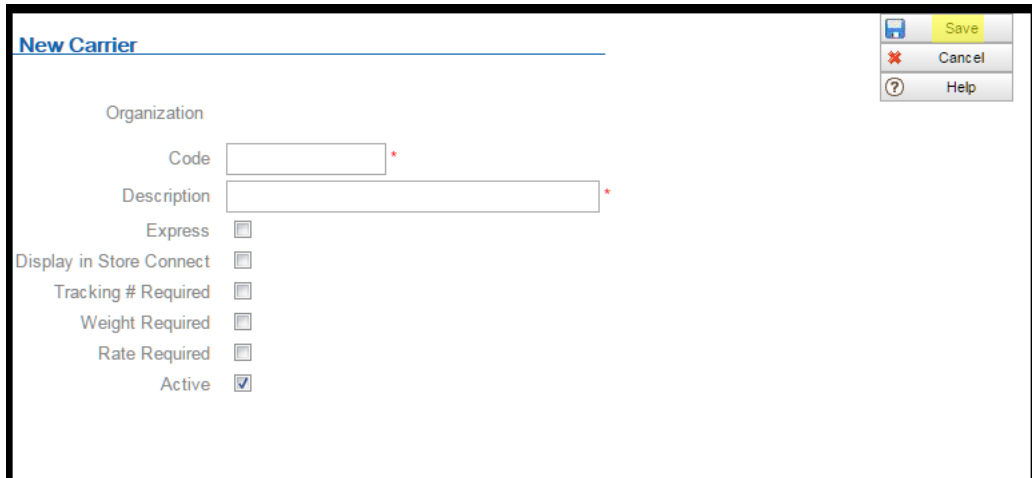
1. Select **Systems > Carriers**.



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.

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 1-16 for information on identifying the default unfulfillable location for the Routing Engine.

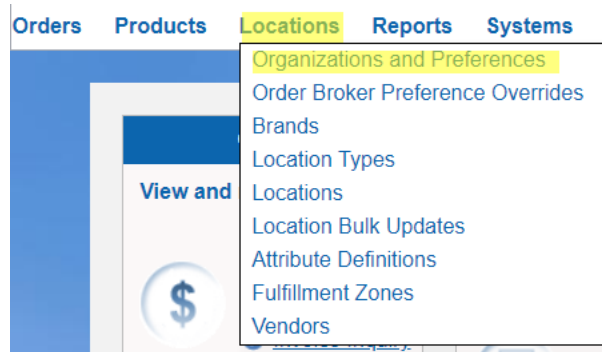
Setting Up Preferences for an Organization


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.

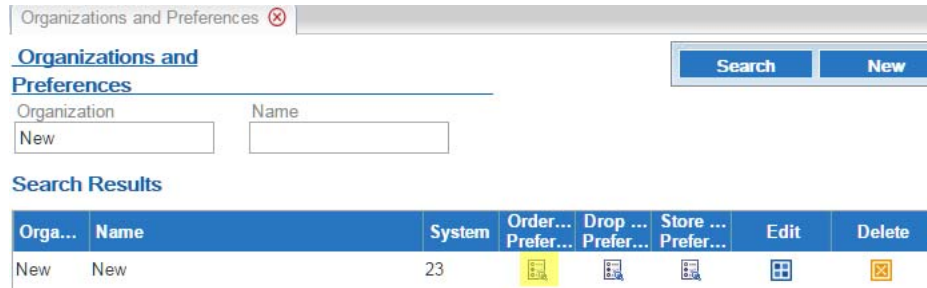
Saving again after running imports: After you import locations, products, system products, and product locations, you will need to reopen the **Preferences** screen, make

any desired updates, and select **Save** to have your preferences apply to all locations. See [About Scheduling Imports](#) on page 1-21 for more information.

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

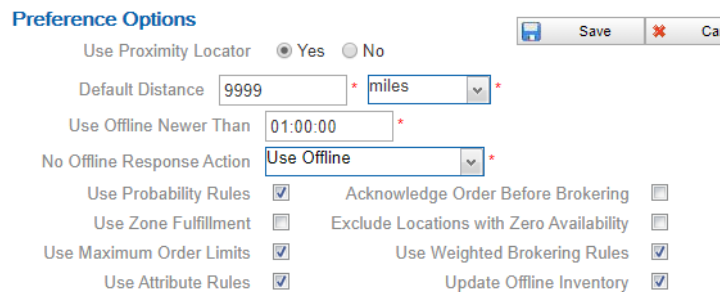


2. At the **Organizations and Preferences** screen, select the *Order Broker Preferences* icon () for your organization.



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.

Setting Up Preferences for an Organization

- * 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 1-16). 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**.
- * Specify the default carrier (set up through [Setting up a Default Carrier and, Optionally, Additional Carriers](#) on page 1-14).

The screenshot shows the 'Preference Options' configuration page. The left sidebar contains a tree view with 'store' and 'warehouse' folders. The main content area is titled 'Preference Options' and contains various settings. The 'Fulfillment' tab is selected, showing options like 'Use Probability Rules', 'Use Zone Fulfillment', 'Use Maximum Order Limits', and 'Use Attribute Rules'. Below these are tabs for 'Order Broker Settings', 'Fulfillment', 'Standard Brokering', and 'Weighted Brokering'. The 'Fulfillment' tab is active, displaying settings such as 'Group Shipment Locations', 'Allow Split Order', 'Maximum No. Responses' (set to 9), 'Default Unfulfillable Location' (set to 'DEFAULT - Default Unfulfillab...'), and 'Default Carrier' (set to 'DEFAULT - Default Carrier'). A 'Save' button is visible in the top right corner.

- At the **Fulfillment** tab:

- * Specify the fulfillment types supported. Note that the options here differ based on whether ship-for-pickup orders are supported.
- * Specify the priority to use for order assignment, and the maximum number of orders to assign per day.
- * At the organization level, specify the maximum number of times to reassign (“reshop”) an order if it is rejected by the assigned fulfilling or sourcing location.
- * If your organization supports ship-for-pickup orders, specify the sourcing distance for the Routing Engine to use when shopping for sourcing locations.

Setting Up Preferences for an Organization

- * Also at the **Fulfillment** tab, complete the settings related to automatically canceling unclaimed pickup or ship-for-pickup orders.

Organizations and Preferences Preferences

Preferences

Organization

- store
- warehouse

Preference Options

Save Cancel

Use Proximity Locator Yes No

Default Distance * miles *

Use Offline Newer Than *

No Offline Response Action *

Use Probability Rules Acknowledge Order Before Brokering

Use Zone Fulfillment Exclude Locations with Zero Availability

Use Maximum Order Limits Use Weighted Brokering Rules

Use Attribute Rules Update Offline Inventory

Order Broker Settings
Fulfillment
Standard Brokering
Weighted Brokering

Pickup Available Yes No *

Delivery Available Yes No *

Ship For Pickup Sourcing Available Yes No *

Ship For Pickup Receiving/Pickup Available Yes No *

Backorder Available Yes No *

Location Priority *

Search Retries *

Maximum Daily Orders * 0 is Unlimited

Sourcing Distance * miles *

Auto Cancel Days of Unclaimed Pickup Orders *

Auto Cancel Days of Unclaimed Ship For Pickup Orders *

Auto Cancel Reason *

- At the **Standard Brokering** tab, complete the fields that control brokering orders if you do not use Weighted Brokering.

Order Broker Settings

Fulfillment

Standard Brokering

Weighted Brokering

Proximity	<input type="text" value="3"/>	Order By	<input type="text" value="Closest"/>
On Hand Count	<input type="text" value="1"/>	Order By	<input type="text" value="High To Low"/>
Location Priority	<input type="text" value="2"/>	Order By	<input type="text" value="Low To High"/>
Last Order Assigned	<input type="text" value="Not Used"/>	Order By	<input type="text" value=""/>
Sales Velocity Rank	<input type="text" value="Not Used"/>	Order By	<input type="text" value=""/>

- At the **Weighted Brokering** tab, complete the fields that control brokering orders if you do use Weighted Brokering.

Order Broker Settings | Fulfillment | Standard Brokering | **Weighted Brokering**

Maximum Order Splits * 0 is Unlimited

Weighted Percentages

Labor Cost *

Gross Margin *

Proximity *

On Hand Count *

Sales Velocity * Priority *

Total Weights 100

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

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

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 Jobs

Use the **Schedule Jobs** screen to create schedules for jobs:

- Data Hygiene:
 - Completed Order Private Data Purge
 - Daily Clean Up
- Exports:
 - Fulfilled Inventory Export
 - Probable Quantity Export
 - Sales Order Data Extract
- Imports:
 - Identity Cloud User Synchronization
 - Product Import
- Orders:
 - Auto Cancel Unclaimed Pickup Orders
 - Email Notifications

See the **Schedule Jobs** screen in the online help for more information.

Note: Do not attempt to schedule jobs before creating systems.

About 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: Unless you are importing products from Merchandising Cloud Services applications (RMFCS), you need to create product records in the default system before you can create system product records in any other systems, so in that case you need to run the import for the default system before the other systems.

Processing steps: If you use the File Storage API, the import checks the OROB-IMPORTS container in the FILE_STORAGE table for a pipe-delimited file containing each type of information for import (location, product, system product, product location, and product bar code). Otherwise, if you use secure FTP, the import checks the *Product Import Files* folder specified at the **Tenant - Admin** screen for the pipe-delimited files. See *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* in the online help for background on the import process.

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.

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

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

Restart All

Use the **Reschedule All** option at the **View Active Schedules** screen to start all scheduled jobs and programs listed above. as well as:

- scheduled report generation
- polling of orders for Store Connect.

View Active Schedules ✕

View Active Schedules

Job Name: Email Notifications Organization:

Search **Reschedule All**

Search Results

Job Name	Organization	Last Updated	Last Run	Next Run	History
Email Notifications		01/18/2019 03:57	08/09/2019 14:00	08/09/2019 14:01	


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**.

Orders Products **Locations** Reports Systems

- Organizations and Preferences**
- Order Broker Preference Overrides
- Brands
- Location Types
- Locations
- Location Bulk Updates
- Attribute Definitions
- Fulfillment Zones
- Vendors

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






Organizations and Preferences ✕

Organizations and Preferences

Organization: Name:

Search New

Search Results

Orga...	Name	System	Order... Prefer...	Drop ... Prefer...	Store ... Prefer...	Edit	Delete
New	New	23					

At the **Preferences** screen, make any necessary changes at the organization, 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 Order Broker authenticates the identify of the system submitting web service messages.

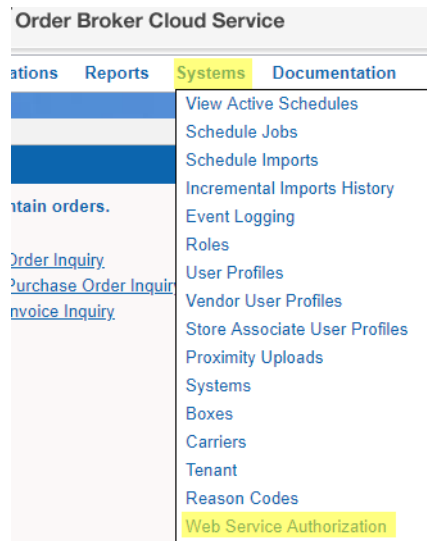
Web service authentication is required. If Order Broker receives a web service request message without a valid web service user and password, the request is refused with an error: `Inbound Message failed validation`.


The web services requiring authentication are:

- *Admin:* Requests include product update, location update, and location detail.
- *Discovery:* Requests include location and system discovery, so an integrating system can obtain a list of locations or systems in Order Broker.
- *Locate:* Includes all requests related to the Routing Engine.
- *Private Data Request:* Requests include GetPrivateData and ForgetPrivateData.
- *Purchasing:* Includes all requests related to the Supplier Direct Fulfillment module.
- *Storage:* Includes all requests to the file storage API.
- *Vendor:* Includes requests submitted by an integrated vendor using the Supplier Direct Fulfillment module.

To set up users and passwords for web service authentication:

1. 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**.

The screenshot shows a window titled 'Web Service User' with a search bar and a 'New' button. Below the search bar is a table with the following content:

Web Service	Purchasing
User	sample

Below the table is a 'Search Results' label.

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

The screenshot shows a window titled 'New Web Service User' with a form containing two fields: 'User' (containing 'sample') and 'Password'. A 'Save' button is visible in the top right corner.

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.

The screenshot shows a window titled 'Web Service User' with a search bar and a 'New' button. Below the search bar is a table with the following content:

Web Service	Purchasing
User	sample

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