

**Oracle® Retail Order Broker Cloud
Service**

Administration Guide

Release 18.0

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Oracle Retail Order Broker Cloud Service Administration Guide, Release 18.0

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Preface

The Order Broker Cloud Service 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.

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Related Documents

For more information, see the following documents in the Order Broker Cloud Service Release 18.0 documentation set:

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

See the Order Broker Cloud Service 18.0 documentation library at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.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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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 Cloud Service 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

Note: For a cloud implementation, Oracle staff need to make sure that any external URLs are added to the proxy server's white list.

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Before You Start

Before you begin configuration of Order Broker Cloud Service, you need:

- **URL:** The URL to use when logging into Order Broker.
- **Default user profile:** A default admin user profile for you to use when completing configuration in Order Broker, including creating additional users, configuring systems, setting preferences, and importing data.

Contact your Oracle representative for the user ID of the default admin user. This user needs to exist in both Order Broker and Oracle Identity Cloud Service (IDCS).

You will need to assign the *Default Shipping System* to the user profile once you have completed these configuration steps below.

Background on IDCS Setup

Typically, before you begin setting up data in Order Broker for a new installation or an upgrade to release 18.0 or higher:

- You need a default admin user. Contact your Oracle representative for more information.
- The Use IDCS flag at the Tenant - Admin screen needs to be selected, enabling authentication through IDCS and discontinuing authentication through Order Broker if it was previously enabled.
- New install: You need to create all users in IDCS to map to all users in Order Broker, including Order Broker users, Store Connect users, vendor users, and web service users.
- Upgrade to release 18.0: You need to create all users in IDCS before users can begin using Order Broker, including Order Broker users, Store Connect users, vendor users, and web service users. Users can use the Can't sign in? link at the login page to set their passwords.

Note: IDCS is used for user authentication only. All role-based authority to screens and screen options is set up in Order Broker. See the Role Wizard for more information.

User setup, mapping, and authentication with IDCS:

- Authentication for all users, including Web Service Authentication users, takes place using the password defined for the user in Oracle Identity Cloud Service (IDCS).
- All users must be set up both in IDCS (for password authentication only) and in Order Broker. Role assignments in Order Broker control screen and feature

authority at Order Broker, Store Connect, and Vendor Portal screens. See the Role Wizard for more information. No role authority is required for web service users.

- Since Order Broker requires a lower case user ID, you should create lower case user IDs in IDCS for validation into Order Broker.
- The user ID in IDCS for an Order Broker user or Store Connect user must match either the user ID set up in Order Broker, or the Cloud Service User ID defined for the user.
- When the user logs into Order Broker or Store Connect, the user ID entered at the login screen must match the user ID in IDCS. If the user ID in IDCS is the Cloud Service User ID, then the user enters the Cloud Service User ID at the login screen.
- The user ID in IDCS for a vendor or web service user must match the user ID set up in Order Broker. There is no option to cross-reference these user records with a cloud service user ID.
- User ID matching is case-sensitive, whether through the Order Broker user ID or the Cloud Service User ID, is case-sensitive.
- Order Broker, Store Connect, and vendor users can use the *Can't sign in?* link at the login page to reset their passwords.

Can't create duplicate users of the same user type: Order Broker does not allow you to create more than one user of the same type that user either the same Order Broker user ID or the same Cloud Service User ID. For example, if you create an Order Broker user of bfranklin with a Cloud Service User ID of ben.franklin@example.com, you cannot create another Order Broker user with either the same user ID or the same Cloud Service User ID.

However, you can create a duplicate user for each different user type. For example, in addition to the branklin user for Order Broker, you can also create a branklin Vendor Portal user or web service user, or both. You could also create a Store Connect user with a user ID of branklin, or with a Cloud Service User ID of ben.franklin@example.com.

Multiple omni-channel systems: It is possible to use the same IDCS user records for multiple omni-channel systems. You can use the Cloud Service User ID as a cross-reference to Order Broker users and Store Connect users, but this option is not available for Vendor Portal users or web service users. You can also use the same user ID for any user type, except that Order Broker requires a lowercase user ID, as noted above.

Although Order Management System uses uppercase user ID, user validation is not case-sensitive, so a lowercase user ID from IDCS passes validation.

Authentication for outbound web service requests: You can use IDCS to set up users for the authentication of web service requests across omni-channel systems, such as Order Management System Cloud Service or Customer Engagement Cloud Services if the omni-channel systems use the same instance of IDCS.

For more information: See the online help topics on setting up each type of user.

Logging in for the First Time

Set password: The first time you log in using the default admin user profile, you are prompted to change the password.

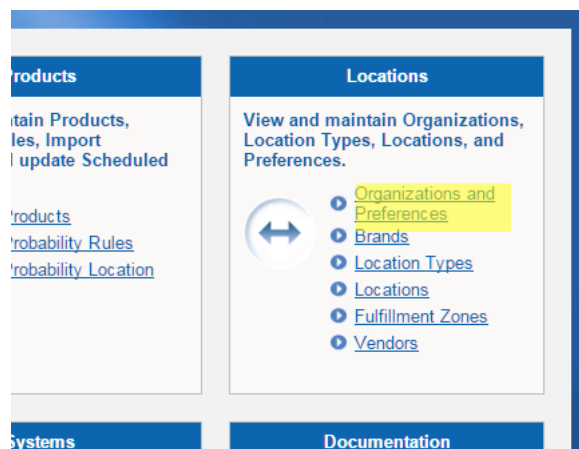
Use IDCS: The *Use IDCS* flag at the Tenant-Admin screen needs to be selected. To display this screen, select **Systems > Tenant** while logged in as the default admin user. If the flag is not already selected, select it now.

Creating an Organization

About organizations: The organization is the second level in the Order Broker Cloud Service 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

Search

- 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

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	<input type="text" value="United States-English"/>	*
Date Format	<input type="text" value="MM/DD/YYYY"/>	*
Time Format	<input type="text" value="AM/PM"/>	*
Decimal Separator	<input type="text" value="Period"/>	*
Thousands Separator	<input type="text" value="Comma"/>	*

- * Click **Save**.

Creating the Default System

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

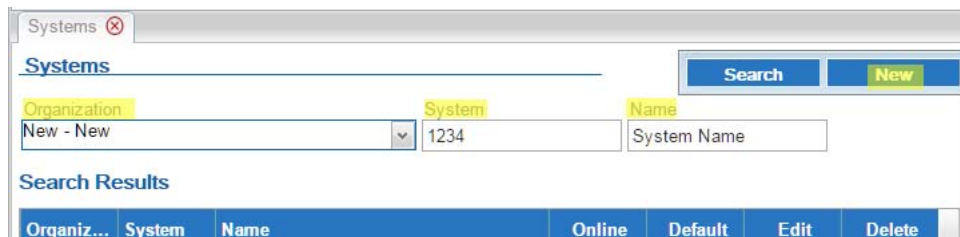
Note: If you integrate with Oracle Retail Order Management System Cloud Service or with CWDirect, the system code should be the same as the company number, without padding zeros. For example, 6 rather than 006. Also, the code for the system must match the setting of the *Locate System (K50)* system control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

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;

Creating Each Additional System that will Integrate with Order Broker Cloud Service

- * Otherwise, you advance to the **System** screen, where you can complete the creation of the system.

The screenshot shows the 'System' configuration screen. The 'Organization' dropdown is set to 'EZK - Sample Organization'. The 'System' text field contains 'sample', and the 'Name' text field contains 'sample system'. There are checkboxes for 'Organization Default' (checked), 'Vendor Default', and 'Store Connect Default'. Below these are tabs for 'Inventory', 'Fulfillment', 'Reservation', 'Probable Qty Export', 'Incremental Inv Import', and 'Fulfilled Inv Export'. Under the 'Fulfillment' tab, there are checkboxes for 'Online' and 'Probable Qty Export', a dropdown for 'Track Fulfilled Qty' set to 'Do Not Track Fulfilled', and a dropdown for 'Connection Type' set to 'None'. At the top right, there are 'Save' and 'Cancel' buttons.

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 Cloud Service

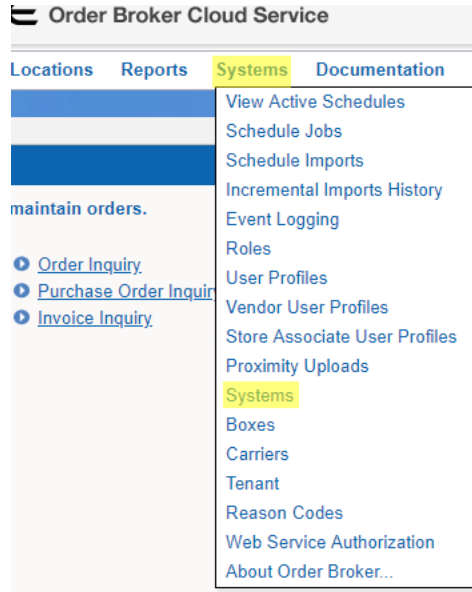
Follow the steps below to create:

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

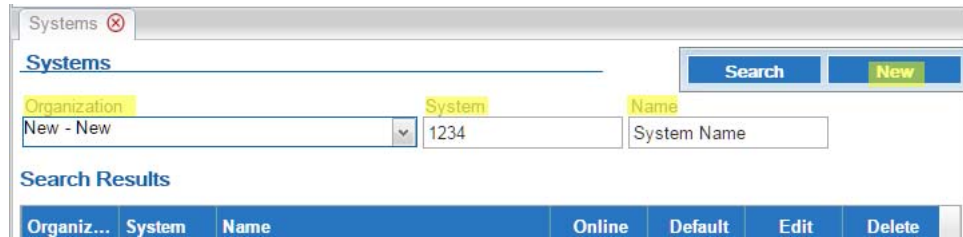
Note: The system flagged as the Vendor Default should not be the default system for the organization.

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

1. Select **Systems** > **System**.



2. At the **System** screen, select your organization from the *Organization* drop-down box.



3. 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 within the organization.
4. 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.
5. Select **New**:
 - if the system already exists in the organization, or if you did not select an organization or enter a system code, Order Broker Cloud Service displays an error message;

6. otherwise, you advance to the **System** screen, where you can complete the creation of the system.

7. Select **Save**.

Note: If you select **Cancel** at the **System** screen without first selecting **Save**, the system is not created.

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

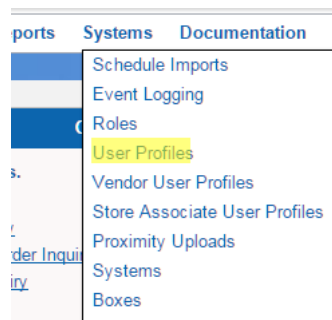
Creating Additional User Profiles

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

IDCS: You also need to create each user in IDCS. Each user will be prompted to set the password for Order Broker Cloud Service the first time they attempt to log in.

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 position positions.

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

User ID	Name	Email	Disabled Logins
sample	Sample	name@example.com	▼

3. You advance to the **User Profile Configuration** screen, open to the **Preferences** tab. If the user ID defined in IDCS is different from the user ID in Order Broker Cloud Service, use the *Cloud Service User Id* field to enter the user ID in IDCS.

Also at the **Preferences** tab, select the *Default Shipping System* to control the system product code to display when the user reviews an order, and change the **Data Formats**, if necessary, 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..

User Profile Configuration

Preferences Authority

User

User ID: example *

Name: example *

Email:

Active:

Cloud Service User Id: example_IDCS

Preferences

Default Shipping System: 30 - OMS System *

Data Formats

Date Format: MM/DD/YYYY *

Time Format: AM/PM *

Decimal Separator: Period *

Thousands Separator: Comma *

4. Use the **Authority** tab to select one or more roles to provide the user with required authority.

The screenshot shows the 'User Profile Configuration' window for a user with ID 'sample'. The 'Authority' tab is selected, and the instruction 'Drag and drop 1 or more roles from Eligible Roles to Assigned Roles' is displayed. The 'Eligible Roles' list contains 'Order Inquiry' and 'Order Maintenance'. The 'Assigned Roles' list is currently empty, showing 'No assigned roles for this user'. Buttons for 'Save' and 'Cancel' are visible in the top right corner.

5. 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. Any store associate or vendor user profiles also need to be created in IDCS.
- *Create additional roles:* Order Broker Cloud Service 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.

Assigning the Default Shipping System to the Admin User Profile

Follow the steps above under [Creating Additional User Profiles](#) on page 1-9 to assign the *Default Shipping System* to the Admin user profile. The *Default Shipping System* assigned to a user indicates the system product code to display on Order Broker screens.

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.

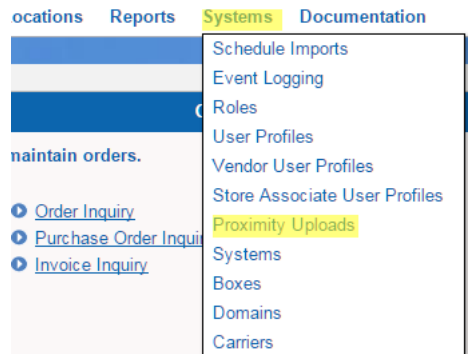
Uploading Proximity Data

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.

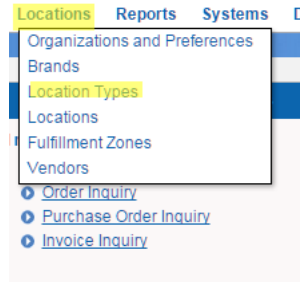
For more information: See the **Proximity Uploads** screen in the Online Help for more information, including the file layout and troubleshooting. Also, see the **Order Broker Routing Engine Overview** in the Online Help or the Operations Guide for a discussion of proximity locator searching and preferences,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

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.

The screenshot shows the 'Location Types' application interface. At the top, there are 'Search' and 'New' buttons. Below them are input fields for 'Organization' (EZK - Sample Organization), 'Type' (example), 'Name' (Example), and 'Category' (S - Store). Below the search fields is a 'Search Results' table with the following data:

Organization	Type	Name	Category	Edit	Delete
EZK	POS	EZK POS	Store	[Edit Icon]	[Delete Icon]
EZK	STC	EZK STC	Store	[Edit Icon]	[Delete Icon]
EZK	Whs	EZK warehouse	Warehouse	[Edit Icon]	[Delete Icon]

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 Cloud Service uses this carrier on the order and resets the carrier as active, if needed.

Setting up a Default Carrier and, Optionally, Additional Carriers

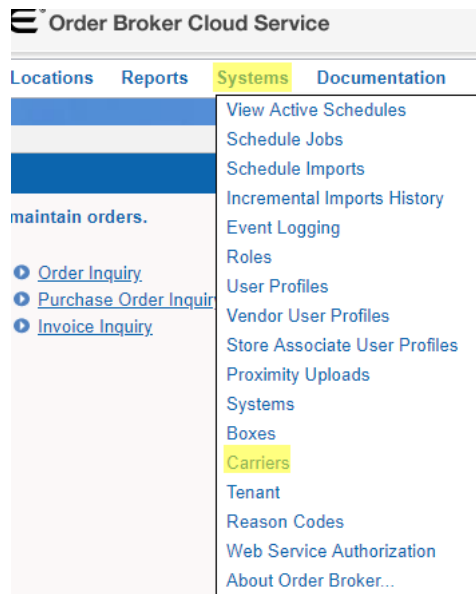
- specifies a `ship_via` that does not match a carrier you have set up through the Carriers screen, Order Broker Cloud Service creates the carrier and uses this carrier on the order.
- does not specify a `ship_via`, Order Broker Cloud Service uses the default carrier you specify at the **Preferences** screen.

Default carriers for other order types:

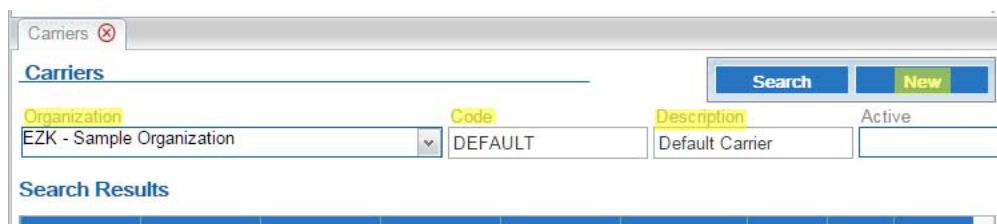
- For a pickup order, Order Broker Cloud Service uses the default PICKUP carrier it creates automatically, regardless of whether a `ship_via` is passed in the Submit Order message.
- For a ship-to-store order, Order Broker Cloud Service uses the default SHIP2STORE carrier it creates automatically, regardless 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**.

The screenshot shows a 'New Carrier' window with the following details:

- Organization: EZK - Sample Organization
- Code: DEFAULT *
- Description: Default Carrier *
- Express:
- Display in Store Connect:
- Tracking # Required:
- Weight Required:
- Rate Required:
- Active:

Buttons in the top right: Save, Cancel, Help.

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 your Organization](#) on page 1-15 for information on identifying the default unfulfillable location for the Routing Engine.

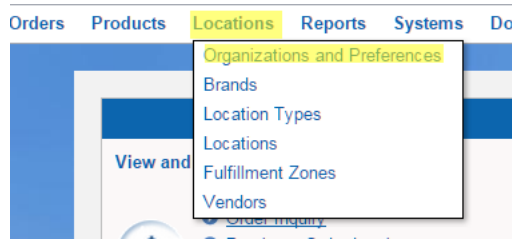
Setting up Preferences for your Organization


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.

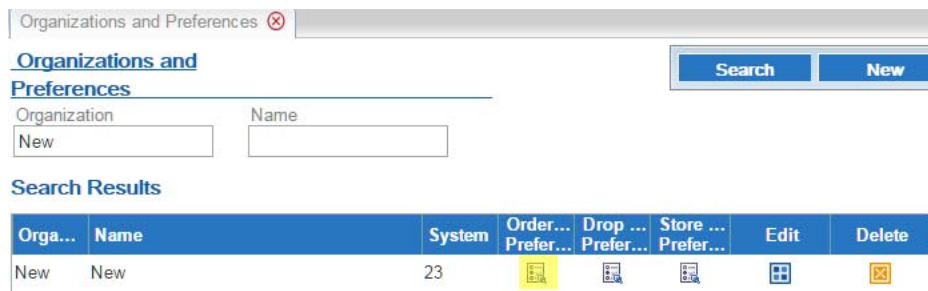
Saving again after running imports: After you import locations, products, system products, and product locations, you will need to reopen the **Preferences** screen, make

any desired updates, and select **Save** to have your preferences apply to all locations. See [Scheduling Imports](#) on page 1-19 for more information.

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

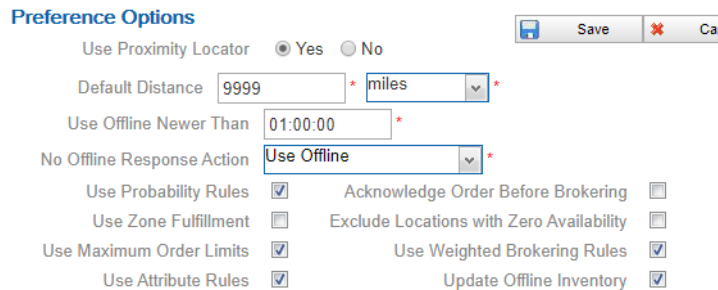


2. At the [Organizations and Preferences](#) screen, select the *Order Broker Preferences* icon () for your organization.



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.
 - * Specify the default unfulfillable location (set up through [Creating the Default Unfulfillable Location](#) on page 1-15). This location needs to have

Setting up Preferences for your Organization

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 1-13).

The screenshot shows the 'Preference Options' dialog box with the 'Fulfillment' tab selected. On the left, a tree view shows the organization structure: EZK2 (Sample Ship-for-Pickup Organi...), EZK2POS (store), and EZK2Whs (warehouse). The main area contains various settings:

- Use Proximity Locator: Yes No
- Default Distance: 9999 miles
- Use Offline Newer Than: 01:00:00
- No Offline Response Action: Use Offline
- 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: Allow Split Line
- Allow Split Order: Allow Partial Updates
- Maximum No. Responses: 9
- Default Unfulfillable Location: DEFAULT - Default Unfulfillab...
- Default Carrier: DEFAULT - Default Carrier

- 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 your 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 EZK2 - Sample Ship-for-Pickup Organization

EZK2 Sample Ship-for-Pickup Organi...

- EZK2POS store
- EZK2Whs warehouse

Preference Options

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 Order By *

On Hand Count Order By *

Location Priority Order By *

Last Order Assigned Order By *

Sales Velocity Rank Order By *

- 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 Cloud Service. 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 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.

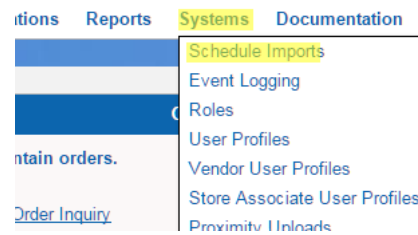
Note: If you are using the Oracle Maps Cloud Service instead of the proximity upload to support proximity locator searching, you should complete Oracle Maps Cloud Service configuration before importing locations, so that the latitude and longitude of each location can be assigned as it is created. Contact 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, it is important that you run the import for the default system before the other systems.

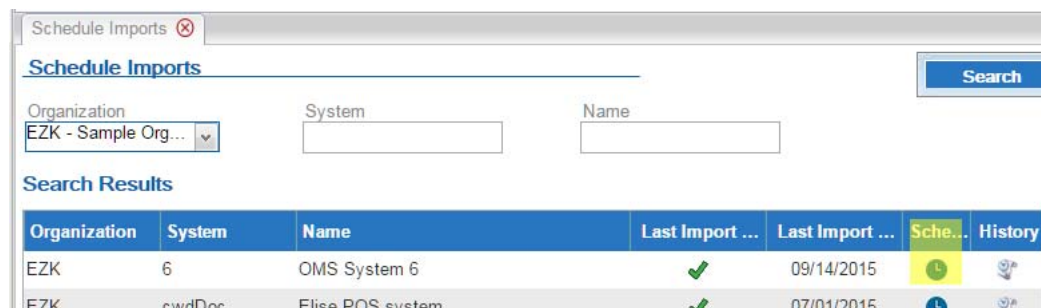
Processing steps: If you use the File Storage API, the import checks the OROB-IMPORTS container in the FILE_STORAGE table for a pipe-delimited file containing each type of information for import (location, product, system product, product location, and product bar code). Otherwise, if you use secure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

The import uses the records in these files to create or update the related records in the Order Broker Cloud Service 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.
- If you are importing from RMFCS, you need to set the *RMS Location*.
- 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.

Schedule Imports
System Import Schedule

System Import Schedule

Organization EZK2 - Sample Ship-for-Pickup Organization
System 257 - OMS 257

Confirm Organization Default System is scheduled to execute prior to non-Organization Default Systems.

Schedule

Save
Cancel

Enabled

Days to keep errors *

RMS Location

Schedule Interval

Day of Week

	Daily <input type="checkbox"/>	Sunday <input checked="" type="checkbox"/>	Monday <input type="checkbox"/>	Tuesday <input type="checkbox"/>	Wednesday <input type="checkbox"/>	Thursday <input type="checkbox"/>	Friday <input type="checkbox"/>	Saturday <input checked="" type="checkbox"/>
--	--------------------------------	--	---------------------------------	----------------------------------	------------------------------------	-----------------------------------	---------------------------------	--

Time *

Last Run

Date 18-12-2016 12:01

Run Now

Last Updated

Date 23-01-2019 15:32

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 and SIM.

Scheduling Jobs

Use the **Schedule Jobs** screen to create schedules for jobs such as daily cleanup, email notifications, and auto-cancel unclaimed pickup orders, and use the **Reschedule All** option at the **View Active Schedules** screen to start all scheduled jobs and programs. The **Reschedule All** step is required after initial system configuration to start:

- scheduled product, location, inventory, and bar code imports
- incremental inventory imports
- fulfilled inventory export
- probable quantity export
- scheduled report generation
- polling of orders for Store Connect
- daily cleanup
- email generation
- auto-cancel of unclaimed pickup orders
- cleanup job for in process orders

Scheduling Jobs: Use the **Schedule Jobs** screen to enable the Daily Cleanup, Auto Cancel Unclaimed Pickup Orders, and Email Notifications jobs, and to set the time or interval for each job.

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

The screenshot shows the 'Schedule Jobs' interface. On the left, a tree view shows 'Data Hygiene' and 'Orders' categories. Under 'Orders', 'Auto Cancel Unclaimed Pickup Orders' and 'Email Notifications' are listed. The 'Email Notifications' job is selected. On the right, the 'Email Notifications' configuration panel is visible. It includes a 'Save' button and a 'Cancel' button. The configuration details are as follows:

- Schedule Enabled:
- Schedule Interval: Minutes
- Minutes:
- Last Updated: 04/25/2017 06:33 AM auto1
- Last Run: 05/03/2017 01:21 PM
- Next Run: 05/03/2017 01:22 PM

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

The screenshot shows the 'View Active Schedules' interface. At the top, there is a 'Search' button and a 'Reschedule All' button. Below the search bar, a dropdown menu shows 'Job Name' with 'Email Notifications' selected. The search results are displayed in a table:

Job Name	Last Updated	Last Run	Next Run
Email Notifications	04/25/2017 06:33 AM a...	05/03/2017 01:33 PM	05/03/2017 01:34 PM


Adjust and Save Preferences

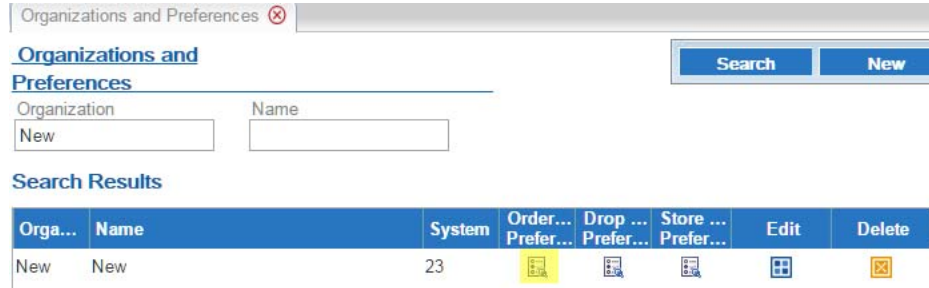
After importing locations, products, system products, and product locations, you need to return to the **Preferences** screen, make any necessary adjustments, and select **Save** again to apply the preference settings. You also need to save your preference settings after creating a new location to have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

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

The screenshot shows the navigation menu with 'Locations' selected. A dropdown menu is open, showing the following options:

- Organizations and Preferences
- Brands
- Location Types
- Locations
- Fulfillment Zones
- Vendors

- 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 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 Cloud Service authenticates the identify of the system submitting web service messages. Web service authentication is required. If Order Broker Cloud Service 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*.

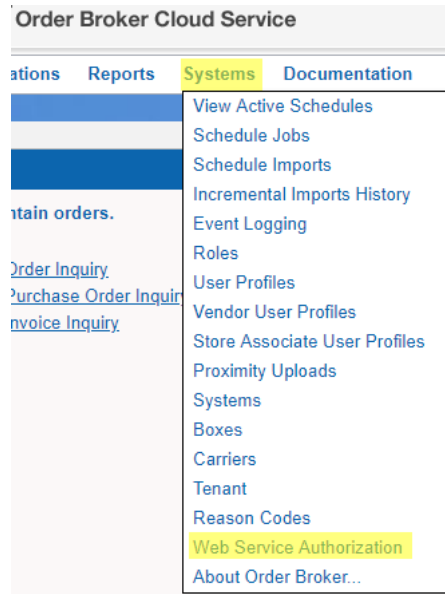
The web services requiring authentication are:


- *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 Cloud Service.
- *Locate:* Includes all requests related to the Routing Engine.
- *Private Data Request:* Includes requests to inquire on or delete private data.
- *Purchasing:* Includes all requests related to the Supplier Direct Fulfillment module.
- *Storage:* Includes all requests related to inquiring on, importing, exporting, or deleting files when you use the File Storage API.
- *Vendor:* Includes requests submitted by an integrated vendor using the Supplier Direct Fulfillment module.

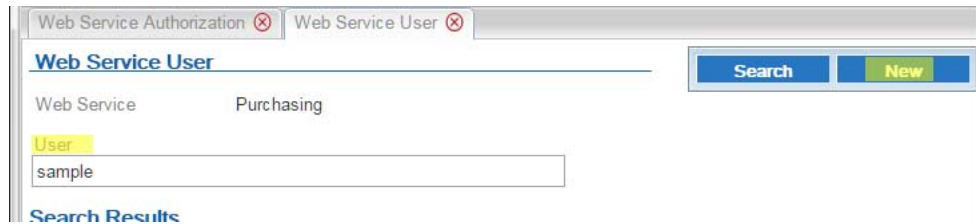
IDCS: You also need to create each user in IDCS, where you set the user’s initial password.

To create users for web service authentication:

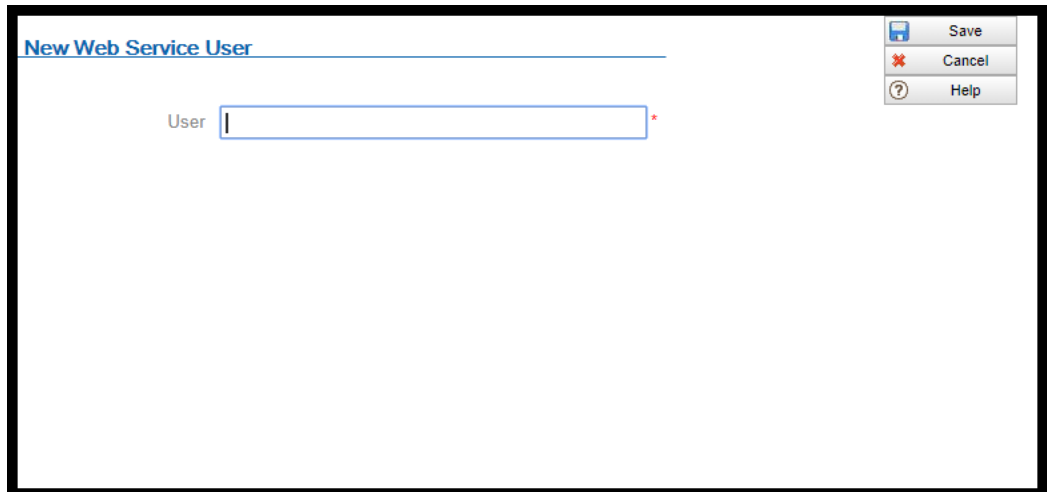
1. Select **Systems > Web Service Authorization**.



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, select **New**.



4. At the **New Web Service User** window, enter the *User ID* 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.

Orders Products Locations Reports Systems Document

Web Service Authorization Web Service User

Web Service User

Web Service Purchasing

User

6. Repeat the steps above for each web service that you will be using.

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