Oracle® Retail Order Broker Cloud Service

Administration Guide

Release 18.2

September 2019

ORACLE®

Oracle® Retail Order Broker Cloud Service Administration Guide, Release 18.2

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Oracle Retail Order Broker Cloud Service Administration Guide, Release 18.2

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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 18.2 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 18.2 documentation library at the following URL:

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

Customer Support

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- Product version and program/module name

- 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

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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.
italic	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.

1

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.

In this chapter:

- [Creating the Default Unfulfillable Location](#) on page 1-15
- [Setting up Preferences for your Organization](#) on page 1-15
- [Scheduling Imports](#) on page 1-19
- [Scheduling Jobs](#) on page 1-21
- [Setting up Web Service Authentication](#) on page 1-23

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 or higher: 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 takes place using the password defined for the user in Oracle Identity Cloud Service (IDCS); however, if OAuth authentication is enabled, the user ID defined in Order Broker for a Web Service user maps to a client ID defined in IDCS, and IDCS defines a token for web service authentication, rather than a password.

About OAuth: OAuth is a standard for web service authentication through the use of access tokens rather than passwords.

- All users must be set up both in IDCS (for password or OAuth token 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.

- 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 first.last with a Cloud Service User ID of first.last@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 first.last user for Order Broker, you can also create a `first.last` Vendor Portal user or web service user, or both. You could also create a Store Connect user with a user ID of `first.last`, or with a Cloud Service User ID of `first.last@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

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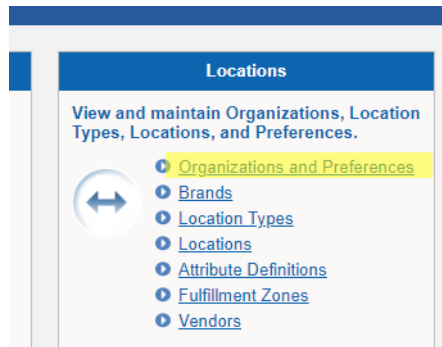
2. At the **Organizations and Preferences** screen:

    -   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**.

    -   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

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

[Save]   [Cancel]

* 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.
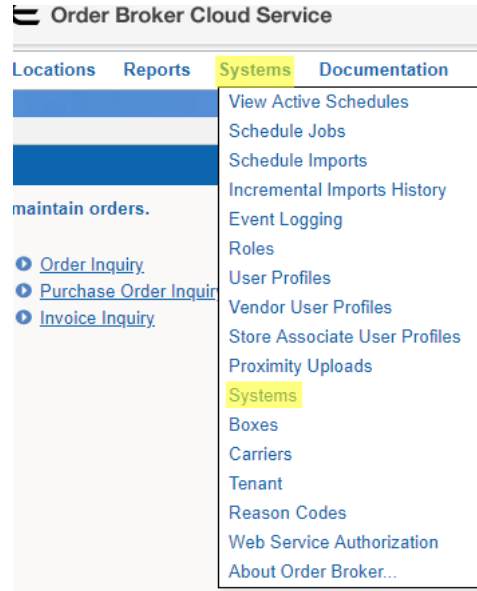
2. At the **System** screen:

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.
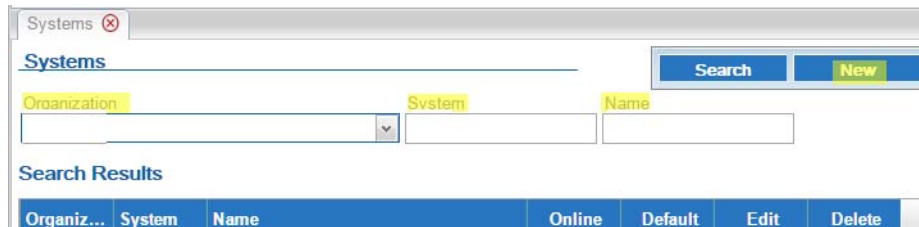
   - Click **New**. If:

     * 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;

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

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
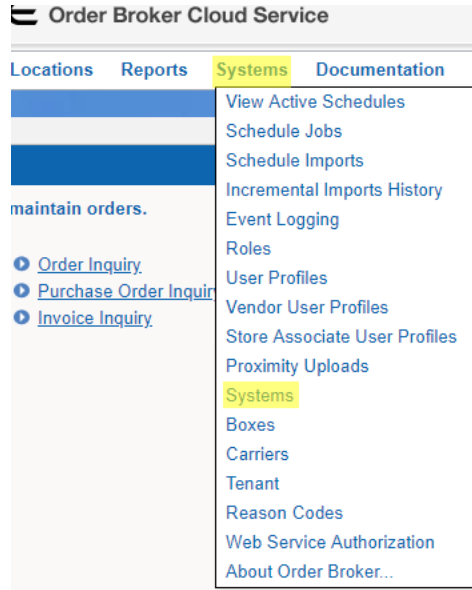
Follow the steps below to create:

- 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.
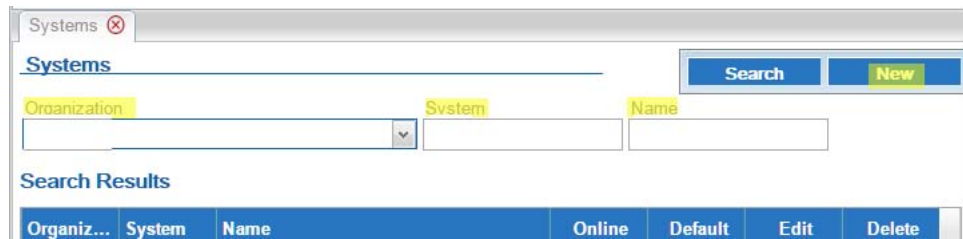
3. Enter a system code in the *System* field. System codes can be 1 to 10 positions in length, can include spaces and special characters, and must be unique within the organization.

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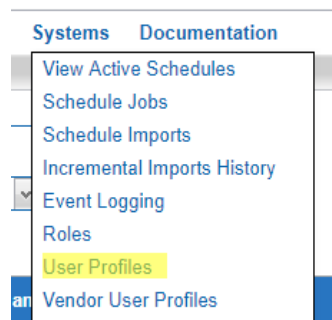
2. At the **User Profiles** screen, enter:

   - 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.
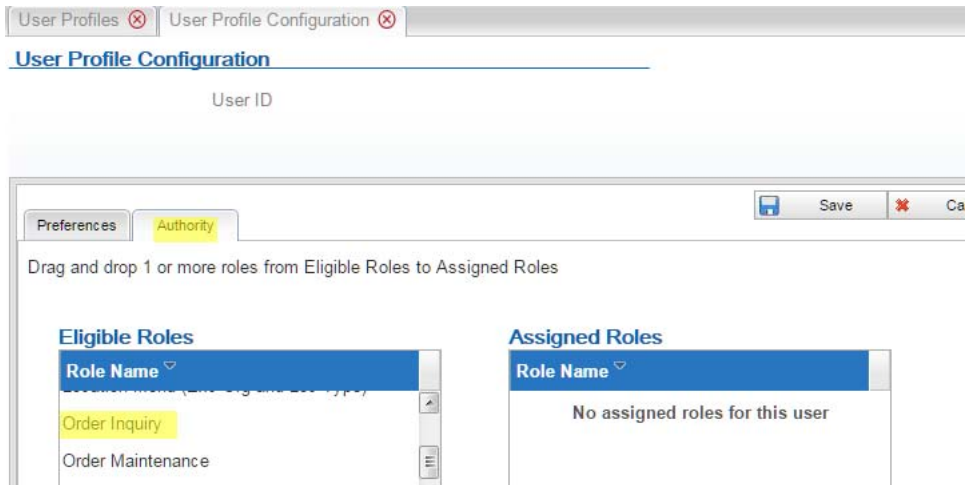
• Select **New**.

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.

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

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 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.
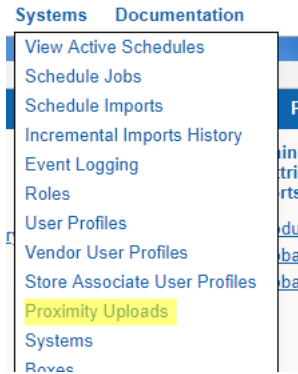
Uploading Proximity Data

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.
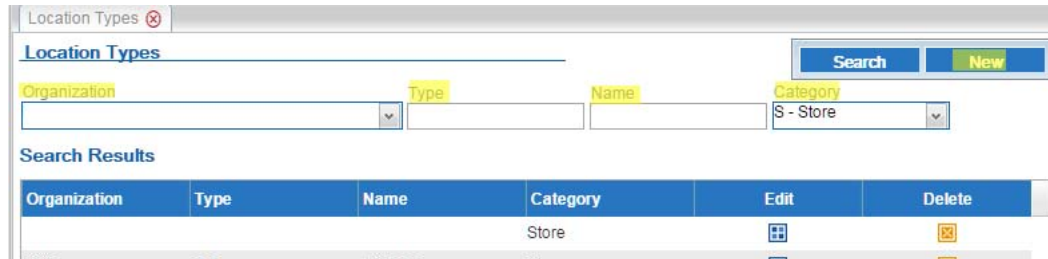
3. In the *Type* field, enter a code to represent the location type. The code cannot exceed 10 positions.

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.

*   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.

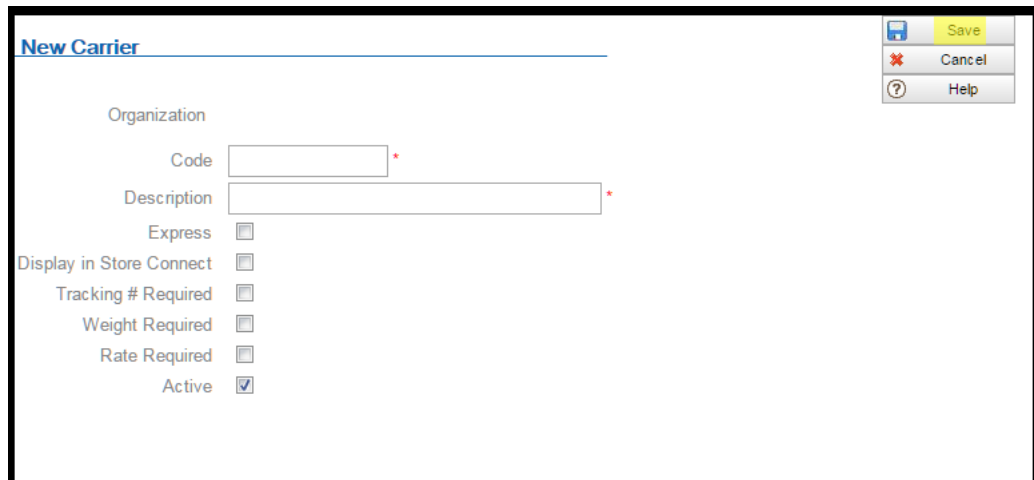The following steps are required to set up the default carrier:

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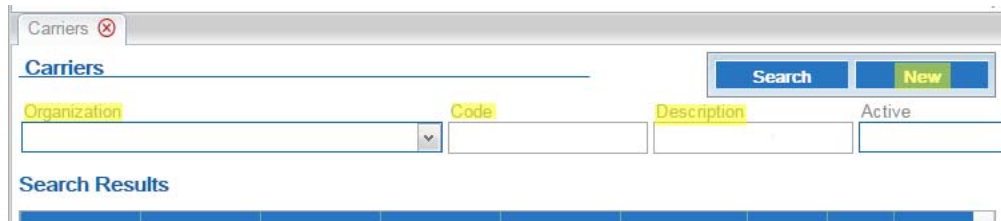
3. At the **New Carrier** window, complete any additional fields and select **Save**.

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.
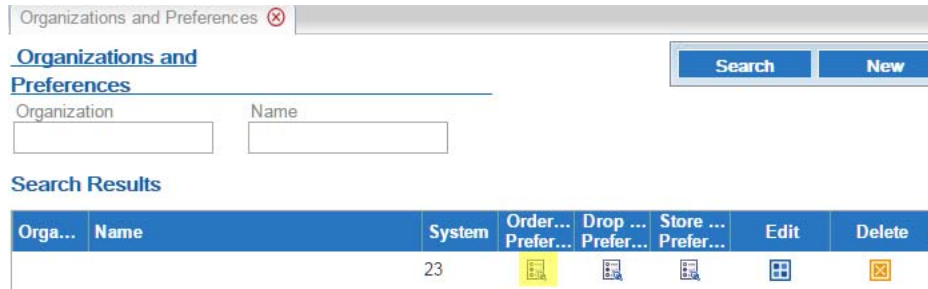
3. At the **Preferences** screen:

   - 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.
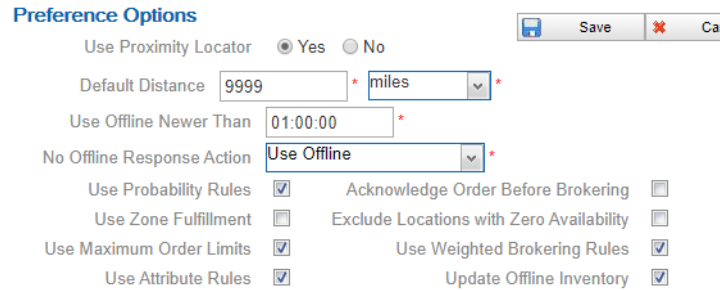
   - At the **Order Broker Settings** tab:

      * 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 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).

- 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.

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

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

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

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? In order to create product records in the default system before you create system product records in any other systems, 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. 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.
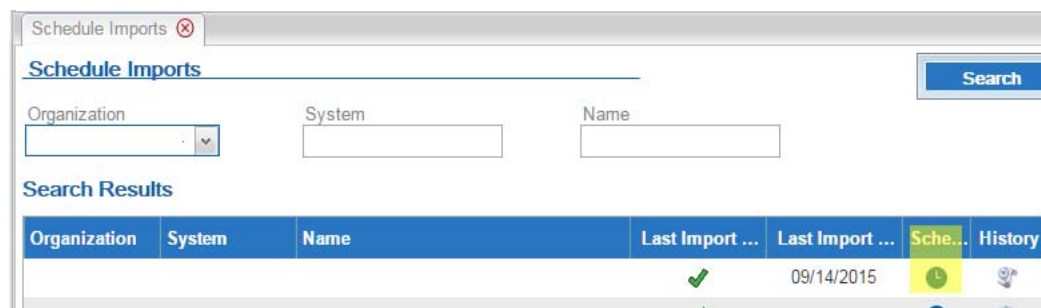
3. At the **System Import Schedule** screen:

   - 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.

   - If you are importing from OCDS and running the import immediately rather than scheduling, you can use the options under **Last Run** to specify whether to perform a *Full Refresh* or an update since the last import or since a specified date and time. These options are available only if a system in the organization has at least one of the URLs specified at the OCDS Integration Services tab at the System screen flagged as Active. See **Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS)** in the online help or Operations Guide for more information.

   - 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 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, Sales Order Data Export, and Email Notifications jobs, and to set the time or interval for each job.

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

Schedule Jobs

Email Notifications Job

This job sends email notifications to the retailer and customer from Store Connect and Supplier Direct Fulfillment processes.

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


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.**

2. At the **Organizations and Preferences** screen, select the *Order Broker Preferences* icon ( ) for your organization.
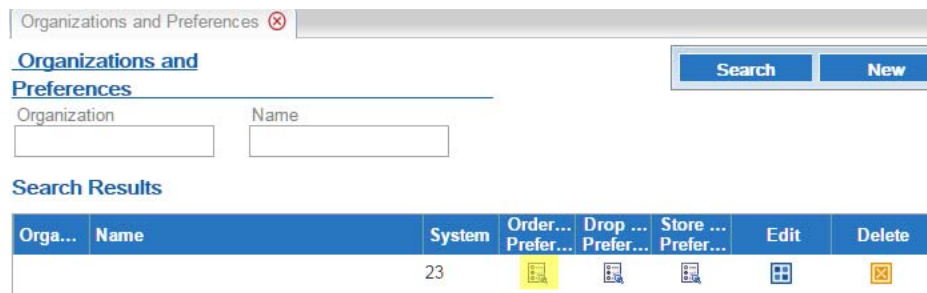
At the **Preferences** screen, make any necessary changes at the organization, location type, or location type level, and select **Save**.

Setting up Web Service Authentication

About web service authentication: By setting up and requiring user IDs and passwords or OAuth authentication 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 unless using OAuth.
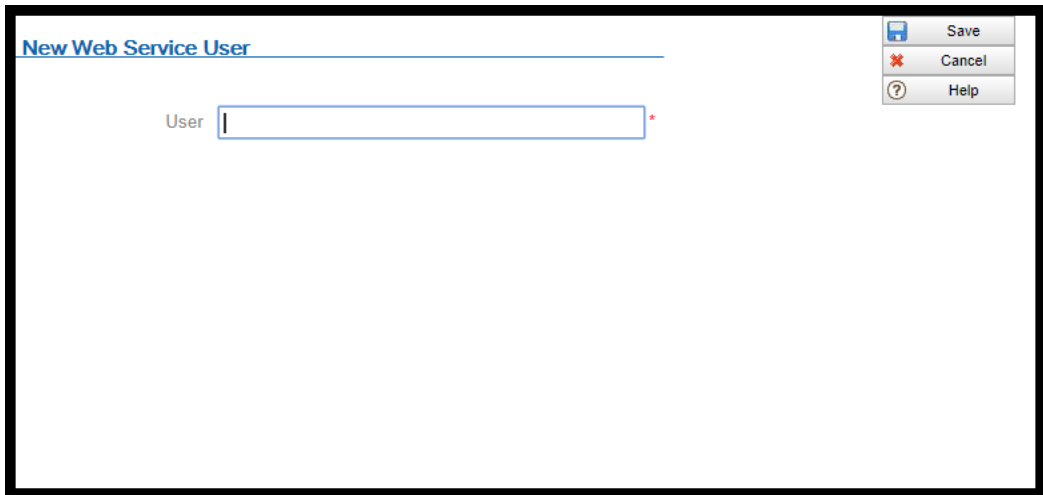
To create users for web service authentication:

1. Select **Systems > Web Service Authorization**.
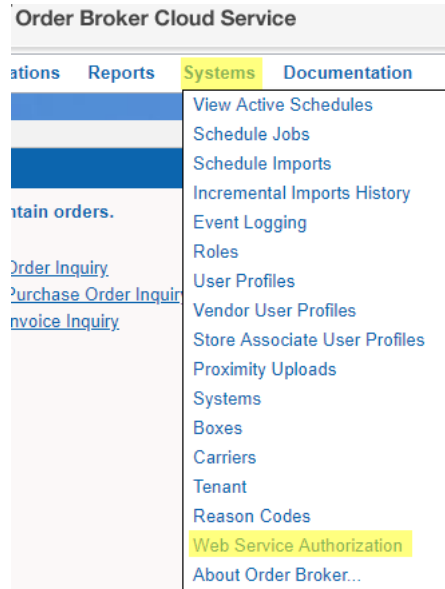
2. At the **Web Service Authorization** screen, select the *Edit* icon ( ) for a web service you will be using.

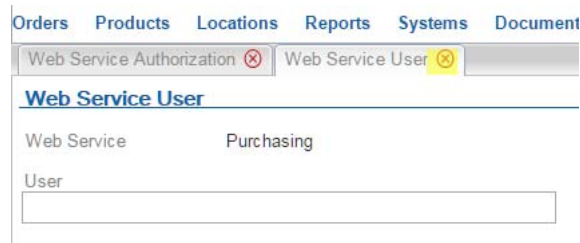3. At the **Web Service User** screen, select **New**.

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

> **Note:** If you use OAuth for authentication of inbound web services, the User specified here is the IDCS Client ID that generates the OAuth token.

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.

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.