

Oracle® Retail Customer Engagement

Release Readiness Guide



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ORACLE®

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Preface

This guide outlines the information you need to know about Customer Engagement new or improved functionality in this update, and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

Audience

This document is intended for the users and administrators of Oracle Retail Customer Engagement Cloud Service.

Documentation Accessibility

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Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

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When contacting Customer Support, please provide the following:

- 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

Oracle Help Center (docs.oracle.com)

Oracle Retail product documentation is available on the Oracle Help Center at <https://docs.oracle.com/en/industries/retail/index.html>.

(Data Model documents can be obtained through My Oracle Support.)

Comments and Suggestions

Please give us feedback about Oracle Retail Help and Guides. You can send an e-mail to: retail-doc_us@oracle.com

Oracle Retail Cloud Services and Business Agility

Oracle Retail Customer Engagement Cloud Service is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

1

Feature Summary

This chapter describes the feature enhancements in this release.

Noteworthy Enhancements

This guide outlines the information you need to know about new or improved functionality in the Oracle Retail Customer Engagement (ORCE) update and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

Column Definitions

- **Feature:** Provides a description of the feature being delivered.
- **Module Impacted:** Identifies the module associated with the feature, if any.
- **Scale:** Identifies the size of the feature. Options are:
 - **Small:** These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.
 - **Medium:** These UI or process-based features are typically comprised of field, validation, or program changes. Therefore, the potential impact to users is moderate.
 - **Large:** These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.
- **Delivered:** Is the new feature available for use immediately after upgrade or must the feature be enabled or configured? If no, the feature is non-disruptive to end users and action is required (detailed steps below) to make the feature ready to use.
- **Customer Action Required:** You must take action before these features can be used. These features are delivered disabled and you choose if and when to enable them.

Table 1-1 Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Partial Quantity Points	Program	Medium	Yes	No
Refresh Account Balance	Program	Small	Yes	No
Customer Rest Service	Customer	Medium	Yes	No
Customer Jet Redwood	Customer	Small	Yes	No
Customer Order Information	Customer	Medium	Yes	Yes

Table 1-1 (Cont.) Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Customer Order Rest Service	Customer	Large	Yes	Yes
Transaction Rest Service	Customer	Large	Yes	Yes
Technical Enhancement	All	Small	Yes	No

New Feature Descriptions

This section describes the new features.

Partial Quantity Points

The Loyalty Points calculation is updated to calculate the points based on a partial/fractional quantity. Previously, the quantity was rounded up to the nearest whole number prior to calculation which resulted in rewarding too many points:

- A new system configuration, Loyalty Transaction Quantity Rounding Mode, will determine how the quantity is rounded, or if the actual quantity is used, **prior** to points calculation.
- The rounding mode selected will affect the following points calculation: sales, unverified returns, points recovery, and when requesting a points calculation using the Proforma Request.
- The rounding of the partial quantity prior to points calculation is updated for both issue rules: the quantity of each item purchased and the value of each item purchased.
- Additionally, the updates are also applied to the following promotion types when issuing bonus points based on the multiplier: Points for Purchase, Bounceback with Bonus Points, Product with Bonus Points, and Coupon with Bonus Points.

Refresh Account Balance

The Card Dashboard screen is updated to refresh the balance displayed under the Account Details section of the screen. Previously, the balance was only updated in the Account List section of the screen:

- The balance for a tender account will reflect the update when an amount is redeemed, reloaded, released authorization, or preauthorized.
- The YTD and LTD will reflect the updates when points are recovered, transferred, or issued as well as the level changed, or an award is issued with points cost.
- The balance for an award account will reflect the update when an award is transferred and an e-award is issued or expired for the award program on the account.

Customer Rest Service

The Customer Services API in ORCE is being modernized from SOAP to REST to improve performance, support flexible integration, and align with modern architectural standards:

- The activeFlag tag will now indicate whether an address, email, or phone record is active (true) or inactive/deleted (false), enabling better visibility into current and historical data.
- The createDate and updateDate tags will continue to track the original creation and most recent update timestamps of each record.
- The updated REST service will support filtering by activeFlag, while also returning both active and inactive records by default if no filter is applied.

Customer Jet Redwood

The following features are included:

- Modal Field Labels for Alternate Key and Security Group
- Added a right-sided drawer for the Note to Task feature

Customer Order Information

Customer Order details are available for associates to view for a customer based on their purchase activity:

- A new system configuration, Enable Customer Order Ingestion, determines if customer order data from a third party will be processed and stored in the ORCE application.
- The Order ID is available for searching on the Item Purchase History screen. Additionally, the Order ID is shown with a corresponding link that allows the associate to view the order details when associated with a transaction.
- A new Order Details popup displays similar information as the Transaction Details popup and also includes status changes, shipping method, and tracking numbers.
- The Order ID has also been added to the Purchase Details popup for each reference where it applies.

Customer Order Rest Service

The Customer Order Services API in ORCE is a new REST-based service that enables the ingestion and retrieval of customer order and purchase history:

- The service allows external systems to submit customer orders including both online and in-store purchases into ORCE for processing and storage.
- Third-party applications are allowed to retrieve comprehensive customer order and purchase history from ORCE that covers both digital and brick-and-mortar transactions.

Transaction Rest Service

The Transaction Services API in ORCE is being modernized from SOAP (Poslog Services) to a REST-based service to improve performance, support flexible integration, and align with modern architectural standards:

- External systems are able to add transactions containing order details directly into ORCE for centralized processing and storage.

- Multiple retrieval options are provided to access transactions along with their associated order information.

Technical Enhancement

Performance improvements related to Oracle Text Indexes and system maintenance tasks are included in this release.

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Browser Requirements and Compatibility

Note

Oracle Retail assumes that the retailer has ensured its Operating System has been patched with all applicable Windows updates.

The following browsers are supported:

- Mozilla Firefox
- Microsoft Edge
- Google Chrome (Desktop)

Microsoft has deprecated Internet Explorer 11 in Windows 10 and recommends using Edge as the default browser. Refer to the [Oracle Software Web Browser Support Policy](#) for additional information.

Supported Oracle Products

Application

Oracle Retail Xstore Point of Service

Oracle Retail Order Management System Cloud Service (OROMS)

Oracle Retail Order Administration Cloud Service (OROACS)

Oracle Retail Omnichannel Data Service (OCDS)

Oracle Marketing Cloud

Oracle Retail Insights Cloud Service

Oracle Retail Merchandise Foundation Cloud Service (RMFCS)

Oracle Retail Data Store (RDS)

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Noteworthy Resolved Issues

For the Noteworthy Resolved Issues document for this release, see the following on My Oracle Support (MOS): Oracle Retail Customer Engagement Cloud Service Documentation Library at [Doc ID 1994453.1](#).

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Deprecated Features

As part of the continuous delivery model for cloud services, features and technical components of a solution may be removed or replaced to enhance the security, performance, and overall quality of the cloud service. When this occurs, the deprecation of a feature or component will be announced in advance, allowing customers sufficient time to anticipate the change and transition to any enhanced replacement feature/component. After the deprecation is announced, the deprecated feature or component will remain in the solution until the planned removal date and will not be enhanced or made compatible with other new features.

For more information about deprecated functionality in this product, see the Deprecation Advisory accessed from the following Documentation Library: Oracle Retail Customer Engagement Cloud Service Documentation Library MOS Doc ID [1994453.1](#).