

Oracle® Retail Order Broker Cloud Service

Release Readiness Guide



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ORACLE®

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Contents

1 Feature Summary

Modern View	1-2
Database Updates	1-7
Duplicate Order Request Email Notification	1-7
Store Associate Location Assignment	1-7
Assign Store Connect and Vendor Groups to Roles in IDCS/OCI IAM	1-8
Inbound SOAP Web Service Version can be no higher than 21.1	1-8
Retail Data Store Availability	1-9

2 Resolved Issues

Routing Engine	2-1
Store Connect	2-1
Supplier Direct Fulfillment	2-1
User Interface	2-2
Imports and Exports	2-2
System Processing	2-2
Reports	2-3

3 Browser Requirements and Compatibility

4 Deprecation Advisory

Preface

Oracle Retail Order Broker Cloud Service includes the following modules:

- **Routing Engine:** Distributed order broker that determines inventory availability across the enterprise, and uses advanced business rules to select locations that can fulfill orders.
- **Supplier Direct Fulfillment:** Web-based vendor portal enabling vendors to share purchase orders and shipping information to simplify drop shipment.
- **Store Connect:** Web portal that enables store associates to process and fulfill omni-channel orders.

Overview

This guide outlines the information you need to know about Order Broker Cloud Service 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.

We welcome your comments and suggestions to improve the content. Please send us your feedback at retail-doc_us@oracle.com.

Audience

This document is intended for the users and administrators of the Oracle Retail Order Broker Cloud Service.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

Customer Support

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

<https://support.oracle.com>

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>.

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 Order Broker 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

The enhancements below are included in this update.



Note:

When you upgrade to Order Broker 21.0+, ship-for-pickup orders are automatically enabled for all organizations.

Column Definitions

Small Scale: These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.

Larger Scale: These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.

Customer Action Required: Indicates if you must take action before these features can be used. These features are delivered disabled and you choose if and when to enable them.

Feature	Scale	Customer Action Required
User Interface Enhancements		
Modern View	larger	None
System Management Enhancements		
Database Updates	smaller	None
Assign Store Connect and Vendor Groups to Roles in IDCS/OCI IAM	smaller	None
Duplicate Order Request Email Notification	smaller	Optionally, add email addresses to the <i>Administrative Email</i> defined at the Event Logging screen
Inbound SOAP Web Service Version can be no higher than 21.1	smaller	Make sure message version specified for XML requests is not higher than 21.1

Feature	Scale	Customer Action Required
Retail Data Store (RDS) Availability Web Service Enhancements	larger	Subscribe to Retail Data Store
Store Associate Location Assignment	larger	Optionally, use the new web service.

Modern View

With this update, Order Broker has introduced the Modern View user interface built using Oracle JET technology and the Oracle Redwood styling. Oracle Redwood is our new user interface standard, focused on being predictive, and empowering the user with the information that they need in a quick and intuitive way. This is our next-generation user experience, including new colors, backgrounds, iconography, and forms. The term Classic View refers to the preexisting Order Broker Cloud Service interface.

Select screens for maintaining foundation data are now available in a new Modern View format instead of the existing Order Broker format. The screens available in Modern View enable you to create, review, update, or delete brands, carriers, boxes, and reason codes.

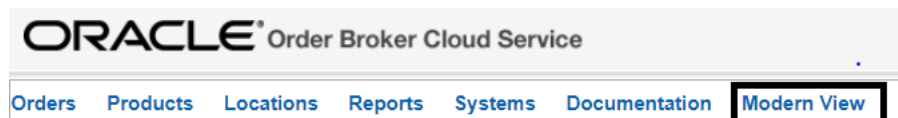


Note:

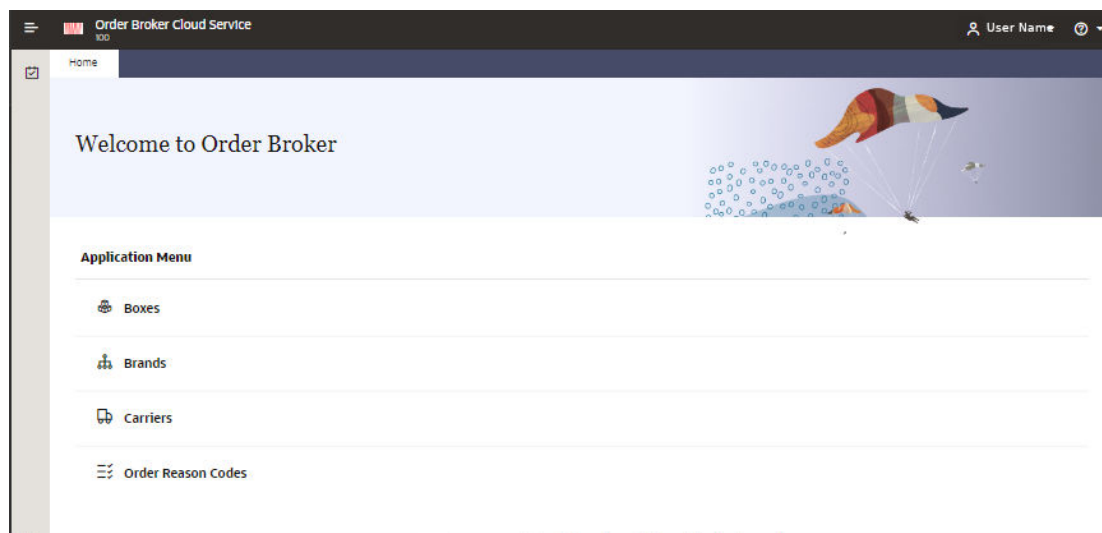
Membership to the OBCS_Admin or OBCS_User role is required in IDCS or OCI IAM for access to Modern View. Application roles are granted separately for each environment, so membership must be granted to each as appropriate. Oracle recommends that you review all existing user profiles and make sure that they have the appropriate role assigned.

Advancing to Modern View

A new **Modern View** option, enabling you to advance to Modern View, is available to the right of the **Documentation** drop-down at the top of the Classic View screen.



If you have any Classic View screens open when you select this option, a message indicates that any unsaved changes will be lost. The Modern View home screen opens.



Language: When you advance to Modern View, the current language applies. The language is determined by the code appended to the URL; for example, a suffix of `?locale=it_IT` indicates to use Italian. If you switch to a different language while in Modern View by changing the suffix to the URL, the newly selected language for your current session is retained when you return to Classic View. See the *Frequently Asked Questions* in the Order Broker online help for a list of supported languages.

Screens now in Modern View: The screens that are now available in Modern View, and no longer available in Classic View, are:

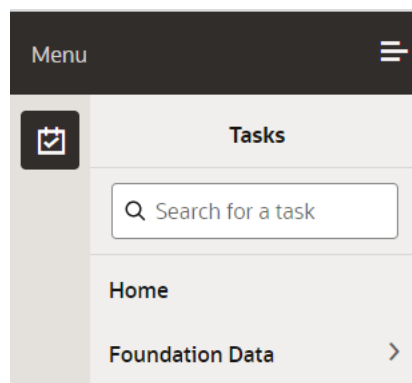
- Boxes. Note that with this update, if more than one record is defined as the Default in Store Connect and/or the Default in Vendor Portal, the oldest record is automatically selected as the default.
- Brands. Note that with this update:
 - The pick slip form and pick slip batch pull sheet form fields are no longer displayed on the screen, as they cannot be customized.
 - The email address fields now support up to 2500 positions for the entry of multiple email addresses.
- Carriers. Note that with this update:
 - Any carriers that are flagged as Active are assigned to vendors by default, without a prompt.
 - Carriers cannot be deleted.
 - The length of the carrier code should be limited to support integrated systems. For example, Order Management System supports a two-position, numeric ship via code.
- Order Reason Codes: Use this screen to work with cancel or reject reason codes. Note that, with this update, reason codes cannot be deleted.

Although these options are still displayed in the Classic View home page and in the drop-down menus, an error message is displayed if you attempt to select any of them.

As in Classic View, authority to each of these options is required through the Role Wizard. If the user does not have authority to an option, the Modern View home page does not display it. Note that with this update, the Reason Codes role authority has been renamed to Order Reason Codes.

Menu and Tasks

Menu: In addition to selecting an option from the Modern View home screen, you can also expand the menu by expanding the icon in the upper left, and then use the menu options to advance to a specific option.

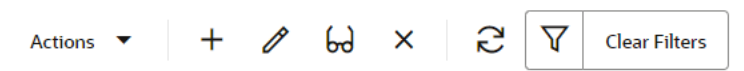


Select the Tasks icon (displayed below the word “Menu” in the above illustration) to expand the Tasks menu as illustrated above.

You can advance to a menu option by searching for it, or by selecting it from the Foundation Data menu. You can also return to the home screen from another screen by selecting **Home**.

Standard Options for Working with Foundation Data

At each of the above-listed screens, a standard set of options is displayed. Note that the availability of options will vary depending on the type of data, existing records, and whether a particular record is selected.



Each option is available by selecting it from the Actions pull-down menu, or by clicking the related icon, as displayed above.

Standard options: The options available from the **Actions** menu as well as by clicking the related icon are:

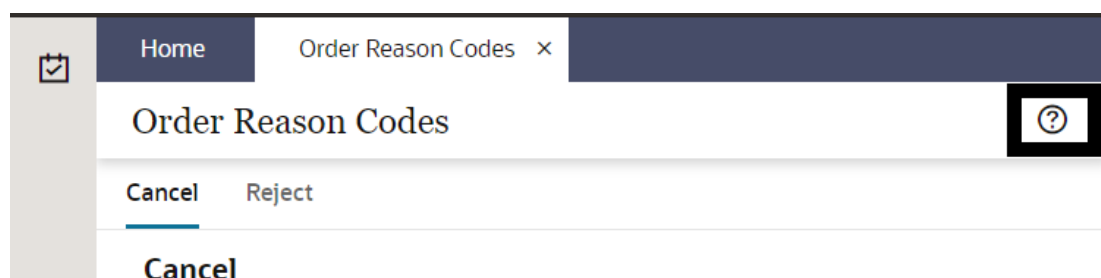
- Add a new record (+)
- Edit a record ()
- View a record ()
- Delete a record (X)

Filter records: You can filter the displayed records through a full or partial entry in one of the Filter fields above the displayed records. When you tab out of the filter field, the displayed list of records is restricted to those that match your entry. Optionally, select **Clear Filters** to remove the filters and display all records for the organization.

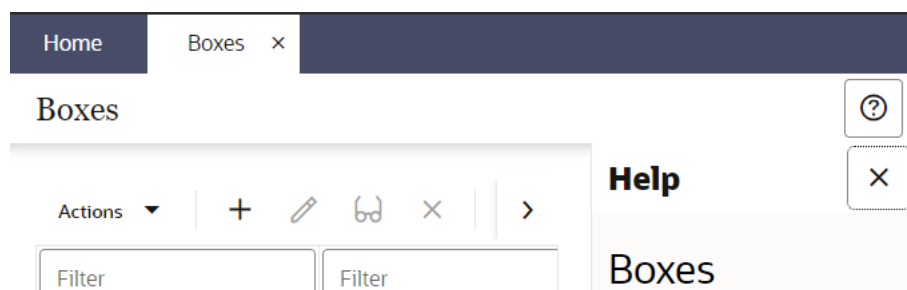
Refresh displayed records: You can use the refresh option () to update the displayed records.

Online Help

Screen-specific help: For each of the above screens, a screen-specific help option is available by clicking the help icon in the right of the screen title bar. The help panel slides open to the right.



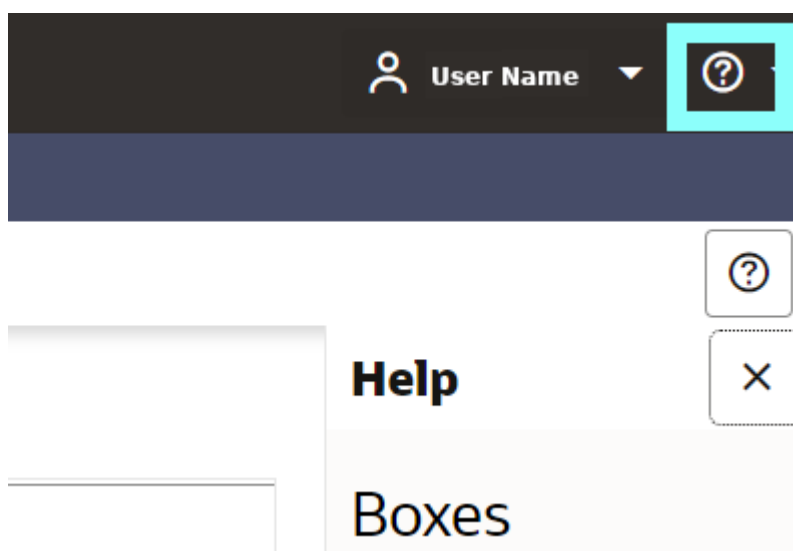
The help topic then opens in a panel to the right of screen.



You can close the help panel by selecting the **X**.

Entire help set: The entire Order Broker help contents, including both Modern View and Classic View screens and overviews, are available in two ways:

- By clicking the help icon in the upper right corner of the screen, next to your user name.

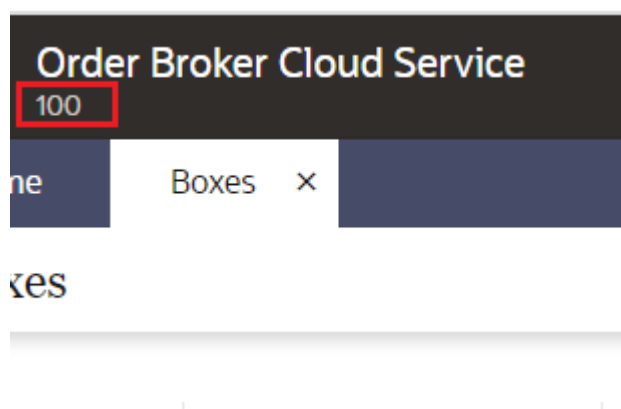


- Clicking the Help icon at the bottom of a screen-specific help topic ( Help) opens the entire help set with the current help topic displayed.

Additional documentation, including links to the Store Connect help, the Vendor Portal help, and the Operations Guide, are available from Classic View.

Additional Navigation Options

Multiple organizations? If you have multiple organizations defined in Order Broker, the information that is initially displayed and updated in Modern View is from the first organization, alphanumerically, in your environment. For example, if you have an organization 100 and an organization 200, organization 100 is selected when you first advance to Modern View. If you have organizations ABC and XYZ, organization ABC is selected when you first advance to Modern View. You can change the current organization by clicking the organization description, displayed to the right of the Oracle logo and below Order Broker Cloud Service in the title bar, and then selecting an organization from the list. Any options that are open close automatically when you change organizations.



Returning to Classic View: From Modern View, select the **Classic View** option, available by selecting the down arrow next to your user name, as illustrated above.

Again, a message indicates that any unsaved changes will be lost if you have any screens open in Modern View.

About Order Broker Cloud Service: Select this option below the help icon in the upper right corner of the screen, next to your user name, to switch to the About Order Broker Cloud Service page. This page displays the:

- *Version:* The current version of Order Broker, including the release number and hot fix number, for example: 22.2.301.2, where 22.2.301 is the release number and 2 is the hot fix number.
- *Application Level:* The current build number applied to the Order Broker server for Modern View, including the release number, hot fix number, build number, and date stamp, for example: 22.2.301.1–2022-07-02-12-13-14-PM, where 22.2.301 is the release number, 1 is the hot fix number, and the date and time are July 2, 2022 at 12:13:14.
- *Service Level:* The current version of the Order Broker services, including the release number and build date stamp, for example: 22.2.301.1-20220627121314, where 22.2.301 is the release number, 1 is the hot fix number, and the date and time are June 27, 2022 at 12:13:14.

You can select **Done** at the lower right or the **X** at the upper right to return to the previous screen.

Timeout and Logoff

When you log out of Modern View, you advance to the same Logout screen as if you logged out from Classic View. Select the Logout option, available by selecting the down arrow next to your user name. Again, a message indicates that any unsaved changes will be lost if you have any screens open in Modern View.

The screen will advance to the Inactivity Timeout screen if there has been no activity in Modern View during the number of minutes specified in the UI Timeout field at the Tenant-Admin screen. Additionally, three minutes before the user's session is due to time out, an Inactivity Timeout window opens, indicating the number of seconds before the session will time out, and provides the option to log out or extend the session. If the session is not extended, the screen will advance to the Inactivity Timeout screen.

Database Updates

The Data Model includes changes related to this update of Order Broker Cloud Service. The current Data Model is available on My Oracle Support (2832105.1).

Duplicate Order Request Email Notification

When a duplicate order request is received, Order Broker now generates an email alert to the *Administrative Email* addresses defined at the **Event Logging** screen. This email provides information about the duplicate email request, including the date and time; duplicate order number, line number, and request ID; the system and location submitting the duplicate order; and the order type.

Store Associate Location Assignment

To streamline store associate configuration, a new web service enables you to:

- Assign one or more locations to store associates
- Update location assignments for store associates
- Delete location assignments for store associates
- Retrieve a list of the locations assigned to store associates
- Update the setting of the *Active* flag for store associates

The new web service uses the Admin web service authentication. OAuth is required.

**Note:**

Oracle recommends that you do not send more than 10,000 store associate location assignment updates in a single message.

Assign Store Connect and Vendor Groups to Roles in IDCS/OCI IAM

With this update, when the Identity Cloud User Synchronization job creates a new group for a Store Connect system or a Vendor, it will automatically add it to the appropriate application role in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). Previously this step was required to be done manually.

- When a new Store Connect System is created, Order Broker will send a request to create the group and then a follow up request to add the group to the `OBCS_Store_User` role in IDCS or OCI IAM.
- When a new Vendor is created, Order Broker will send a request to create the group and then a follow up request to add the group to the `OBCS_Vendor_User` role in IDCS or OCI IAM.

Inbound SOAP Web Service Version can be no higher than 21.1

With this update, the version tag of each inbound SOAP web service request message should be set to no higher than 21.1. The message version number will no longer be tied to the Order Broker application version number.

**Important:**

The version tag must include a decimal; for example, 21.0 is valid, but 21 is invalid.

Retail Data Store Availability

Oracle Retail Data Store (RDS) enables retailers to unlock the value of their data through a comprehensive set of tools, enabling virtually unlimited extensibility while abstracting those workloads from those of the original Oracle Retail cloud services. This toolset allows the retailer to create a wide variety of functionality that they can tailor specifically to their own business processes. Examples include custom web services to expose specific data elements, custom integration (inbound and outbound), reporting and analytics, and custom user interfaces for the capture of retailer-specific data.

The Retail Data Store provides a low-cost, low-code environment that enables you to extend the capabilities of Order Broker. See <https://www.oracle.com/a/ocom/docs/industries/retail/retail-data-store-ds.pdf> for background.

A separate subscription different from Order Broker Cloud Service is required for Retail Data Store, which is composed of two parts:

- Oracle Retail Data Compute Cloud Service – this portion of the subscription covers compute resources available to the cloud service and allows a retailer to add compute to their solution as necessary for their extensions.
- Oracle Retail Data Storage Cloud Service – this portion of the subscription covers data storage resources available to the cloud service and allows a retailer to add storage to their solution as necessary for these extensions.

For more information about Retail Data Store, see its documentation set on the Oracle Help Center (<https://docs.oracle.com/en/industries/retail/>). Also, see the Order Broker Retail Data Store (RDS) Data Model on My Oracle Support (2832105.1).

2

Resolved Issues

This section contains a list of the customer-reported bugs that were fixed in this release.

Routing Engine

Bug ID/ Issue #	Description
34064129	Corrected the Location indicated in Order History when an order is automatically canceled because the customer failed to pick it up to be the pickup location rather than the originating location.
34152315	Corrected an error that was logged for a StatusUpdate request if the status_date passed was blank.

Store Connect

Bug ID	Description
33744650	Changed the calculation of Order Age Hours to highlight orders whose age meets the defined number of hours rather than when the age exceeds the number of hours.
33788905	Enhanced the performance of loading orders after a search at order list screens when there is a large number of orders.
33906189	Corrected the Standard Shipping Service request to populate the recipient address information properly when the order contains multiple lines with different recipient addresses.
33946478	Corrected the Store Associate User Profiles screen in Order Broker to display a message indicating to refine search criteria if there are more than 50 records to display.
33969804	Corrected calculation of the order age to prevent flagging orders in red when the number of <i>Order Age Hours</i> is set to 0 for an organization.
34068935	Corrected the sort of history records at the Order History screen. The lines are now sorted by date.
34131649	Changed the Ready to Pickup screen to enable you to enter today's date at the Change Order Pick Up Date window.

Supplier Direct Fulfillment

Bug/Issue ID	Description
33825918	Prevented logging an unnecessary error during vendor creation.
33906612	Changed the Invoice Upload screen in the Vendor Portal to sort by date and time of the upload.
34156405	Corrected a situation in which the Select Batch window from the Integrated Shipping screen did not display any batches. This situation occurred if the vendor put a line on hold, generated the pack slip, and then removed the hold from the line.

Bug/Issue ID	Description
34160531	Corrected the Purchase Order Detail Line window to apply changes correctly and close after you select Save.
34146525	Corrected an issue that could have potentially caused carrier assignments to vendors to fail, or prevented correct setDSShipConfirm validation.
34156460	Corrected the Integrated Shipping screen to display all purchase order lines that are eligible for shipment.
34206047	Corrected purchase order creation through the CreatedSOrder request to create the purchase order regardless of whether there is also an existing sales order with the same sales order number.
34229091	Corrected the display of carrier for a selected carrier at the Purchase Order Shipping screen when the purchase order was eligible to ship by line.
34233583	Corrected the vendor portal online help to describe the current function of the Get Purchase Orders screen which is available only to generate the pack slip if the vendor integration is enabled. Previously, the online help indicated that the screen was not implemented.
34247121	Corrected the Get Purchase Orders screen to allow select by Single Item or Single PO.
34247268	Corrected the Get Purchase Orders screen to allow search when Single Item is selected.

User Interface

Bug ID or Reference	Description
11478	Clarified the messaging on the Store Connect screens when a user logs out versus is logged out due to an inactivity timeout.
11988	Changed localization to no longer require clearing your browser cache in order to switch to a different language when you log out and then log back in.
33726698	Corrected an issue that prevented the Retry option to allow a store associate to log into Store Connect after the first login attempt failed. This issue occurred if the login had failed because the associate was not assigned to a Store Connect system in IDCS or OCI IAM during the first login attempt, but then the associate's assignment was corrected, and the associate was assigned to one or more store locations.
34092085	Restored the <i>Associate UI Timeout</i> field to the Settings tab of the Store Connect Preferences screen. This field had been mistakenly removed in update 21.1.
34118697	Corrected the Probable Quantity Location screen to enable you to assign a rule.

Imports and Exports

Bug ID	Description
34026822	Enhanced proximity upload processing to open a window indicating the success or failure of the upload. Additional details are logged, including a message indicating if a row in the file does not have all the required values. If the upload file contains both valid and invalid rows, the valid rows are processed, and the status of the upload is set to Completed with Errors.

System Processing

Bug ID/ Change ID	Description
11688	Corrected the Probable Quantity Extract to check the PQE Startup Threads setting in the Tenant-Admin screen each time the job starts.
11722	All PQE_RECALCULATION_SERVER records that are older than 1 week are now deleted during server startup as these are no longer needed and can cause performance issues.
11736	Enhanced logging for exceptions.
33645841	Upon startup, the Identity Cloud User Synchronization job will be run immediately when the IDCS URL has been changed on the Tenant-Admin screen. Additional logging has also been added.
34164979	Removed the <i>Domains</i> feature from the Role Wizard, since Domains are no longer supported.
34176758	Removed unnecessary detail from the log entries indicating a duplication purchase order number was passed in the CreatedSOrder message.
34237628	Changed the Identity Cloud User Synchronization job to continue processing if there is an invalid Store Connect system for an organization. It now logs the error and continues processing for the next organization.

Reports

Bug ID/ Issue ID	Description
34065964	Reformatted the Vendor Aging Detail report to correct data that was truncated on the report.

3

Browser Requirements and Compatibility

The vendor portal, Store Connect, and the Order Broker administration screens support the current versions of the following browsers:

- Chrome (desktop)
- Microsoft Edge
- Firefox

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.



Note:

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

Supported Oracle Products

Application	Latest Supported Version
Oracle Retail Xstore Point of Service	21.0+
Oracle Retail Order Management System Cloud Service (OROMS)	21.2+
Oracle Retail Integration Cloud Service (RICS)	22.1.302.0+
Oracle Retail Omnichannel Cloud Data Service (OCDS)	19.1+
Oracle Retail Store Inventory Management Cloud Service (EICS)	22.1.301.0+
Oracle Retail Merchandising Foundation Cloud Service (RMFCS)	22.1.301.0+
Oracle Maps Cloud Service	not versioned (Oracle SaaS solution)
Oracle Retail Data Store (RDS)	22.1.301.0

4

Deprecation Advisory

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.

Scheduled Deprecated Features Removed

For more information about deprecated functionality in this product, see the following document on My Oracle Support: Oracle Retail Order Broker Cloud Service Deprecation Advisory ([2670295.1](#)).