

Oracle[®] Retail Order Broker Cloud Service

Administration Guide



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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 20.2 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*
- *Order Broker Cloud Service Store Connect Online Help*

See the Order Broker Cloud Service 20.2 documentation library at the following URL:

<https://docs.oracle.com/en/industries/retail/index.html>

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To contact Oracle Customer Support, access My Oracle Support at the following URL:

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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

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Conventions

The following text conventions are used in this document:

Table Text Conventions

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.

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.

Allow list: Retailers need to make sure that Oracle staff include all URLs, such as logos and those used for integrations, on the allow list for Order Broker Cloud Service. URLs that need to be on the allow list include:

- The *Logo URL* and *Shipper URL* (if not ADSI) at the **Drop Ship Preferences** screen.
- The *Logo URL*, *Logo URL (packing slip)*, *Shipper URL* (if not ADSI), and *Logo URL (email)* at the **Store Connect Preferences** screen.
- The *Logo URL* at the **New Brand** screen or the **Edit Brand** screen.
- The *Job Notification URL* at the **Event Logging** screen.
- The *URL* at the **Inventory Service** tab of the **System** screen.
- The *URL* in the **Outbound Orders Service** area of the **RICS Integration** tab of the **System** screen.
- The *Store Location URL*, *Warehouse Location URL*, *Products URL*, *Store Inventory URL*, and *Warehouse Inventory URL* at the **OCDS Integration** tab of the **System** screen.
- The *Tenant Logo* and the *Geocode Address* at the **Tenant** (retailer information) screen or the **Tenant-Admin** screen.
- The *Endpoint URL for IDCS* and the *Turn-by-Turn Distance URL* at the **Tenant-Admin** screen.

“From” email addresses: Email addresses must be approved in order to be used as return addresses on emails generated by Order Broker. Please change the default email addresses specified at the **Event Logging** screen and the *Cust Service From Email Address* specified at the **Store Connect Preferences** screen, and contact your Oracle representative to have the new email addresses approved.

! **Important:**

In this document, user details / company name / address / email / telephone number represent a fictitious sample. Any similarity to actual persons, living or dead, is purely coincidental and not intended in any manner.

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.

- **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 or clients. See [Creating User Profiles](#) for more information.
- **Upgrade:** 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 or clients, if their records do not already exist in IDCS. Users can use the *Can't sign in?* link at the login page to set their passwords.

See [Creating User Profiles](#) for more information on creating users.

Logging in for the First Time

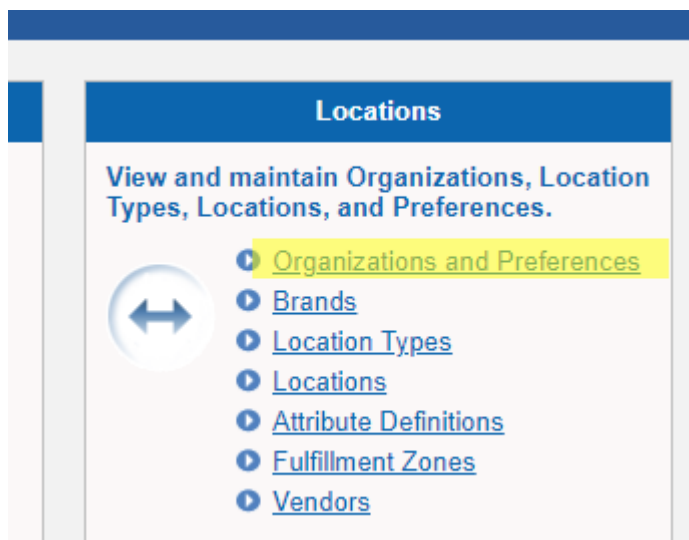
Use IDCS: You need to select the *Use IDCS* flag at the Tenant-Admin screen if it is not already selected. To display this screen, select **Systems > Tenant** while logged in as the default admin user. If the flag is not already selected, select it now.

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.

 **Note:**

Ship for pickup is automatically enabled when you create a new organization in Order Broker Cloud Service 20.0 or higher, and in this case retail pickup and ship-to-store orders are not enabled.

- Complete the **Data Formats** fields to control the formats for reports, forms, and system-generated emails.

New Organization

Organization SAMPLE

Name

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 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.

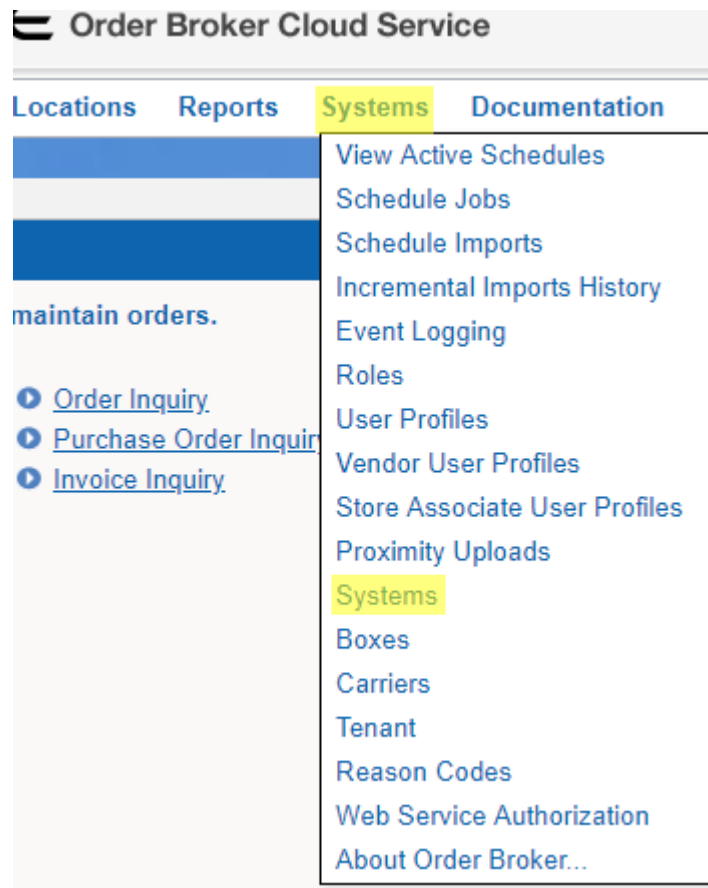
 **Note:**

If you integrate with Order Management System, 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 *OROB System (K50)* system control value.

 **Note:**

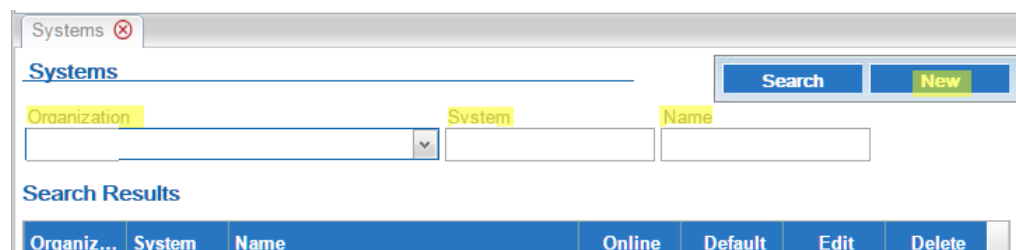
The system flagged as the Vendor Default should not be the default system for the organization.

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



2. At the **Systems** screen:

- 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, 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.

 **Note:**

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 integration: The code for the Order Management 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 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

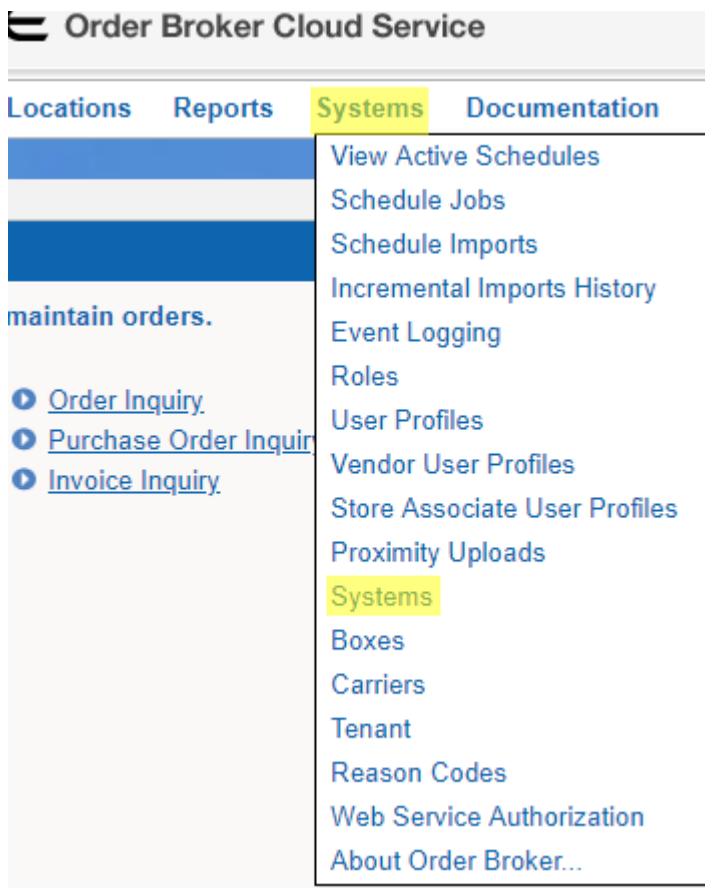
Follow the steps below to create:

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

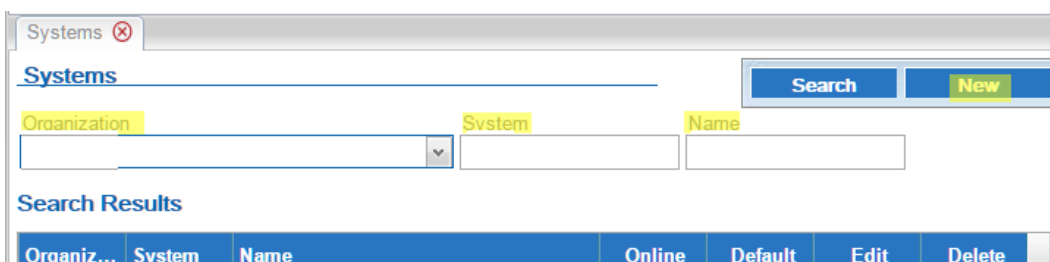
 **Note:**

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 **Systems** screen select your organization from the *Organization* drop-down box.



 **Note:**

When creating the Store Connect system, you should not use a system code that begins with STC-, as these characters are used as part of the name for the user group in IDCS. You can use STC_ (with an underscore rather than a hyphen) instead.

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.
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 displays an error message;
 - Otherwise, you advance to the **System** screen, where you can complete the creation of the system.

The screenshot shows the 'System' configuration screen. At the top, there are two tabs: 'Systems' and 'System'. Below the tabs, the 'System' title is displayed. The main form contains several fields and options: 'Organization' is a dropdown menu with 'New - New updated' selected; 'System' is a text input field with 'sample' entered; 'Name' is an empty text input field. Below these are three checkboxes: 'Organization Default', 'Vendor Default', and 'Store Connect Default'. A horizontal tab bar is present with 'Inventory', 'Orders', 'Reservation', 'RICS Integration', and 'OCDS Integration Import'. Underneath the tabs are more fields: 'Online' (checkbox), 'Inventory Qty Export' (checkbox), 'Track Fulfilled Qty' (dropdown menu with 'Do Not Track Fulfilled' selected), and 'Connection Type' (dropdown menu with 'None' selected). A 'Save' button is located in the top right corner of the form area.

6. 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 User Profiles

This section consists of three main subjects:

- Before You Start: Background on IDCS Integration
- IDCS User Synchronization
- Scheduling the Identity Cloud User Synchronization Job

Before You Start: Background on IDCS Integration

Background on user mapping with IDCS and user setup:

- 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.

- Role assignments in Order Broker control the user's screen and feature authority at Order Broker, Store Connect, and Vendor Portal screens. You can change the role assignments for existing users through the **Role Wizard**. See the *Role Wizard* in the online help 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.
- 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.
- 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.

Multiple omnichannel systems: You can use the same IDCS user records for multiple omnichannel 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 an uppercase user ID, user validation is not case-sensitive, so a lowercase user ID from IDCS passes validation.

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

IDCS User Synchronization

About identity cloud service user synchronization: Use IDCS to create users for omnichannel applications, including Order Broker Cloud Service and Oracle Retail Order Management System Cloud Service. Users that exist in IDCS and are configured there for Order Broker Cloud Service access are then created in Order Broker Cloud Service:

- Through the **Identity Cloud User Synchronization** job, available through the **Schedule Jobs** screen, or,
- Automatically, when the user logs into Order Broker Cloud Service.

 **Note:**

If a user exists in IDCS for another application but has not been configured for Order Broker access, the user will not be able to log into Order Broker. Instead, the user advances to the Unauthorized Access screen. If the user requests and is granted access to Order Broker while still at this screen, they can use the **Retry** option to log into Order Broker.

Users are created in Order Broker Cloud Service with the default authority defined from IDCS, described below.

If you need to create Store Associate users and/or Vendor users in addition to Order Broker Cloud Service users, see [Creating Vendor Users](#) or [Creating Store Associate Users](#), below.

The **Identity Cloud User Synchronization** job does not delete, deactivate, or update authority for any user records, including vendor users and store associates, in Order Broker Cloud Service. Use the related screen in Order Broker Cloud Service to update users once they have been created.

Web service authentication: The **Identity Cloud User Synchronization** job does not create web service users. See [Setting up Web Service Authentication](#) for information on creating web service users.

Required Setup for IDCS User Synchronization

The following steps describe creating Order Broker Cloud Service (retailer) user profiles.

Setup at the Tenant (admin) screen: Complete the **Identity Cloud Service** settings at the **Tenant** screen:

- **Use IDCS:** This flag must be selected.
- **Client ID:** The Name identifying Order Broker Cloud Service as an application in IDCS. Typically formatted as `RGBU_OBCS_ENV_APPID` where `OBCS` identifies Order Broker Cloud Service and `ENV` identifies the environment, such as production.
- **Endpoint URL:** The URL to use for requests to IDCS.
- **Client Secret:** The client secret assigned by IDCS and used for authentication. Select **Show Secret** in the Configuration tab in IDCS to display the secret.

See the **Tenant (admin)** screen in the online help for more information.

About the default user: The `default` user is created automatically, with a user name of Identity Cloud Default User. This is not an actual user record that can log into Order Broker Cloud Service; instead, it serves as a template for creating actual users. You cannot delete the `default` user.

Configuring the default user: Before creating additional, actual users, update the `default` user with the settings to apply to actual users when they are created in Order Broker Cloud Service:

- Role assignments with a *Role Type* of **Retailer**, controlling the default authority to Order Broker Cloud Service screens. See the Role Wizard for more information.

- The *Default Shipping System* that controls system product code to display as the **Item #** at the **Order** screen, as well as the organization to default at other screens.

Multiple groups of users: You can modify the configuration of the `default` user if you will import multiple groups of users into Order Broker Cloud Service. For example, you could first configure the `default` user with just order inquiry and maintenance authority, import a group of users, and then reconfigure the `default` user with different authority for the next group of users.

User Creation in IDCS

You can use the following process in IDCS to create users and control their attributes through group assignment, using the application record in IDCS for Order Broker Cloud Service. The application record typically has a *Name* such as `RGBU_OBCS_<ENV>_APPID`, where `ENV` represents the environment.

- Create one or more groups to use for assignment of roles to users. For example, create an `ob_users` group to use for creation of regular users, and an `ob_admin` group to use for creation of admin users. Assign the group to the appropriate application role in IDCS: either `OBCS_Admin` or `OBCS_User`.
- Create each user in IDCS, specifying the user's first name, last name, user name, and email address.

About defining the user name in IDCS:

- The user name be lower case.
- The user name in Order Broker cannot exceed 10 positions, so the name assigned in IDCS will be truncated in Order Broker if it exceeds 10 positions. If multiple users imported from IDCS share the same first 10 positions of the user name, the import process will use the first 9 positions and assign a unique character as the 10th position. For example, if user names created in IDCS are `joannejohnson` and `joannejohnston`, the first user created in Order Broker is `joannejoh1`, and the second user created in Order Broker Cloud Service is `joannejoh2`.
 - * Assign each created user to the appropriate group.
 - * Assign each group to the Order Broker application in IDCS.
 - * Assign each user to the appropriate application role in IDCS.
 - * Assign or reset the password for each user in IDCS. This triggers an email to the email address specified for the user, who can log in using either the user name defined in IDCS if it does not exceed 10 positions, or the email address.

Note:

If the user logs in after configuration in IDCS, this creates the user record in Order Broker Cloud Service; otherwise, the record is created through the import job, described below.

Importing Users through the IDCS User Synchronization Job

After completing the required setup describe above, Select **Systems > Schedule Jobs** and run the **Identity Cloud User Synchronization** job to import the new users from IDCS.

[Schedule Jobs](#)**Identity Cloud User Synchronization**

This job synchronizes users created in Identity Cloud Service.

The screenshot shows the configuration page for the 'Identity Cloud User Synchronization' job. On the left, a tree view lists various jobs, with 'Identity Cloud User Synchronization' highlighted. The main configuration area includes:

- Schedule Enabled:** A checked checkbox.
- Schedule Interval:** Set to 'Daily'.
- Time:** A time picker set to '14:49' with 'HH:mm' format.
- Run Now:** An unchecked checkbox.

 At the top right, there are 'Save' and 'Cancel' buttons. Below the configuration area is a 'Job Summary' link.

Each new user is created in Order Broker with the application role assignments from IDCS:

- The user ID, name, email address, and cloud service user ID are from IDCS; however, if the user ID is longer than 10 positions or is a duplicate of an existing user ID of 10 positions, it is truncated as described above.
- The admin flag is selected if the user is assigned to the OBCS_Admin application role in IDCS.
- The role-based authority is from the `default` user's current settings.

After creation: Once users are created in Order Broker, you can maintain them; for example, you can change the email address, date formats, user name, authority, and default shipping system for Order Broker users, and you can flag a user as inactive so that the user cannot log in; however, this does not update the user's record in IDCS. You can also delete the users from Order Broker, although this does not delete the corresponding records in IDCS, and the user would be created again in Order Broker Cloud Service the next time the synchronization job runs.

 **Note:**

The synchronization job does not update existing users in Order Broker.

Creating Vendor Users

If you also need to create vendor users in Order Broker, use the following process:

- In Order Broker, create one or more vendors. See the **Vendors** screen in the online help for more information.
- In Order Broker, create one or more role assignments with a *Role Type* of **Vendor**, controlling the default authority to Vendor Portal screens. Select the *Identity Cloud User Default* flag at the **Specify Role Name** step of the **Role Wizard**.
- In Order Broker, run the **Identity Cloud User Synchronization** job to create the vendor user groups in IDCS corresponding to each vendor created in Order Broker. The vendor user group is created as `<system>|<vendor>`, where `<system>` is the system code identifying the default vendor system, and `<vendor>` is the code identifying the vendor. The synchronization job performs this creation in IDCS each time it runs based on the existing roles in Order Broker.

- In IDCS, assign each vendor user group to the OBCS_Vendor_User application role for the Order Broker application.
- In IDCS, create each vendor user and assign it to the vendor user group associated with the same vendor. See [User Creation in IDCS](#) for background on creating the user in IDCS and notes about defining the user name.

 **Note:**

Assign the vendor user only to the vendor user group associated with the correct vendor. Order Broker does not support assigning a vendor user to more than one vendor.

- Run the **Identity Cloud User Synchronization** job again to import new vendor users from IDCS. The vendor users are assigned role-based authority based on the vendor role types set up through the **Role Wizard** with the Identity Cloud User Default flag selected.

 **Note:**

The synchronization job does not update existing vendor users in Order Broker.

Creating Store Associate Users

If you also need to create store associate users in Order Broker, use the following process.

- In Order Broker, create the default Store Connect system for your organization. See the **Systems** screen in the online help for more information.
- In Order Broker, create one or more role assignments with a *Role Type* of **Store Associate**, controlling the default authority to Store Connect screens. Select the *Identity Cloud User Default* flag at the **Specify Role Name** step of the **Role Wizard**.
- In Order Broker, run the **Identity Cloud User Synchronization** job to create store user groups in IDCS for each system that is flagged as the Store Connect default for an organization. The user group is named STC-SYSTEM, where SYSTEM is the system code of the Store Connect default system in your organization. The synchronization job performs this creation in IDCS each time it runs based on the existing roles in Order Broker.
- In IDCS, assign each store user group to the OBCS_Store_User role.
- In IDCS, create each store associate user and assign it to the store user group associated with the appropriate system. See [User Creation in IDCS](#) for background on creating the user in IDCS and notes about defining the user name.
- In Order Broker, run the **Identity Cloud User Synchronization** job again to import new store associate users from IDCS.
- Use the **Edit Store Associate User Profile** screen to finish configuration of the store associate user, including assigning one or more locations and flagging the user as active. The *Requires Location* field at the **Store Associate User Profiles** screen indicates that the store associate user requires location assignment.

 **Note:**

The synchronization job does not update existing store associate users in Order Broker.

Scheduling the Identity Cloud User Synchronization Job

At the **Schedule Jobs** screen schedule the **Identity Cloud User Synchronization** job to run daily.

Assigning the Default Shipping System to the Admin User Profile

Follow the steps above under [Creating User Profiles](#) 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

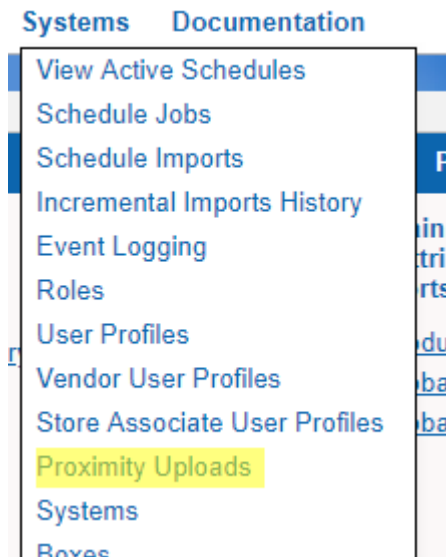
About proximity data: Proximity data enables you to search for merchandise or assign orders based on the approximate distance from a store, warehouse, or customer address.

 **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.

 A screenshot of the Oracle Order Broker Cloud Service 'Location Types' screen. The 'Organization' drop-down is selected, and the 'Category' is set to 'S - Store'. The 'Search Results' table shows one entry for 'Store'.

Organization	Type	Name	Category	Edit	Delete
			Store		

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:

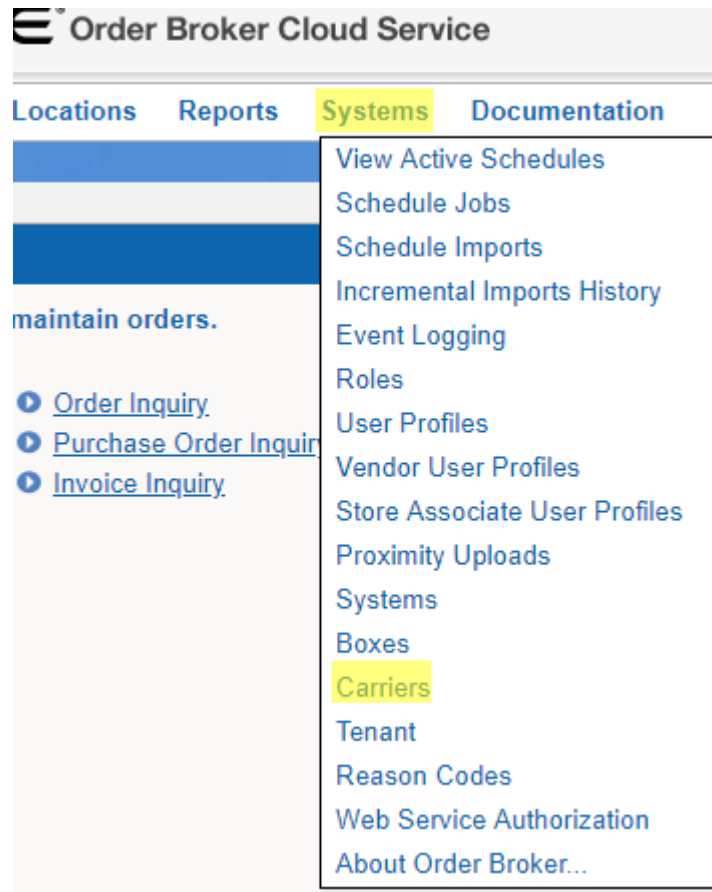
- specifies a *ship_via* that matches a carrier you have set up through the **Carriers** screen, Order Broker Cloud Service uses this carrier on the order and resets the carrier as active, if needed.
- specifies a *ship_via* that does not match a carrier you have set up through the **Carriers** screen, 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:

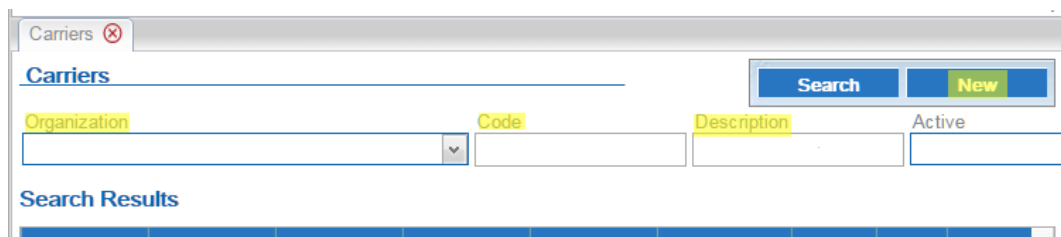
- For a pickup order, Order Broker Cloud Service uses the default PICKUP carrier it creates automatically, regardless of whether a `ship_via` is passed in the Submit Order message.
- For a ship-to-store order, Order Broker Cloud Service uses the default SHIP2STORE carrier it creates automatically, regardless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

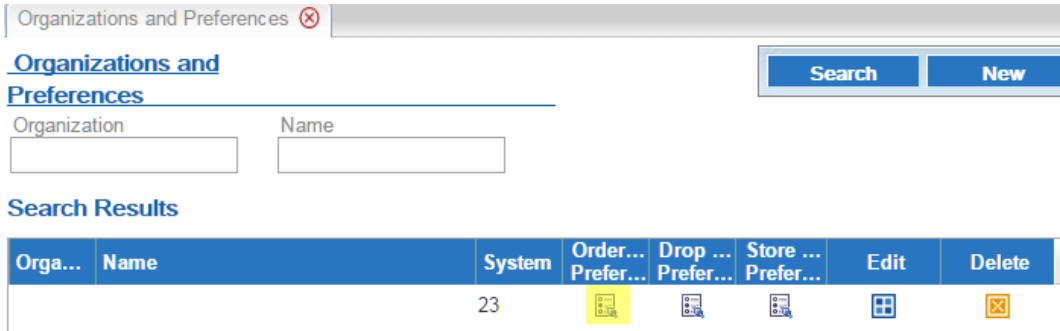
Saving again after running imports: After you import locations, products, system products, and product locations, you will need to reopen the **Preferences** screen,

make any desired updates, and select **Save** to have your preferences apply to all locations. See [Scheduling Jobs](#) for more information.

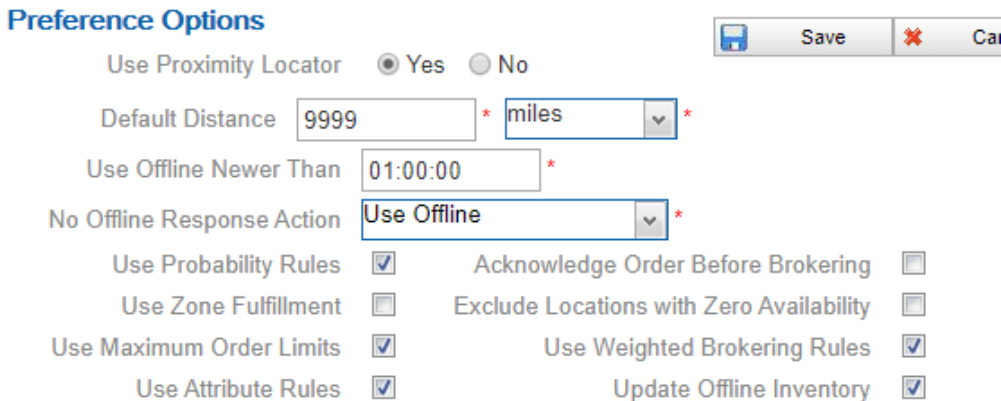
1. Select **Locations > Organizations and Preferences**.



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](#)). 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](#)).
 - Optionally, configure turn-by-turn distance calculation rather than straight-line distance calculation for delivery orders using a specified carrier. Turn-by-turn distance calculation is available only if you use Oracle Maps Cloud Service. In order to enable turn-by-turn distance calculation, the *Turn-by-Turn Distance URL* also needs to be specified at the Tenant- Admin screen.

The screenshot shows the 'Preference Options' configuration screen for 'Order Broker Settings'. The interface includes several sections with various settings:

- Use Proximity Locator:** Radio buttons for 'Yes' (selected) and 'No'.
- Default Distance:** Input field with '9999' and a dropdown menu set to 'miles'.
- Use Offline Newer Than:** Input field with '01:00:00'.
- No Offline Response Action:** Dropdown menu set to 'Use Offline'.
- Use Probability Rules:** Checked checkbox.
- Acknowledge Order Before Brokering:** Checked checkbox.
- Use Zone Fulfillment:** Unchecked checkbox.
- Exclude Locations with Zero Availability:** Unchecked checkbox.
- Use Maximum Order Limits:** Checked checkbox.
- Use Weighted Brokering Rules:** Unchecked checkbox.
- Use Attribute Rules:** Unchecked checkbox.
- Update Offline Inventory:** Checked checkbox.
- Shop Order When Proximity Unknown:** Unchecked checkbox.

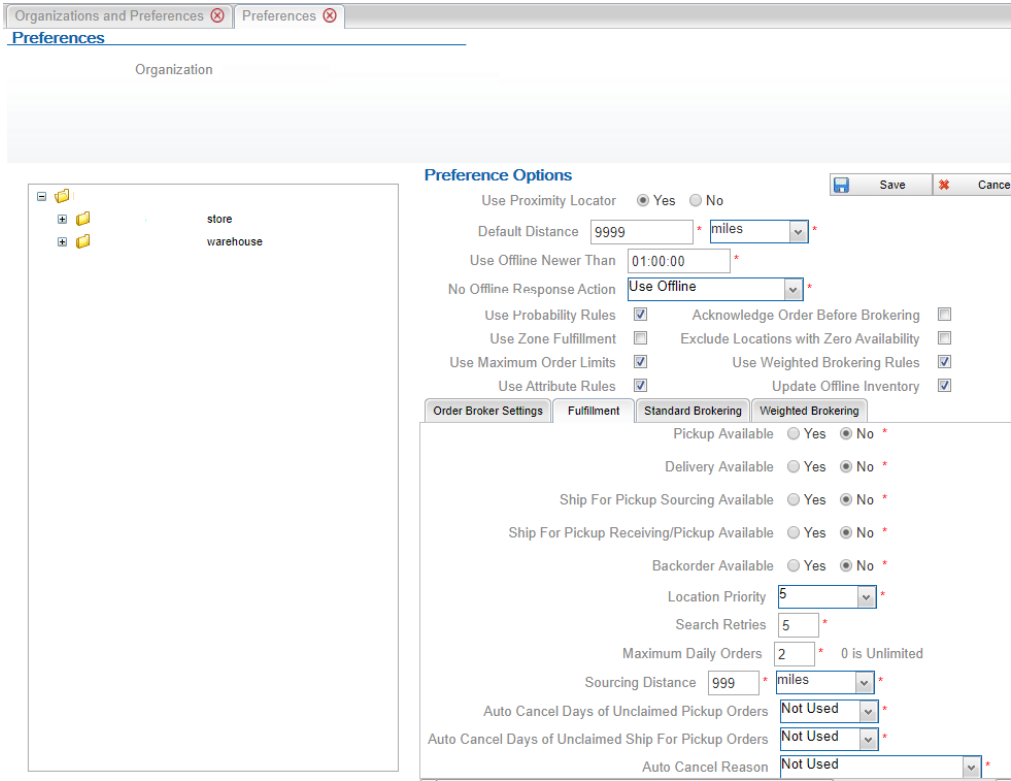
Below these are tabs for 'Order Broker Settings', 'Fulfillment', 'Standard Brokering', and 'Weighted Brokering'. The 'Order Broker Settings' tab is active and contains:

- Group Shipment Locations:** Unchecked checkbox.
- Allow Split Line:** Checked checkbox.
- Allow Split Order:** Checked checkbox.
- Allow Partial Updates:** Unchecked checkbox.
- Maximum No. Responses:** Input field with '9'.
- Default Unfulfillable Location:** Dropdown menu set to 'DEFAULT - Default Unfulfillab...'
- Default Carrier:** Dropdown menu set to 'DEFAULT - Default Carrier'
- Do Not Split Order For Carrier:** Dropdown menu set to 'Not Defined'
- Turn-by-Turn Distance Evaluation for Delivery Orders:** Section with a dropdown menu set to 'LOCAL - Turn-by-Turn Delivery'.
- Carrier for Turn-by-Turn Distance Evaluation:** Dropdown menu set to 'LOCAL - Turn-by-Turn Delivery'.
- Maximum Turn-by-Turn Distance:** Input field with '50' and a dropdown menu set to 'miles'.

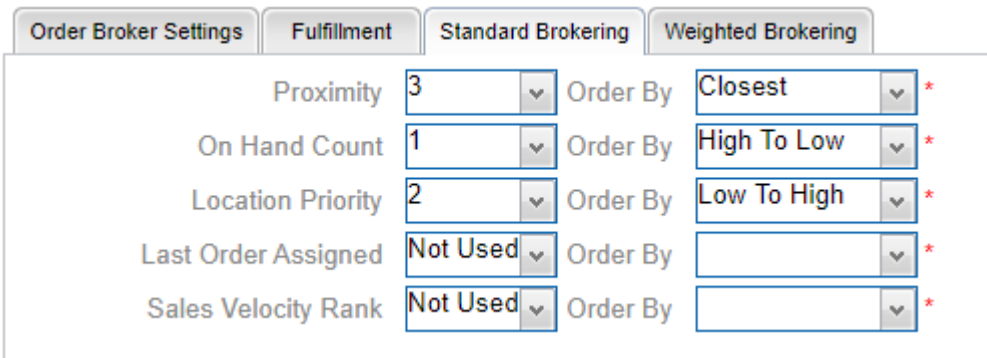
For more information: See the **Preferences** screen in the online help for information on the additional options available at this tab.

- 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.

Order Broker Settings	Fulfillment	Standard Brokering	Weighted Brokering
Maximum Order Splits		<input type="text" value="2"/> *	0 is Unlimited
Weighted Percentages			
Labor Cost		<input type="text" value="0"/> *	
Gross Margin		<input type="text" value="0"/> *	
Proximity		<input type="text" value="0"/> *	
On Hand Count		<input type="text" value="100"/> *	
Sales Velocity		<input type="text" value="0"/> *	Priority <input type="text" value="Largest To Smallest"/> *
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 in the online help for complete information on setting preferences.

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

Scheduling Jobs

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

- Data Hygiene:
 - Completed Order Private Data Purge
 - Daily Clean Up
- Exports:
 - Fulfilled Inventory Export
 - Inventory Quantity Export
 - Sales Order Data Extract
- Imports:
 - Identity Cloud User Synchronization
 - Incremental Inventory Import
 - Product Import

- Orders:
 - Auto Cancel Unclaimed Pickup Orders
 - Email Notifications

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

**Note:**

Do not attempt to schedule jobs before creating systems.

About Scheduling Imports

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

**Note:**

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

Import from default system first: 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: 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). See *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* in the online help for background on the import process.

**Important:**

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

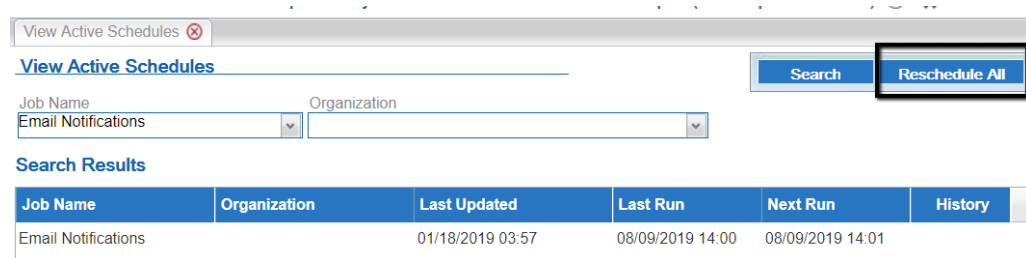
Mapping from integrating systems: Consult the integrating system's documentation and complete the **Schedule Jobs** screen for systems that support the import process, including Order Management System.

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

Restart All

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

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



View Active Schedules

View Active Schedules Search Reschedule All

Job Name Organization

Email Notifications

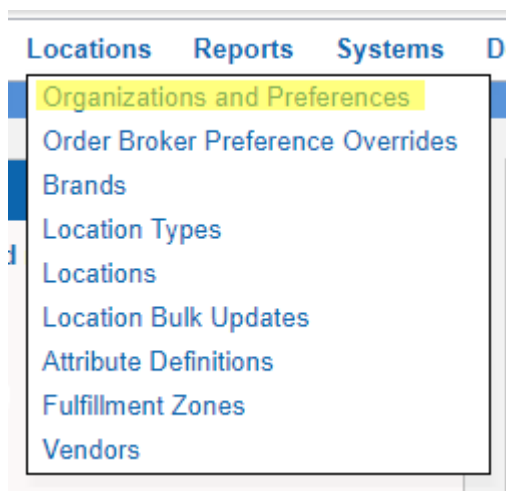
Search Results

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

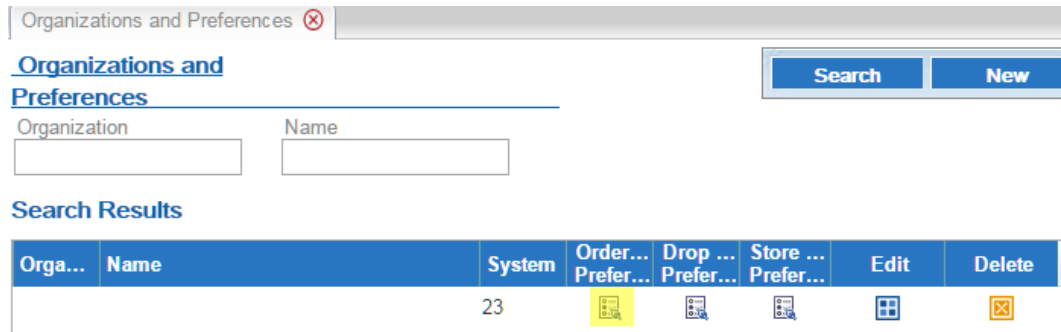
Adjust and Save Preferences

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

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



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

See the [Retail Omnichannel Web Service Authentication Configuration Guide on My Oracle Support](#) for web service configuration instructions.