Oracle® Retail Order Broker Cloud Service

Order Broker Cloud Service Online Help

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Preface

Audience

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Related Documents

For more information, see the following documents in the Order Broker Cloud Service Release 23.1.101.0 documentation set:

- *Order Broker Cloud Service Release Readiness Guide*
- *Order Broker Cloud Service Operations Guide*
- *Order Broker Cloud Service Modern View Online Help*
- *Order Broker Cloud Service Vendor Portal Online Help*
- *Order Broker Cloud Service Vendor Integration Guide*
- *Order Broker Cloud Service Store Connect Online Help*
- *Order Broker Cloud Service Administration Guide*

See the Order Broker Cloud Service 23.1.101.0 documentation library at the following URL:

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

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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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Conventions

The following text conventions are used in this document:

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.
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

Order Broker Routing Engine Overview

Overview: Order Broker provides a gateway to inventory availability across all sales channels. When used with a call center, store point-of-service, ecommerce, or other customer-facing application, Order Broker enables you to offer your customers multiple purchasing options, such as store pickup. You can use Order Broker's Routing Engine module to automatically select the best location to fulfill customer orders across the enterprise, and to track customer orders from creation through fulfillment. In addition, with Order Broker's statistical data, you can optimize inventory disbursement to ensure appropriate stock levels in each salable location.

About Supplier Direct Fulfillment: See the *Supplier Direct Fulfillment Overview*.

About Store Connect: See the *Store Connect Overview*.

In this topic:

The Routing Engine

Overview: Use Order Broker's Routing Engine module to:

- determine whether products are available across the enterprise
- select the best location to source an order or line, either automatically based on criteria that you set for the enterprise, or by providing a list of possible locations
- help the customer select a location where s/he can pick up an order
- create orders across the enterprise
- notify locations about assigned orders
- track order or line status

In this topic:

Types of Orders

The types of orders that the Routing Engine supports are described briefly below.

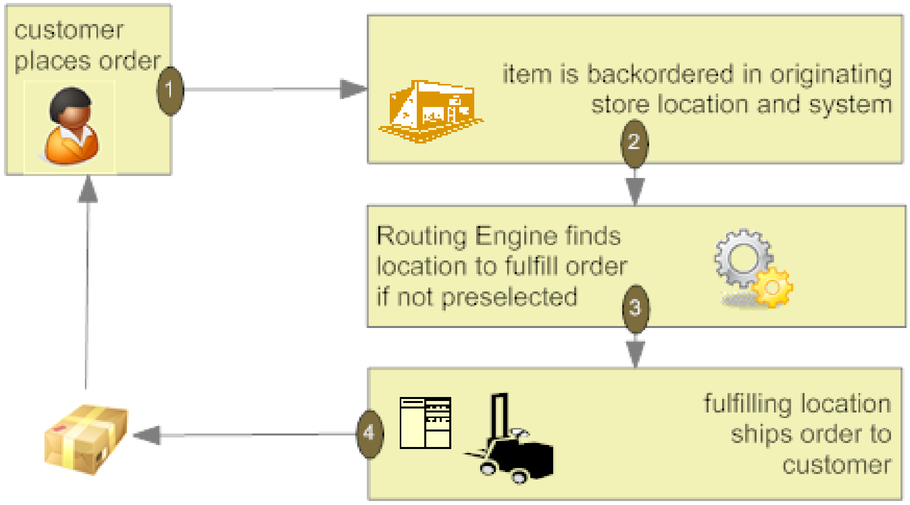
> **Important:**
>
> When you create a new organization in Order Broker 20.0 or higher, ship for pickup orders are automatically enabled, and in this case retail pickup and ship-to-store orders are not supported. When you update to Order Broker 21.0 or higher, ship for pickup orders are automatically enabled in all existing orders, and in this case retail pickup and ship-to-store orders are converted to ship-for-pickup orders.

For more information: See *About Ship-for-Pickup Orders* for background.

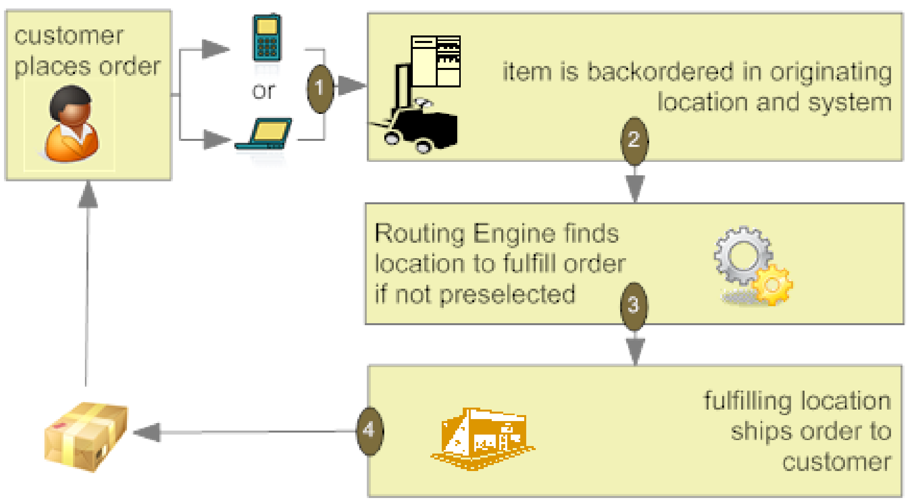
Delivery Order

The Routing Engine can select a location to ship an order to the customer, or staff can designate a location. You would typically use this option to ship an order even though the desired products are backordered in the originating location.

Example 1: The customer wants to buy a product from a retail location, but the product is out of stock. The location submits the order to the Routing Engine, specifying that the order be shipped directly to the customer from a nearby distribution center.



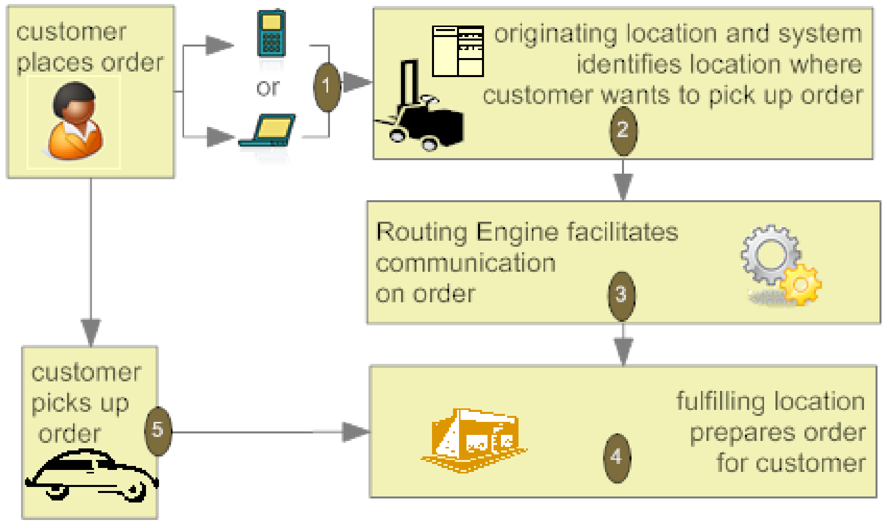
Example 2: The customer orders a product on the web storefront. Since the product is currently backordered in the warehouse, the order management system submits the order to Order Broker for fulfillment. The Routing Engine automatically selects a location to fulfill the order, and the selected location ships the product directly to the customer.



Pickup Order

A location submits a pickup order to the Routing Engine when the customer has already selected a location where s/he would like to pick the order up and where the inventory is available. You would typically use this option to enable the customer to pick up the order at a nearby store that already has the inventory on-hand rather than wait for shipment.

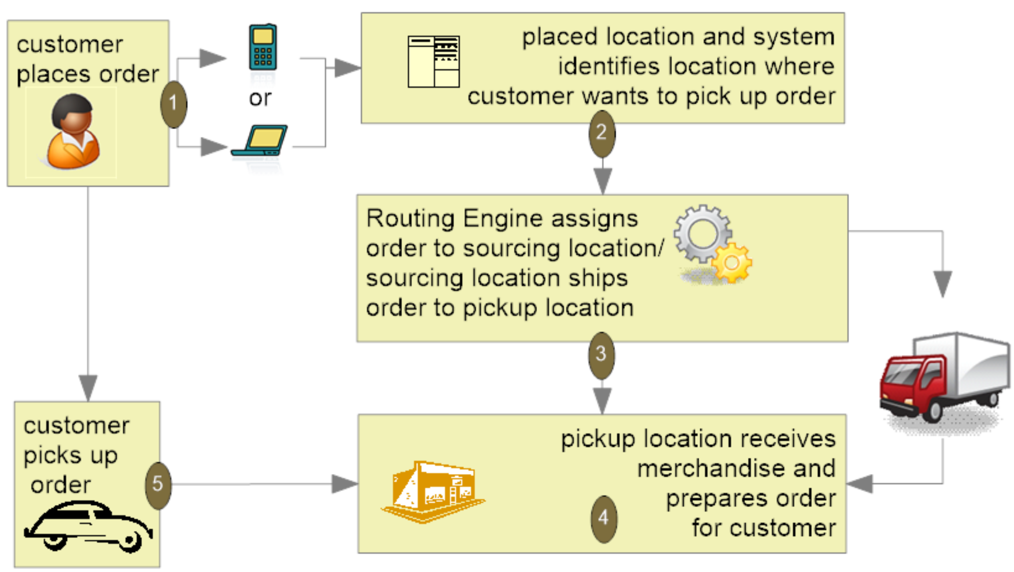
Example: The customer contacts the call center to see if a product can ship from the warehouse. Since the product is currently backordered in the warehouse, the CSR helps the customer select a nearby store where the product is currently in stock, so the customer can pick it up there.



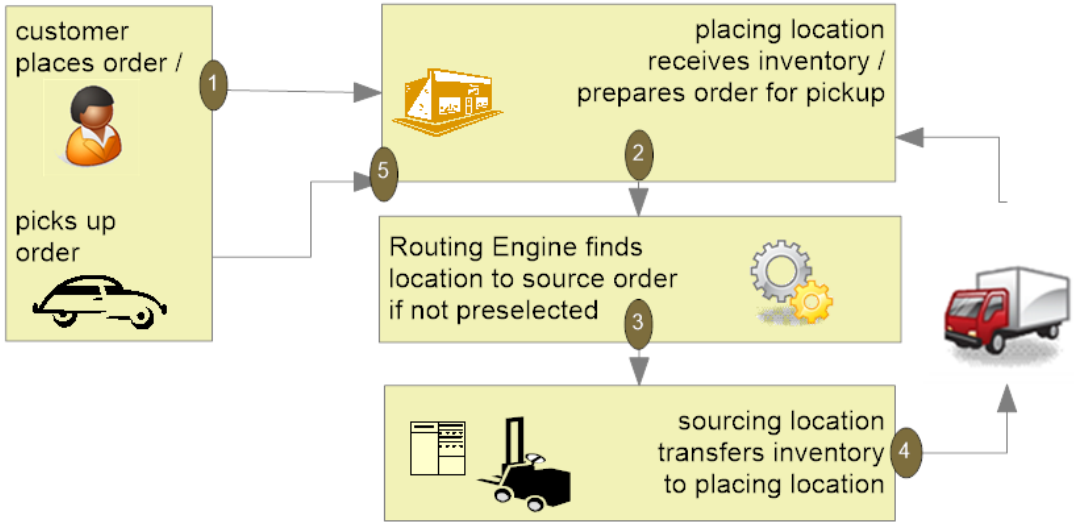
Ship For Pickup Order

A ship-for-pickup order is one that the customer picks up at a designated location, and that can have a separate placing, sourcing, and pickup location, although any two of these locations can be the same.

Example 1 (three different locations): The customer places an order on the web site (location A) and wants to pick the order up at location B. The Routing Engine “shops” the order and selects location C as the sourcing location. Location C ships the inventory to location B, where the customer can pick it up.

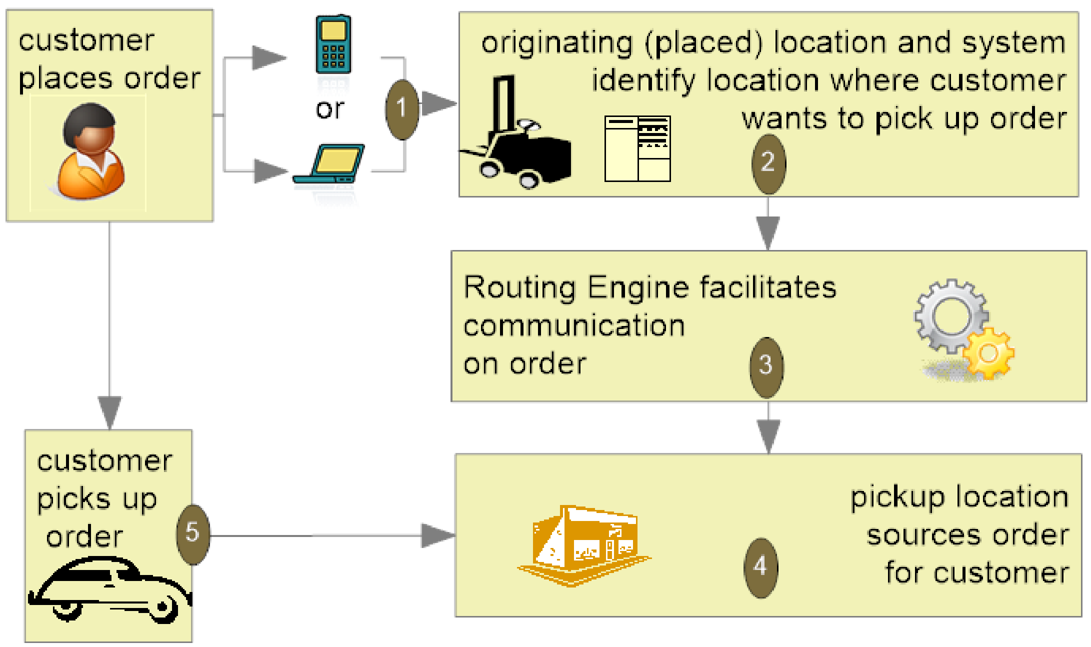


Example 2 (placed location and pickup location are the same): The customer places an order at location A and also wants to pick the order up at location A. The Routing Engine “shops” the order and selects location B as the sourcing location. Location B ships the inventory to location A, where the customer can pick it up.

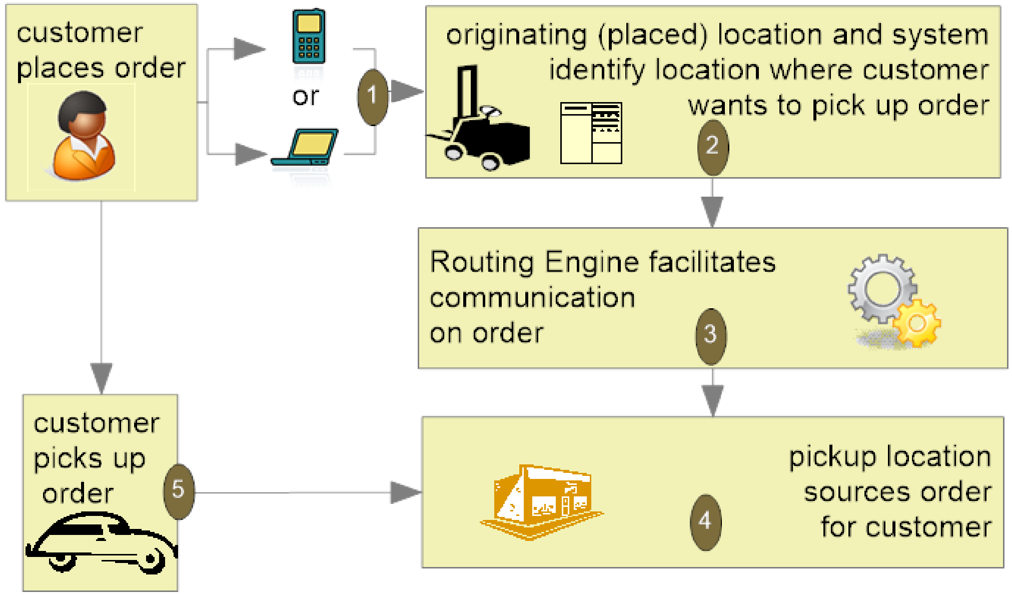


Example 3 (sourced location and pickup location are the same): The customer places an order by phone (location A) and wants to pick the order up at location B. When the order is submitted to the Routing Engine, the requested item is available at location B, so it is selected as the sourcing location. Once the order is ready at location B, the customer picks it up.

This order flow resembles the pickup order.



Example 4 (placed location and sourced location are the same): The customer places an order by phone (location A) and wants to pick the order up at location B. The distribution center has the inventory available, and ships it to location B. Once the order is ready at location B, the customer picks it up.



The pickup location for a ship-for-pickup order must be specified in advance, and cannot be changed. The sourcing location can also be specified in advance, or the Routing Engine can select the sourcing location. If the selected sourcing location cannot source the order, then the order can be "reshopped" so that another sourcing location is assigned.

Summary of Order Types

The different types of orders are summarized below.

> **Important:**
>
> When you create a new organization in Order Broker 20.0 or higher, ship for pickup orders are automatically enabled, and in this case retail pickup and ship-to-store orders are not supported. When you update to Order Broker 21.0 or higher, ship for pickup orders are automatically enabled in all existing orders, and in this case retail pickup and ship-to-store orders are converted to ship-for-pickup orders.

For more information: See *About Ship-for-Pickup Orders* for background.

Purpose	Delivery	Pickup	Ship for Pickup
used to:	ship an order to the customer when the inventory is backordered in the originating location	enable the customer to pick up the order at a nearby store that already has the inventory on-hand rather than wait for shipment	enable the customer to pick up the order at a nearby store, and source the inventory from the placing location, the pickup location, or a different location

Purpose	Delivery	Pickup	Ship for Pickup
originating location is where the order is:	placed	placed	placed, and possibly where it's sourced or picked up
fulfilling location is where the order is:	shipped from	picked up	N/A; sourcing location and pickup location can be different
fulfilling location selected how?	Routing Engine, or designated by the originating location; can be restricted through *zone fulfillment*	customer	sourced: Routing Engine, or designated by placing location pickup: designated by the customer
order shipped to:	customer	N/A	pickup location, if different from sourcing location

Selecting the Location for a Pickup Order (LocateItems)

Purpose: The submit order message for a pickup order needs to specify the fulfilling location and system. You can use the locate items message to request a listing of locations that should be able to fulfill an order for one or more products in a specified area.

Which locations have a product available for pickup? A pickup order means that the customer will pick up the product(s) in a location where the inventory is available, and it does not need to be transferred from a different location. If the request message indicates that the fulfillment type is a pickup:

- The response message lists each location where the product is stocked, is flagged as Pickup Available, and has a quantity available that meets or exceeds the quantity specified in the request message; also, the response provides information such as the available quantity and the date and quantity of the next expected purchase order. If the customer requests more than one item, the response message lists locations where all requested items are available for pickup.
- Once the customer specifies the location where s/he would like to pick up the product(s), you can then send the SubmitOrder request message, providing the customer information, requested products, and selected location.

> **Note:**
>
> Optionally, the request message can specify a *requested location* if the customer has a preferred store and wants to check on availability in that store only.

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.

Example:

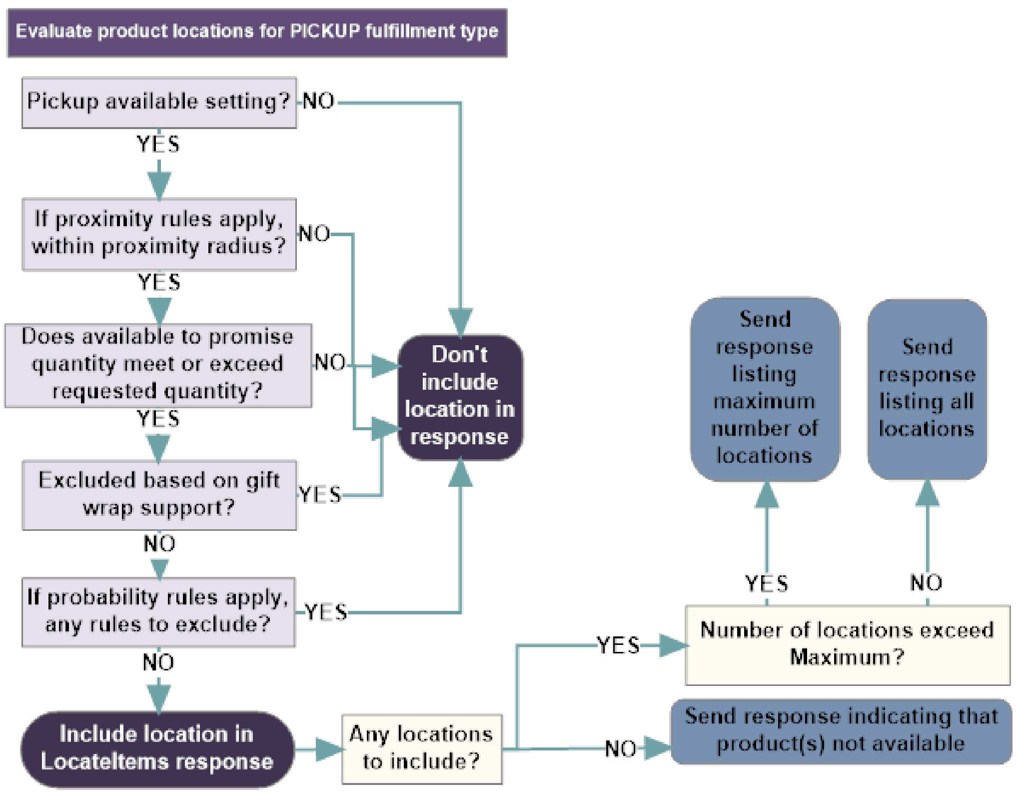
A customer wants to pick up an item at a nearby store. The LocateItems request indicates:

- the item (AB100 in a quantity of 5)
- the postal code where the customer is located (01581)
- the distance (in miles or kilometers) that the customer is willing to travel (15 miles)

The LocateItems response lists:

- store location 23: 10.72 miles from the customer
- store location 57: 13.51 miles from the customer

The response also includes the available quantity in each location, information on any open purchase orders, and the store's address.



Cannot split: Pickup orders cannot be split across multiple fulfilling locations. To split a pickup order, the originating system needs to submit the request for each location as a separate order.

Exclude Locations with Zero Available? If the Exclude Locations with Zero Availability setting at the *Preferences* screen is selected, any possible product locations whose current available to promise quantities are 0 or less are excluded from consideration before the application of any potential probability rules.

Gift wrap? If the `gift_wrap` tag in the request is set to Y and the *Use Attribute Rules* flag is selected at the **Preferences** screen, only locations that are flagged to support gift wrap are eligible for the pickup order.

Locate Items Sort Order, Pickup Request

If Use Weighted Brokering Rules is selected at the **Preferences** screen, the locations are listed in proximity sequence.

If Use Weighted Brokering Rules is not selected (Standard Brokering), the locations returned in the response are sorted based on the same Order Broker criteria that apply to delivery orders unless you use the **Order Broker Preference Overrides** screens to set up preference overrides. Otherwise, the organization-level settings apply to all systems and order types, and the number of eligible locations exceeds the Maximum No. Responses, it is possible that the store location closest to the customer might not be included in the search results, even if it has the requested item(s) available.

Example: On Hand Count is the first criterion under the *Order Broker Settings* at the **Preferences** screen, and the Maximum No. Responses is set to 5.

The available quantity of the requested item in each eligible location is:

1. 100 in location A, 20 miles away
2. 90 in location B, 25 miles away
3. 80 in location C, 19 miles away
4. 70 in location D, 15 miles away
5. 60 in location E, 10 miles away
6. 50 in location F, 5 miles away

Because location F is the sixth location, it is not included in the search results, even though it is the closest to the customer's address.

However, if you use the **Order Broker Preference Overrides** screen to set up an override for the system to sort first on proximity when the order type is Pickup, then location F is returned first in the search results.

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.

Selecting a Location for a Delivery Order

Overview: You can have the Routing Engine select the fulfilling location for a delivery order.

Splitting orders or lines? The Allow Split Order preference controls whether it is possible to split a delivery order across multiple fulfilling locations, If this preference is selected, the Routing Engine splits orders if needed to fulfill the order, and the submit order message can specify multiple fulfilling locations for an order. If the Allow Split Line preference is also selected, the Routing Engine splits the quantity of a single order line across multiple fulfilling locations if necessary.

Weighted or standard brokering? The Use Weighted Brokering Rules setting at the **Preferences** screen controls how the Routing Engine "shops" for fulfilling locations:

- **Standard brokering:** If Use Weighted Brokering Rules is *not* selected, the Routing Engine selects fulfilling locations based on the Standard Brokering criteria, including proximity, on-hand count, location priority, last order assigned, and sales velocity rank.
- **Weighted brokering:** If Use Weighted Brokering Rules is selected, the Routing Engine filters the list of eligible fulfilling locations for an order and submits the list, along with information on the order line(s) and configuration data, such as weighted brokering settings, to the Science Engine module for brokering. The Science Engine evaluates the data and either assigns the fulfilling location(s) or returns a reason code indicating why the order or line(s) could not be fulfilled.
- Weighted brokering is used to select fulfilling locations for the Submit Order message, Product Availability message, and "reshopping" an order or line; however, it is not used

for the Locate Items message. Locations in the Locate Items response are listed in order of proximity, and do not reflect any Science Engine calculations.

You can use weighted brokering to select fulfilling locations that are more profitable. For example, you can give preference to locations that have a lower labor cost or to product locations where the in-store margin (selling price - cost) is lower than the margin for an online sale.

The use of each method to select fulfilling locations is described below.

Locate Items Request for Delivery Order

> **Note:**
>
> Selecting a sourcing location for a ship-for-pickup order is very similar. See *About Ship-for-Pickup Orders* for key differences.

Which locations have the product(s) available for shipment or transfer? A delivery order means that the product(s) should be shipped to the customer's home.

> **Note:**
>
> The locations where a product is available for pickup might differ from the locations where a product is available for shipment, based on the settings of the Pickup Available, and Delivery Available flags. For example, you might flag your retail store locations as Pickup Available and your warehouse as Delivery Available.

Grouping shipments? The Group Shipment Locations setting at the **Preferences** screen controls how the LocateItems response works for delivery requests:

- If the Group Shipment Locations preference unselected, the response message lists locations where the available quantity should be able to fulfill the order. The logic is described below.
- If the Group Shipment Locations preference is selected, the Routing Engine uses the same logic described below for when the preference is unselected; however, the response does not include details on each location that can fulfill the order. Instead, the response just includes the virtual (non-existent) location, indicating that the order can be fulfilled through the Routing Engine.

  The chart below illustrates the logic used to select locations to include in the response message if the Group Shipment Locations preference is unselected, the Allow Split Order preference is selected, the request message does not specify a *requested location*, and splitting is not prohibited based on carrier. If the request is subject to *zone fulfillment*, then the eligible locations considered are restricted to the primary or alternate locations specified for the zone.

> **Note:**
>
> The response includes the virtual location even when the only locations that meet the criteria are backordered, if they are flagged as Backorder Available.

Basic evaluation: To be included in the LocateItems response message without splitting a potential order or line, a location must:

- have a quantity available that is not less than the requested quantity after applying any active probability rules, or be flagged as Backorder Available. If the request specifies more than one product the response message includes locations only if they stock both (or all) products in the request message.
- be flagged as Delivery Available
- be within the proximity specified in the LocateItems request message based on the postal code indicated (**Note:** The SubmitOrder message does not specify a proximity radius)
- Not be excluded:
  - because it is within the same system as the requesting location, if the Disallow shopping within same system flag is selected at the **System** screen.
  - based on the Maximum No. Responses specified for the organization.
  - because the total number of delivery or ship-for-pickup orders assigned for fulfillment or sourcing for the current date meets or exceeds the Maximum Daily Orders limit specified at the *Preferences* screen. This evaluation takes place only if the Use Maximum Order Limits preference is selected; see *Using Maximum Daily Order Assignment* for more information.
  - based on any probability rules for which the location(s) or items are eligible. These rules apply before determining which locations to include in the response, and the availability information (available quantity, next purchase order date, and next purchase order quantity) to provide. For example, if a probability rule for a location indicates to reduce the available quantity by 10, Order Broker subtracts 10 from the availability quantity that is indicated in the response message.

Exclude Locations with Zero Available? If the Exclude Locations with Zero Availability setting at the *Preferences* screen is selected, any possible product locations whose current available to promise quantities are 0 or less are excluded from consideration before the application of any potential probability rules.

Gift wrap? If the `gift_wrap` tag in the request is set to Y and the *Use Attribute Rules* flag is selected at the **Preferences** screen, only locations that are flagged to support gift wrap are eligible.

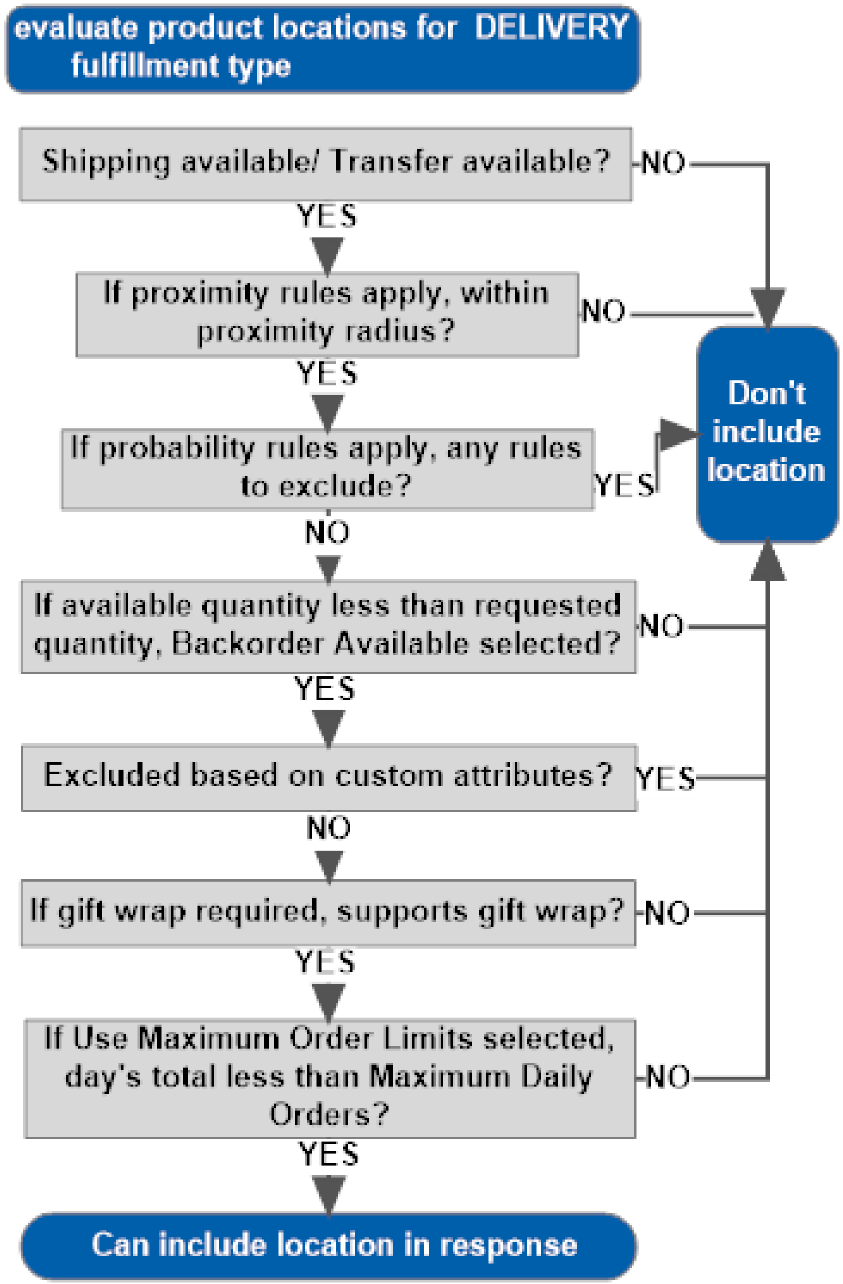
Zone fulfillment? If you use zones for fulfillment and the shipping address is within a zone, only locations specified for the zone are eligible for selection through the Routing Engine. See *Using Zones for Fulfillment* for more information.

Specific location requested? If the request message specifies a requested location such as the customer's favorite store, then the response message includes only the requested location in the response, regardless of the Order Broker rules set up at the **Preferences** screen or whether the location is otherwise eligible (for example, through zone fulfillment, or whether it is within the same system if the Disallow shopping within same system flag is selected for the system). See the *requested location* for more information.

Do Not Split Order For Carrier?If the specified ship via matches the Do Not Split Order For Carrier specified at the **Preferences** screen and the fulfillment type is delivery, then the Routing Engine does not consider whether the request could be fulfilled by splitting the order across multiple locations.

If weighted brokering is enabled: Because weighted brokering is not evaluated when processing the Locate Items message, the Locate Items response simply lists eligible locations in order of proximity, and does not reflect any Science Engine calculations.

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.



Location Selection

If Use Weighted Brokering Rules *is* selected at the **Preferences** screen, the locations are listed in proximity sequence. The Weighted Brokering rules do not apply to LocateItems request processing, and the Science Engine is not used for a Locate Items search.

If Use Weighted Brokering Rules is *not* selected at the *Preferences* screen (Standard Brokering). the Routing Engine uses the method described below to select locations for delivery orders.

Overrides: When selecting locations, the Routing Engine uses the Order Broker criteria in the order specified at the **Preferences** screen unless you have used the *Edit Order Broker Preference Override* screen to set an override sort preference for the system, order type, and Express carrier setting:

- Proximity
- Location Priority
- On Hand Count
- Last Order Assigned
- Sales Velocity Rank

These criteria are ranked at the **Preferences** screen or the *Edit Order Broker Preference Override* screen to indicate which criterion to apply first. For example, if the Proximity criterion has a setting of *1*, the closest locations are listed first, followed by locations that are farther from the requesting location. See *Selecting a Location for a Delivery Order*.

> **Note:**
>
> The Last Order Assigned and Sales Velocity Rank criteria are optional.

If *zone fulfillment* applies, then the criteria above apply to the primary or alternate locations specified for the zone. See *Using Zones for Fulfillment* for a discussion.

If the Disallow shopping within same system flag is selected at the **System** screen for the requesting location's system, then the criteria above apply only to locations in other systems.

How many locations listed? If the Group Shipment Locations preference is unselected, the Routing Engine checks the Maximum No. Responses setting to determine how many possible locations to include in the LocateItems response. If not all eligible locations are included, the response eliminates locations based on the Order Broker selection criteria specified at the **Preferences** screen or the **Edit Order Broker Preference Override** screen. For example, if the first criterion is proximity, and the Maximum No. Responses is set to 5, the 5 closest qualifying locations are included.

If the request specifies a *requested location*, then only the requested location is included in the response, and it is included regardless of whether the location is within the related zone when *zone fulfillment* applies.

Splitting orders? When it receives a request, the Routing Engine always checks first to see if there is a location that could fulfill the entire order. Otherwise, if there is not a single location that can fulfill the order and the Allow Split Order preference is:

- selected, the Routing Engine next checks whether assigning a single line to multiple locations can make it possible to fulfill the order. In this case, the response lists the locations that have the item available.
- unselected, the Routing Engine does not attempt to split any order lines.

Splitting lines? If the Allow Split Order preference is selected, but assigning the individual lines to different locations does not make it possible to fulfill the order completely, the Routing Engine next checks the Allow Split Line setting at the **Preferences** screen to determine whether it can attempt to fulfill the order by splitting the quantity for a single item across multiple locations. If the Allow Split Line preference is:

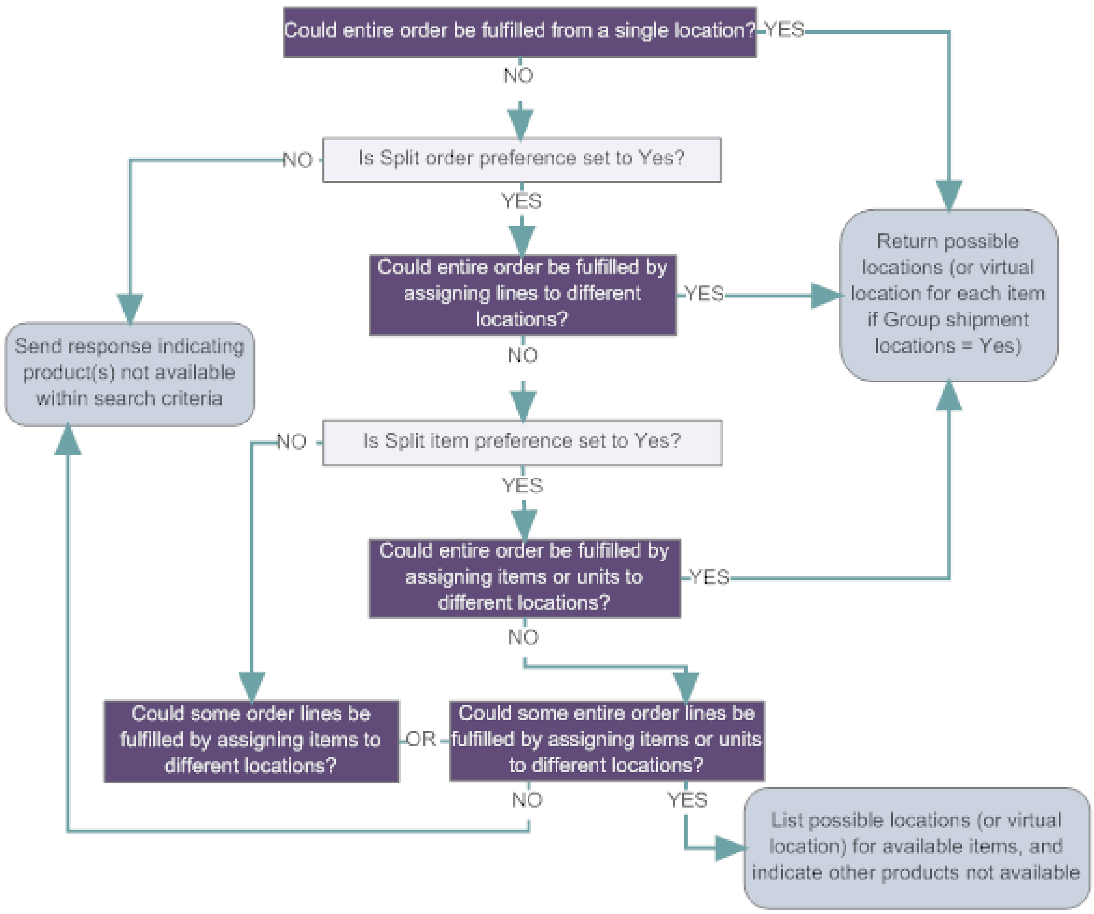
- selected, the Routing Engine next checks whether the order can be fulfilled by assigning the individual lines to different locations. If the order would be split, the Routing Engine evaluates each order line individually based on your Preferences settings. In this case, the sequence in which the locations are listed in the response indicates their eligibility based on your preferences.
- unselected and the order could not be fulfilled without splitting, the Routing Engine indicates that the order cannot be fulfilled.

Splitting lines with backorder available? The LocateItems response message lists locations that could partially fulfill an order line regardless of whether any of these locations are flagged as Backorder Available. However, when you send the SubmitOrder message, the Routing Engine splits the line across locations using your specified criteria until it comes to the location flagged as Backorder Available; when it comes to this location, the Routing Engine assigns the remaining quantity of the item. See *LocateItems Sequence and Splitting Examples (Standard Brokering)* for an example.

Partially fulfill? If splitting the order or the lines does not make it possible to completely fulfill the order, the LocateItems response indicates the locations that could fulfill individual lines on the order. Lines that could not be completely fulfilled, even after splitting the line across locations, are indicated in the response with the message `Product not available within search criteria`.

Do Not Split Order For Carrier? If the specified ship via matches the Do Not Split Order For Carrier specified at the **Preferences** screen and the fulfillment type is delivery, then the Routing Engine does not consider whether the request could be fulfilled by splitting the order across multiple locations.

> **Note:**
>
> When determining whether a location can fulfill an order, the Routing Engine first checks for locations that have the required quantity on-hand; however, if there are no locations with the quantity on-hand, the Routing Engine considers locations flagged as Backorder Available.



LocateItems Sequence and Splitting Examples (Standard Brokering)

> **Note:**
>
> Selecting sourcing locations for a ship-for-pickup order is very similar. See *About Ship-for-Pickup Orders* for key differences.

Location sequence in response: When the Routing Engine receives a request message for a delivery order and you are not using the Group Shipment Locations option, the sequence of the locations listed in the response message indicates the order in which the Routing Engine would select a location for fulfillment of the order.

Example: If your preferences indicate to select a location first based on proximity, the first location listed in the response is the location closest to the customer's address based on postal code. If two or more locations are the exact same distance from the customer's address, the Routing Engine checks the next criterion, such as available quantity.

Zone fulfillment? If you use zones for fulfillment and the shipping address is within a zone, only locations specified for the zone are eligible to be included in the response when the fulfillment type is DELIVERY. See *Using Zones for Fulfillment* for more information.

Specific location requested? If the request message specifies a requested location such as the customer's favorite store, then the response message includes only the requested location in the response, regardless of the Order Broker rules set up at the **Preferences** screen or whether the location is otherwise eligible through zone fulfillment or if the location has exceeded the maximum number of orders and you are *Using Maximum Daily Order Assignment*. See the *requested location* for more information.

Maximum order limits? When the Use Maximum Order Limits preference is selected for the organization, the LocateItems response message for a delivery request excludes locations if the number of orders assigned for the current date meets or exceeds the Maximum Daily Orders limit specified at the **Preferences** screen. See *Using Maximum Daily Order Assignment* for more information.

Gift wrap? If the `gift_wrap` tag in the request is set to Y and the *Use Attribute Rules* flag is selected at the **Preferences** screen, only locations that are flagged to support gift wrap are eligible.

Criteria based on location: The Order Broker search criteria of proximity, last order assignment, or priority number are based on the location itself, so the sequence of locations in the response message is not affected by the products requested.

Example: Highest priority Order Broker setting is Proximity (set at either the Preferences screen or through the Order Broker Preference Overrides screen)

Product AB100 and product BC200 available in:

- location 10: 10.21 miles from the customer’s location based on postal code
- location 20: 7.88 miles from the customer’s location based on postal code

Result: The response lists location 20 before location 10.

> **Note:**
>
> If a product is available in a location that has the Use Proximity Locator preference unselected, then the distance calculated from the customer’s location is always *0*. If you use the Proximity Order Broker criterion, you might apply this preference to your distribution center in order to have it always be the “preferred” location for delivery requests.

Location sequence based on available quantity if multiple products requested: If your Order Broker search criteria at the **Preferences** screen or the **Edit Order Broker Preference Override** screen are based primarily on on-hand count, this location sort logic is based on the combined available quantity for all requested products in each location where the products are available.

Example: Highest priority Order Broker setting is On Hand Count (set at either the Preferences screen or through the Order Broker Preference Overrides screen)

Example:

- Product CD100:
  - 400 available in location 11
  - 50 available in location 22
- Product DE200:

  - 10 available in location 11
  - 75 available in location 22

Result: If the message requests:

- just CD100: location 11 is listed first (available quantity of 400 is greater than 50)
- just DE200: location 22 is listed first (available quantity of 75 is greater than 10)
- both CD100 and DE200: location 11 is listed first (combined available quantity of 410 (400 + 10) greater than combined available quantity of 125 (50 + 75))

> **Note:**
>
> If your response includes locations with a negative quantity (included because the Backorder Available flag is selected), then it is possible that the first location listed might not have all requested products in stock, even when you are searching based on on-hand count. For example, location 33 has an average available quantity of 25 (20 of product EF300 and -5 of product FG400), while location 44 has an average available quantity of 6 (7 of EF300 and 5 of FG400). In this situation, location 33 is listed first in the response message.

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.

Location sequence based on sales velocity rank if multiple products requested: If your Order Broker search criteria at the **Preferences** screen or the **Edit Order Broker Preference Override** screen are based primarily on sales velocity rank, this location sort logic is based on the combined sales velocity for all requested products in each location where the products are available.

Example: Highest priority Order Broker setting is sales velocity rank (low to high, set at either the Preferences screen or through the Order Broker Preference Overrides screen)

- Product CD100:
  - sales velocity is 40 in location 11
  - sales velocity is 5 in location 22
- Product DE200:
  - sales velocity is 10 in location 11
  - sales velocity is 30 in location 22

Result: If the message requests:

- just CD100: location 11 is listed first (sales velocity of 40 is greater than 5)
- just DE200: location 22 is listed first (sales velocity of 30 is greater than 10)
- both CD100 and DE200: location 11 is listed first (combined sales velocity of 45 (40 + 5) greater than combined sales velocity of 40 (10 + 30))

> **Note:**
>
> If a product location has a sales velocity setting of 0 (for example, because the system has not yet reported a sales velocity), this setting counts as the lowest possible sales velocity.

Sequence if splitting: If the Allow Split Order preference is selected and the Routing Engine would not be able to fulfill an order for all requested items without splitting it across multiple locations, the response lists the possible locations in a different sequence for each requested item.

Example: Highest priority Order Broker setting is On Hand Count (set at either the Preferences screen or through the Order Broker Preference Overrides screen), splitting order

- Product GH100
  - 10 available in location 55
  - 20 available in location 66
- Product HI200
  - 15 available in location 66
  - 43 available in location 77
- Product IJ300:
  - 17 available in location 88
  - 23 available in location 99

Result: If the message requests all 3 items, the response lists the locations for each based on the available quantity of each item in each eligible location:

- GH100: location 66 (20 available) before location 55 (10 available)
- HI200: location 77 (43 available) before location 66 (15 available)
- IJ300: location 99 (23 available) before location 88 (17 available)

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.

Splitting order if not all items available: If the Allow Split Order preference is selected, then the response indicates which items could be fulfilled, and which items are not available in the quantity requested.

Example: Splitting order, not all items available in requested quantities

- Product KL100, requested quantity 1:
  - 10 available in location 12
  - 20 available in location 23
- Product MN200, requested quantity 5:
  - 15 available in location 34
  - 4 available in location 45
- Product OP300, requested quantity 7: 2 available in location 56

Result: If the message requests all 3 items, the response indicates:

- KL100: lists location 12 and location 23
- MN200: lists location 34; location 45 not listed since available quantity of 4 is less than requested quantity of 5
- OP300: indicates `Product not available within search criteria`

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.

Maximum number of responses: The response does not include more locations than the Maximum No. Responses specified at the **Preferences** screen, even if the Allow Split Line preference is selected and the order line would need to be split over more locations than permitted under the Maximum No. Responses.

Example: Splitting items, locations required to fulfill requested quantity exceeds Maximum No. Responses

- Product QR100, requested quantity 10:
  - 2 available in location 67
  - 2 available in location 78
  - 2 available in location 89
  - 3 available in location 90
  - 3 available in location 91
- Maximum No. Responses = 3

Result: The response lists location 90 (3 available), location 91 (3 available), and location 67 (2 available). Although the response lists a total quantity available of 8, the additional locations not listed in the response have sufficient inventory to fulfill the entire quantity if the order line is split.

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.

Grouping shipments and splitting orders: If the Group Shipment Locations and Allow Split Order preferences are selected, the response indicates which of the requested items are available in the quantities indicated; however, if the Allow Split Order preference is unselected, then if any requested item is not available in the requested quantity, then the entire order is considered to be not available.

Example: Grouping shipments, one requested item not available

- Product KL100, requested quantity 1:
  - 10 available in location 12
  - 20 available in location 23
- Product MN200, requested quantity 5:
  - 15 available in location 34
  - 4 available in location 45
- Product OP300, requested quantity 7: 2 available in location 56

Result:

If the message requests all 3 items and Allow Split Order is selected, the response indicates:

- KL100 and MN200: indicates available in the virtual location
- OP300: indicates `Product not available within search criteria`

If the message requests all 3 items and Allow Split Order is unselected, the response indicates `Product not available within search criteria` for all 3 items

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.

Splitting an order line if a location is flagged as Backorder available: If the Allow Split Order and Allow Split Line preferences are both selected, then the Routing Engine splits a single line across multiple locations. However, if one of the locations it would select is flagged as Backorder Available, then that location serves as a catch-all to fulfill the remaining quantity of the order line.

Example: Splitting an order line across multiple locations with one location flagged as Backorder available

- Product KL100, requested quantity 15:
  - 3 available in location 12

    7 available in location 23

    2 available in location 37

    1 available in location 49

    2 available in location 82

Result:

- If the Maximum No. Responses is not set less than 5 and the first Order Broker criterion is On Hand Count, the response lists the locations in the following order:
  - 7 available in location 23
  - 3 available in location 12
  - 2 available in location 37
  - 2 available in location 82
  - 1 available in location 49
- However, if location 37 were flagged as Backorder Available, when you submitted an order line for a quantity of 15, the Routing Engine splits the line across locations as follows:
  - 7 assigned to location 23
  - 3 assigned to location 12
  - 5 assigned to location 37

Submit Order Request for Delivery Order (Standard Brokering)

The following process applies when Use Weighted Brokering Rules is not selected.

> **Note:**
>
> The process for selecting a sourcing location for a ship-for-pickup order is very similar. See *Enable Ship-For-Pickup?* for key differences.

Location designated? The originating location can specify the location(s) to fulfill a delivery order and indicate the selected location(s) in the submit order message. For example, you might use the locate items request and response to initially generate a list of possible locations, and then select a location from this list to designate in the submit order request. When the fulfilling location is designated in the submit order request, the Routing Engine confirms that each location is eligible to fulfill the order, based on:

- *Location eligible?* The Delivery Available flag at the *Preferences* screen must be selected.
- *Backorder eligible?* If the location does not have the requested quantity of each item on the order available after checking on inventory if it's in an online system, and applying any probability rules (less any reserved quantity or fulfilled quantity; see *Calculating the Available to Promise Quantity*), the Backorder Available flag at the *Preferences* screen must be selected.

If a designated location is not eligible based on the above criteria, the Routing Engine returns an error to the submit order request message. However, if the location is otherwise eligible, the Routing Engine assigns the order to the specified location even if the location is:

- not within the related zone when you use *zone fulfillment*, or
- excluded based on probability rules, or
- within the same system as the requesting system, even if the Disallow shopping within same system flag is selected for the system.

Gift wrap? If the `gift_wrap` tag in the request is set to Y and the *Use Attribute Rules* flag is selected at the **Preferences** screen, only locations that are flagged to support gift wrap are eligible.

> **Note:**
>
> Regardless of the setting of the Allow Split Order and Allow Split Line preferences, the Routing Engine does not split an order or line when the fulfilling location is specified in the request message.

If location not designated: The Routing Engine uses the same logic to select a fulfilling location for a delivery order when it receives a locate items request as when it receives a submit order request without a fulfilling location specified. The Routing Engine checks each location stocking the requested item(s):

- Excludes the location that generated the order.
- If the shipping address falls within a fulfillment zone, restricts the results to the primary locations specified for the zone. See *Using Zones for Fulfillment* for a discussion.
- If the Disallow shopping within same system flag is selected for the system of the requesting location, excludes all other locations for that system.

- Applies any proximity rules to determine whether a location is an acceptable distance from the customer's shipping address.
- If the `gift_wrap` tag in the request is set to Y and the *Use Attribute Rules* flag is selected at the **Preferences** screen, only locations that are flagged to support gift wrap are eligible.
- Considers locations only if the Delivery Available flag at the *Preferences* screen is selected.
- Excludes a location if the total number of delivery orders assigned for the current date meets or exceeds the Maximum Daily Orders limit specified at the **Preferences** screen. This evaluation takes place only if the Use Maximum Order Limits preference is selected; see *Using Maximum Daily Order Assignment* for more information.
- Determines the Available to Promise quantity: see *Calculating the Available to Promise Quantity*.
- Applies any probability rules to determine whether to include the location and to calculate the available quantity to use for evaluation purposes. For example, you might have a probability rule to exclude a location if the available quantity is less than 2, or a rule to include the quantity expected to be received on an upcoming purchase order in the available quantity.

  > **Note:**
  >
  > If the Exclude Locations with Zero Availability setting at the *Preferences* screen is selected, any possible product locations whose current available to promise quantities are 0 or less are excluded from consideration before the application of any potential probability rules.

- After performing the above calculations, considers each location as eligible only if it has at least the requested quantity available for each requested item (less any reserved quantity and fulfilled quantity; see *Calculating the Available to Promise Quantity*), or if it is flagged as Backorder Available.
- If there is more than one eligible location at this point, applies the Order Broker selection criteria specified at the *Preferences* screen or the *Edit Order Broker Preference Override* screen to select the locations eligible to fulfill the order. You assign each of the five criteria with a rank to indicate which criterion to use first. The selection criteria are:
  - *Proximity:* Set this criterion to *Closest* to select the eligible location closest to the customer's address. You might choose this setting to save on shipping costs.
  - *Location Priority:* Set this criterion to *Low to High* to select the eligible location whose location priority is the lowest number. The location priority is a number you assign to a location, location type, or organization to control the Routing Engine search logic.
  - *On-hand count:* Set this criterion to *High to Low* to select the eligible location where the Available to Promise quantity of the product is highest. You might use this setting to avoid depleting the inventory in any one location.
  - *Last order assigned:* Set this criterion to *Variable* to select the eligible location whose last order assignment date and time was the earliest. You might choose

this setting to create an even distribution of orders among eligible locations. This criterion is optional.

- *Sales velocity rank:* Set this criterion to *Low to High* to select the eligible location where the product's *Sales Velocity* is lowest. This criterion is optional.
- *Criterion ranking:* The Routing Engine uses the criterion with the highest rank to select the fulfilling location. If there is a "tie" (for example, if two locations have the same Available to Promise quantity or the same location priority), the Routing Engine uses the next criterion based on assigned rank.

Example: The On-hand Count preference is ranked at *1* with an Order of *Descending* (highest to lowest), so the Routing Engine selects the location with the highest Available to Promise quantity. If there are two locations with the same available quantity, the Routing Engine checks the selection criterion ranked at *2*: this is Location Priority, and it has an Order of *Ascending* (lowest to highest). As a result, the Routing Engine selects the location whose Location Priority is *1* over a location whose Location Priority is *5*.

Using alternate locations for a fulfillment zone: If the shipping address falls within a fulfillment zone and the order cannot be assigned using the primary locations specified for the zone, the Routing Engine next uses the steps above to attempt to assign the order using the alternate locations for the zone. If the order can using the alternate locations for the zone and you split orders, the Routing Engine then uses the steps above to attempt to assign the order across both the primary and alternate locations for the zone. See *Using Zones for Fulfillment* for a discussion.

Acknowledge order before brokering? If the Acknowledge Order Before Brokering preference is selected, the Order Broker does not select a fulfilling location before sending the submit order response message; instead, it confirms that the order information, such as address, products, and originating location, is valid, assigns the order to a temporary *IN PROCESS* location, and then sends the response message as to an order acknowledgment. The Order Broker then proceeds with location selection. The originating system can send a status inquiry request afterward to determine the assigned location(s). See *Acknowledge Order Before Brokering* for a discussion.

Order rejected? When a location rejects an order or line, the Routing Engine goes through the same selection criteria again; however, it excludes any location that has already rejected the order or line. Also, when you split orders, if the entire order is rejected, the Routing Engine does not attempt to assign all lines to the same fulfilling location; instead, it searches for locations for each line individually.

> **Note:**
>
> Even if the original submit order request message specified a fulfilling location, the Routing Engine uses its standard selection logic when the assigned location rejects the order or line.

If the Routing Engine cannot find a location for fulfillment: If at any point the Routing Engine receives a submit order message and cannot find an eligible location to ship the order or line, or if an order or line is rejected by an assigned location and the number of Search Retries specified at the *Preferences* screen is exceeded, the Routing Engine assigns the order or line to the Default Unfulfillable Location specified at the *Preferences* screen. By assigning an order or line to the Default Unfulfillable Location, the Routing Engine is flagging the order or line as unfulfillable. When the requesting system receives a status inquiry response message indicating that an order or line is assigned to this location, this indicates to the system that it either needs to fulfill the order or line using its internal processes or cancel the order or line.

Example: Splitting an order at initial submission with subsequent rejection

- Product KL100, requested quantity 2:
  - 1 available in location 12
  - 1 available in location 23

Result:

- Order created, with 1 unit assigned to location 12 and 1 unit assigned to location 23.

> **Note:**
>
> If only 1 unit were available when the submit order message was received, the Routing Engine would have assigned the entire order to the default unfulfillable location.

Example: When a split order line rejected:

Result:

- The Routing Engine puts the second order line in unfulfillable status; however, the order is still open if location 12 can fulfill the first order line.

For more information: See *Calculating the Available to Promise Quantity* and *Using Probability Rules* for information on factors that affect the available quantity.

Submit Order Request for Delivery Order (Weighted Brokering)

The following process applies when Use Weighted Brokering Rules is selected.

> **Note:**
>
> Selecting a sourcing location for a ship-for-pickup order is very similar. See *About Ship-for-Pickup Orders* for key differences.

Location designated? The originating location can specify the location(s) to fulfill a delivery order and indicate the selected location(s) in the submit order message. For example, you might use the locate items request and response to initially generate a list of possible locations, and then select a location from this list to designate in the submit order request. When the fulfilling location is designated in the submit order request, the Routing Engine confirms that each location is eligible to fulfill the order, based on:

- *Location eligible?*The Delivery Available flag at the **Preferences** screen must be selected.
- *Backorder eligible?* If the location does not have the requested quantity of each item on the order available after checking on inventory if it’s in an online system, and applying any probability rules (less any reserved quantity; see *Calculating the*

Available to Promise Quantity), the Backorder Available flag at the **Preferences** screen must be selected.

If a designated location is not eligible based on the above criteria, the Routing Engine returns an error to the submit order request message. However, if the location is otherwise eligible, the Routing Engine assigns the order to the specified location even if the location is:

- not within the related zone when you use zone fulfillment, or
- excluded based on probability rules, or
- within the same system as the requesting system, even if the Disallow shopping within same system flag is selected for the system.

Gift wrap? If the `gift_wrap` tag in the request is set to Y and the *Use Attribute Rules* flag is selected at the **Preferences** screen, only locations that are flagged to support gift wrap are eligible.

> **Note:**
>
> Regardless of the setting of the Allow Split Order and Allow Split Line preferences, the Routing Engine does not split an order or line when the fulfilling location is specified in the request message.

If location not designated: When Use Weighted Brokering Rules is selected, the Routing Engine submits a listing of eligible locations to the Science Engine, along with additional data to enable the Science Engine to select the fulfilling location(s) for the order. However, before submitting the information to the Science Engine, the Routing Engine filters the list of eligible locations to those that stock the requested item(s), and:

- Excludes the location that generated the order.
- If the shipping address falls within a fulfillment zone, restrict the list to the primary locations and secondary locations specified for the zone. See *Using Zones for Fulfillment* for a discussion.
- If the Disallow shopping within same system flag is selected for the system of the requesting location, excludes all other locations for that system.
- Applies any proximity rules to determine whether a location is an acceptable distance from the customer’s shipping address.
- Considers locations only if the Delivery Available flag at the **Preferences** screen is selected.
- Excludes a location if the total number of delivery orders assigned for the current date meets or exceeds the Maximum Daily Orders limit specified at the **Preferences** screen. This evaluation takes place only if the Use Maximum Order Limits preference is selected; see *Using Maximum Daily Order Assignment* for more information.
- Determines the Available to Promise quantity: see *Calculating the Available to Promise Quantity*.
- Applies any probability rules to determine whether to include the location and to calculate the available quantity to use for evaluation purposes. For example, you might have a probability rule to exclude a location if the available quantity is less than 2, or a rule to subtract 10% from the reported available quantity for certain locations.

> **Note:**
>
> If the Exclude Locations with Zero Availability setting at the **Preferences** screen is selected, any possible product locations whose current available to promise quantities are 0 or less are excluded from consideration before the application of any potential probability rules.

- After performing the above calculations, considers each location as eligible only if it has at least the requested quantity available for each requested item (less any reserved quantity; see *Calculating the Available to Promise Quantity*), if the order might be split across the eligible locations that collectively have the requested quantity, or if the location is flagged as Backorder Available.

Do Not Split Order For Carrier? If the specified ship via matches the Do Not Split Order For Carrier specified at the **Preferences** screen and the fulfillment type is delivery, then the Routing Engine does not consider whether the request could be fulfilled by splitting the order across multiple locations.

Submission to Science Engine: The Routing Engine then submits the list of eligible locations to the Science Engine. The information sent to the Science Engine includes:

- Order line information: order type, request ID, line number, product code, selling price
- Configuration information: Weighted Brokering criteria (the percentage weights assigned for Labor Cost, Gross Margin, Proximity, On Hand Quantity, and Sales Velocity, as well as the Priority for evaluating sales velocity), Allow Split Order setting, Allow Split Line setting, and Maximum Order Splits setting
- Information on each eligible product location: Product code, System code, Location code, Available to Promise quantity after subtracting any reserved quantity and applying any probability rules, distance, zone group level (primary or secondary), Backorder Available setting, On Clearance setting, Selling Price, Cost, Sales Velocity, and the location's Labor Cost

Criteria for fulfilling location assignment: The Science Engine uses similar criteria for fulfilling location assignment to standard brokering criteria, except in each of the following scenarios, if more than one location could fully or partially fulfill the order, select a location based on weighted brokering rules:

1. *Single location?* If a single location could fulfill the entire order with its on-hand quantity, use that location, selecting a primary location if the order is subject to fulfillment zone processing; otherwise,
2. *Fulfill by splitting order?* If Use Split Order is selected, and the entire order could be fulfilled across more than one location by splitting the order, but not the line quantities, with the locations' on-hand quantities and without exceeding the Maximum Order Splits, use these locations. If the order is subject to fulfillment zone processing, split the order only across primary locations; otherwise,
3. *Fulfill by splitting order and lines?* If Use Split Order and Use Split Line are selected, and the entire order could be fulfilled across more than one location by splitting the order and line quantities with the locations' on-hand quantities and without exceeding the Maximum Order Splits, use these locations. If the order is subject to fulfillment zone processing, split the order and lines only across primary locations; otherwise,

4. *Fulfill by splitting order in primary or alternate locations in zone?* If the order is subject to fulfillment zone processing, Use Split Order is selected, and the entire order could be fulfilled across more than one Primary or alternate location by splitting the order, but not the line quantities, with the locations' on-hand quantities and without exceeding the Maximum Order Splits, use these locations; otherwise,
5. *Fulfill by alternate locations in zone?* If the order is subject to fulfillment zone processing and could not be fulfilled by assignment to primary locations, but a single alternate location could fulfill the entire order with its on-hand quantity, use that location; otherwise,
6. *Fulfill by splitting order and lines in primary or alternate locations in zone?* If the order is subject to fulfillment zone processing, Use Split Order and Use Split Line are selected, and the entire order could be fulfilled across more than one Primary or alternate location by splitting the order and line quantities with the locations' on-hand quantities and without exceeding the Maximum Order Splits, use these locations; otherwise,
7. *Fulfill by assignment to backorder location(s)?* If any eligible locations are flagged as Backorder Available, select one of these locations with the highest on-hand quantity. The order and lines can also be split as in the above scenarios, as long as the Maximum Order Splits is not exceeded.

See *Science Engine Examples* for information on how the Science Engine evaluates potential locations based on the weighted brokering criteria passed, and see *Primary and Alternate Search Hierarchy: Weighted Brokering* for details on fulfillment zone processing.

Response from Science Engine: The Science Engine returns one of the following responses:

- Fulfillable: The complete quantity of the order is fulfillable, based on the available to promise quantity without relying on backorder fulfillment.

  The Science Engine returns the location(s) to the Routing Engine.
- Fulfillable through backorder: The order line(s) are fulfillable only by assigning one or more units or lines to a backorder location because the full quantities are not available.

  The Science Engine returns the location(s) to the Routing Engine, but also provides a reason code identifying how it selected the location(s). The following reason codes are stored in the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table; however, no Transaction Note is displayed at the Order screen:
  - 4000: An order or line had to be assigned to a backorder location that was currently without sufficient inventory, because the entire order could not be assigned to locations with sufficient inventory without exceeding the Maximum Order Splits. For example, an order includes a line for 1 unit of item A, and another line for 2 units of item B. Location 100 can fulfill the line for item A. Locations 200 and 300 each have 1 unit item B. The Maximum Order Splits is set to 2. If location 200 supports backorders, the line with 2 units of item B is assigned there.
  - 5000: An order or line had to be assigned to a backorder location that was currently without sufficient inventory, because there were no locations that had the inventory on-hand; however, this was not the result of the Maximum Order Splits setting being exceeded.
  - 8000: An order or line could have been assigned to locations with inventory if split order or line were allowed; but since the order or line could not be split, it was assigned to a backorder location that was currently without sufficient inventory.
- Unfulfillable: The order line(s) are not fulfillable even by assigning one or more units or lines to a backorder location, either because backorder locations are not available or because of a limit to splitting the order or lines.

The Science Engine returns a reason code identifying why the order could not be fulfilled. The following reason codes are stored in the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table:

– Exceed Maximum Number of Splits: The Science Engine returned a code indicating that the entire order could not be fulfilled without exceeding the Maximum Order Splits, so the entire order is unfulfillable. This response can occur for a single-line order that could have been fulfilled by splitting the line, but split line is not enabled. A reason code of 1000 is stored as the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table.

– Not Enough Inventory and No Backorder Location: The Science Engine returned a code indicating that the entire order, or a line on the order, could not be fulfilled because there was not sufficient inventory on-hand, and there was not an eligible location that supported backorders. A reason code of 2000 is stored as the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table if the entire order was unfulfillable, and a reason code of 3000 is stored for an individual line that was unfulfillable while other line(s) could be fulfilled.

– Not Fulfilled due to Split Not Allowed: The Science Engine returned a code indicating that the entire order could not be fulfilled without splitting one or more order lines, and Allow Split Line was not selected. The same message is displayed if the order could not be fulfilled without splitting the order, and Allow Split Order was not selected. A reason code of 7000 is stored as the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table if the entire order was unfulfillable, and a reason code of 6000 is stored for an individual line that was unfulfillable while other line(s) could be fulfilled.

Acknowledge order before brokering? If the Acknowledge Order Before Brokering preference is selected, the Routing Engine confirms that the order information, such as address, products, and originating location, is valid, assigns the order to a temporary IN PROCESS location, and then sends the response message as an order acknowledgment regardless of whether it has already received the response from the Science Engine. The originating system can send a status inquiry request afterward to determine the assigned location(s). See *Acknowledge Order Before Brokering* for a discussion.

Order rejected? When a location rejects an order or line, the Routing Engine again submits the order or line to the Science Engine; however, it excludes any location that has already rejected the order or line from the list of eligible locations.

> **Note:**
>
> Even if the original submit order request message specified a fulfilling location, the Routing Engine uses its standard location eligibility logic for submission to the Science Engine when the assigned location rejects the order or line.

If the Science Engine cannot find a location for fulfillment: If at any point the Routing Engine receives a submit order message and Science Engine cannot find an eligible location to ship the order or line, or if an order or line is rejected by an assigned location and the number of Search Retries specified at the **Preferences** screen is exceeded, the Routing Engine assigns the order or line to the Default Unfulfillable Location specified at the **Preferences** screen. By assigning an order or line to the Default Unfulfillable Location, the Routing Engine is flagging the order or line as unfulfillable. When the requesting system receives a status inquiry response message indicating that an order or line is assigned to this location, this indicates to the system that it either needs to fulfill the order or line using its internal processes or cancel the order or line.

When the requesting system receives a status inquiry response message indicating that an order or line is assigned to this location, this indicates to the system that it either needs to fulfill the order or line using its internal processes or cancel the order or line.

Science Engine Examples

The Science Engine uses the information passed from the Routing Engine, including the weighted brokering criteria, to select locations if there is more than one eligible location or an order or line needs to be split for fulfillment.

Each of the weighted brokering criteria that have percentage weights greater than 0 are considered.

<table>
<tr><th>Example Description</th><th>Example</th></tr>
<tr><td>Example 1: Select by margin (select the location where the difference between the in-store Selling Price and the Cost is lowest, since it is more profitable to source the online order there)</td><td>In this example:

The Weighted Percentages include a Gross Margin setting of 100%. The remaining percentages are set to 0.
The unit price specified for the order line is 10.00 for a quantity of 1.
There are 2 eligible locations:

Location A has a Selling Price of 5.00 with a Cost of 2.00.
Location B has a Selling Price of 6.00 with a Cost of 2.00.

The margin = the order line unit price - the product location Selling Price - the product location Cost.
For location A, the calculation is: (10.00 - 5.00 - 2.00) * 1 = 3.00, where:

10.00 = the order line unit price
5.00 = the product location Selling Price
2.00 = the product location Cost
1 = the unit quantity
3.00 = overall score

The calculation includes multiplying by the unit quantity, but in this case the unit quantity is 1
For location B, the calculation is: (10.00 - 6.00 - 2.00) * 1 = 2.00, where:

10.00 = the order line unit price
6.00 = the product location Selling Price
2.00 = the product location Cost
1 = the unit quantity
2.00 = overall score

Result: The Science Engine selects location A, because it has the higher score. An in-store purchase in location A results in a lower margin than location B, so it is more profitable to assign the online order to location A.
The Margin displayed for the Product Location differs from the margin calculation performed by the Science Engine. The Science Engine’s calculation includes the order line unit price, while the Margin displayed for a Product Location is simply the in-store Selling Price minus the Cost.</td></tr>
</table>

Example Description	Example
Example 2: Select by net profit (select the location where the overall profit is lowest after factoring in the order unit price, in-store Selling Price, Cost, and Labor Cost)	In this example: • The *Weighted Percentages* include a Gross Margin setting of 60% and a Labor Cost setting of 40%. The remaining percentages are set to 0. • The unit price specified for the order line is 10.00 for a quantity of 1. • There are 2 eligible locations: – *Location A* has a Selling Price of 5.00 with a Cost of 2.00. As in Example 1, the result of the Gross Margin calculation is 3.00. The Labor Cost for Location A is 4.00. – *Location B* has a Selling Price of 6.00 with a Cost of 2.00. As in Example 1, the result of the Gross Margin calculation is 2.00. The Labor Cost for Location B is 2.00. For location A, the calculation is (60% * (10.00 - 5.00 - 2.00) * 1) - (40% * (4.00), or 1.8 - 1.6 = 0.2. – 60% = Gross Margin weight – 10.00 = the order line unit price – 5.00 = the product location Selling Price – 2.00 = the product location Cost – 1 = the unit quantity – 40% = Labor Cost weight – 4.00 = Labor Cost – 0.2 = overall score For location B, the calculation is (60% * (10.00 - 6.00 - 2.00) * 1) - (40% * (2.00), or 1.2 - 0.8 = 0.4, where: – 60% = Gross Margin weight – 10.00 = the order line unit price – 6.00 = the product location Selling Price – 2.00 = the product location Cost – 1 = the unit quantity – 40% = Labor Cost weight – 2.00 = Labor Cost – 0.4 = overall score **Result:** The Science Engine selects location B. After factoring in the higher Labor Cost for location A and the lower Labor Cost for location B, the Science Engine determines that location B is more profitable. **Note:** When you set the *Weighted Percentages* to include both Gross Margin and Labor Cost by applying percentages greater than 0, the Science Engine uses Labor Cost only as part of the net profit calculation by subtracting it from the margin weight as described above. However, if the **Weighted Percentages** include just Labor Cost and have the Gross Margin percentage set to 0, then the Science

Example Description	Example
	Engine uses Labor Cost by itself, based on its percentage weight.
Example 3: Select the best location based on weighted percentages that include both profitability and other criteria. Unlike the other examples, this scenario includes criteria that are not the same units: in this case, currency (such as dollars) and quantity.	In this example: • The *Weighted Percentages* include a Labor Cost setting of 40% and an On Hand setting of 60%. • There are 2 eligible locations: – *Location A* has a Labor Cost of 12.25 and an Available to Promise quantity of 10. – *Location B* has a Labor Cost of 7.75 and an Available to Promise quantity of 7. *Determining the base value:* The Science Engine identifies that the more desirable Labor Cost is 7.75, for Location B, and the more desirable Available to Promise quantity is 10, for location A. The Science Engine uses the more desirable value for each of the criteria as the base for calculation. For each criterion, the Science Engine divides the location's value by the base. If the location's value is the same as the base, the result is 1. For Location A, the calculation is (-40% * (12.25 / 7.75)) + (60% * (10/10)), or -0.032, where: – -40% = Labor Cost weight – 12.25 = location's Labor Cost – 7.75 = base Labor Cost – 60% = On Hand weight – 10 = location's Available to Promise quantity, which is also the base Available to Promise quantity For Location B, the calculation is (-40% * (7.75 / 7.75)) + (60% * (7/10)), or 0.02, where: – -40% = Labor Cost weight – 7.75 = location's Labor Cost, which is also the base Labor Cost – 60% = On Hand weight – 7 = location's Available to Promise quantity, – 10 = base Available to Promise quantity *Result:* The Science Engine selects location B. Its lower Labor Cost outweighs the higher Available to Promise quantity of location A.

Using Attribute Rules for Delivery Orders

You can set up custom attributes to filter the locations eligible to source orders, or where orders can be picked up.

Custom attributes are used only if *Use Attribute Rules* is selected at the **Preferences** screen.

These rules apply when filtering locations for LocateItems, ProductAvailability, and SubmitOrder requests. They also apply when "reshopping" orders as a result of a StatusUpdate request or when the order is rejected through the user interface. If there have been any changes to the attribute assignments to locations or the product since the order line was created, the current attribute assignments apply.

> **Note:**
>
> This setting also controls whether to filter locations when gift wrap is required.

Examples:

Attribute Usage	How to Implement

Engraving required: Product A always requires engraving, so only locations that support engraving can fulfill orders for this product.	*Setup:*
	• Create a custom attribute:
	  – Attribute Type: *Product and Location*
	  – Data Type: *Boolean*
	• Assign the engraving attribute to product A
	• Assign the attribute to each location that supports engraving:
	  – Location Use set to *Sourcing* for locations that can fulfill delivery orders.
	  – Location Use set to *Pickup* for locations that can fulfill pickup orders.
	Web service responses: The LocateItems response, ProductAvailability response, and SubmitOrder response automatically filter locations to those that support engraving based on the attribute assignment and the fulfillment type.

Engraving optional: Product B is eligible for engraving, but can also be ordered without it. The individual request for the product indicates whether engraving is required.	*Setup:*
	• Create a custom attribute:
	  – Attribute Type: *Product and Location*
	  – Data Type: *Boolean*
	  – Do not assign the attribute to product B. Instead, specify the attribute in the LocateItems, ProductAvailability, or SubmitOrder request only when it is required.
	• Assign the attribute to each location that supports engraving:
	  – that can fulfill delivery orders, if your business process includes applying engraving in the sourcing location
	  – Location Use set to *Pickup* for locations that can fulfill pickup orders, if your business process includes applying engraving at the pickup location
	Web service requests: The LocateItems request, ProductAvailability request, SubmitOrder request should include the custom attribute only when engraving is required.
	Web service responses: The responses messages filter eligible locations based on whether they support engraving for the specified Location Use.

<table>
<tr><th>Attribute Usage</th><th>How to Implement</th></tr>
<tr><td>Supported brand: Your organization includes store locations associated with multiple brands, but only locations that are associated with Brand ABC can fulfill orders for the brand.

Location 100 is associated with brand ABC.</td><td>Setup:

Create a custom attribute:

Attribute Type: Location
Data Type: List
List Values: All possible brands for your organization
Allow Multiple: Selected

Assign the attribute value of each supported brand to each location that can originate or fulfill orders.

Location 100: Orders originating here are always associated with brand ABC. Assigned a Value of ABC with a Location Use of Originating.
Location 200: Supports sourcing and pickup of orders for brands ABC and DEF. Assigned Values of ABC and DEF, both with a Location Use of Pickup, and also assigned Values of ABC and DEF with a Location Use of Sourcing.
Location 300: Supports pickup of orders for brand ABC. Assigned a Value of ABC with a Location Use of Pickup.

Web service responses: The LocateItems response, ProductAvailability response, SubmitOrder response filter eligible locations based on the assigned Value for the Originating location (ABC), and the fulfillment type of the order:

Delivery fulfillment type: Only Location 200 is eligible to fulfill the order, because it is the only location assigned a Value of ABC and a Location Use of Sourcing.
Pickup fulfillment type: Both Location 200 and Location 300 are eligible to fulfill the order, because they are both assigned a Value of ABC with a Location Use of Pickup.

Note:
The same results would occur if, instead of assigning the brand attribute with a Value of ABC and a Location Use of Originating to location 100, the brand attribute was passed in the request message with a value of ABC.
</td></tr>
</table>

Attribute setup options: You can use the following options when setting up attribute definitions:

- Attribute Type: Attributes can filter eligible locations based on:
  - *Location and Product:* The location must be consistent with an attribute defined for the product. The attribute might be a universal requirement, such as the engraving required example above, or specified on a case-by-case basis, such as the optional engraving example.
  - *Location:* The location must be consistent with an attribute defined for the originating location. The requirement might apply to the pickup location for a pickup order, or to the sourcing location for a delivery order.
- *Product Type:* Although you can create attributes with an Attribute Type of Product, these attributes are informational only and not used to route orders.

- Data Type: Possible attribute data types are:
  - *Boolean:* The attribute is used to route orders if the Boolean is assigned to the product or originating location, such as the engraving examples above. An assigned Boolean is interpreted as True. Negative Boolean attributes are not supported.
  - *List:* Defines a list of valid values, such as the brand example above. When the attribute is used to route orders, there must be a match with one of the list values.
  - *Text:* Similar to the *List* data type, except it is not validated against a defined list of values.
  - *Number:* Similar to the *List* data type, except it is not validated against a defined list of values, and must be numeric.
- Allow Multiple:
  - *Locations:* Controls whether the attribute can be assigned more than once to a single location with different values and the same Location Use (*Originating*, *Sourcing*, or *Pickup*). For example, a location can support multiple brands. Even if the attribute is set to not allow multiples, a different attribute value can be assigned to the location for each different location use; for example, a location can support engraving when it is a sourcing location, but not when it is a pickup location. Regardless of the Allow Multiple setting, only a single value can be assigned to a location when the Location Use is **Originating**.
  - *Products:* Controls whether the attribute can be assigned more than once with different values to the same product.

    The Allow Multiple setting does not apply to Boolean attributes, and cannot be selected.

  Filter based on multiple attributes? It is possible for multiple location, or product and location attributes to filter eligible locations. For example, one attribute can filter locations that do not support engraving, while another attribute can filter locations based on brand. All attributes apply, regardless of whether:

  - They have been assigned to the product or any potential sourcing or pickup locations;
  - They are passed in the LocateItems, ProductAvailability, or SubmitOrder request message;
  - They were initially applied to the order line at the time that it was created, and it is now being “reshopped.”

  A location is excluded if it does not qualify based on all location or product and location attributes. For example, the *Brand* attribute is applied to location 1 with a Location Use of *Originating* and a value of *ABC*, and a LocateItems request from location 1 passes the *Brand* attribute with a value of brand *DEF* with a *Pickup* fulfillment type. Only locations that are assigned both *ABC* and *DEF* with a Location Use of *Pickup* can be eligible as pickup locations.

  Assigning attributes to locations or products: Use the *New Location Attribute* and *New Product Attribute* screens to assign attributes.

Turn-by-Turn Distance Calculation for Delivery Orders

Overview: If you use the Oracle Maps Cloud Service API for proximity location, you can use turn-by-turn distance calculation, rather than straight-line distance calculation, for delivery orders that use a specified carrier.

Useful when? You might use this option to choose fulfilling locations based on the actual driving distance from the fulfilling location to the customer's address. This way, you can avoid routes with a longer driving distance if, for example, an additional few miles are required to cross a bridge to get from a store location to the customer's address, even though the store location and the customer's address are directly across a river from one another, or if a U-turn is required to drive to the customer's address.

Process overview: Order Broker uses the integration with Oracle Maps Cloud Service to determine the turn-by-turn distance of potential fulfilling locations as follows:

- Submits the customer location to Oracle Maps Cloud Service determine its longitude and latitude.
- Pre-qualifies potential locations based on straight-line distance:
  - Calculates the straight-line distance from each potential fulfilling location, based on the latitude and longitude of each.
  - Eliminates any location whose straight-line distance exceeds the maximum distance, either defined in the web service request or from the *Maximum Turn-by-Turn Distance* defined at the *Preferences* screen, as described below, or that does not have a latitude and longitude defined.
- Submits a turn-by-turn request to Oracle Maps Cloud Service, providing the latitude and longitude of the customer's location as the starting location, and the latitude and longitude of each potential fulfilling location within the specified maximum distance from the customer's location.
- When Oracle Maps Cloud Service returns the actual turn-by-turn distances, Order Broker omits any locations whose turn-by-turn distance exceeds the defined maximum distance from consideration. For example, the maximum distance is defined as 15 miles. The distance for location A was 14.78 miles based on the initial pre-pass calculation, but is 15.5 miles based on the turn-by-turn calculation. As a result, location A is not included in the list of eligible locations.

When does turn-by-turn distance calculation take place? This calculation takes place when:

- You use Order Maps Cloud Service, and have completed the Geocode setup at the *Tenant-Admin* screen, including entering a valid *Turn-by-Turn Distance URL*.
- The carrier specified for the request or order matches the *Carrier for Turn-by-Turn Distance Evaluation* specified at the **Preferences** screen.
- Order Broker needs to find a fulfilling location for a delivery order in response to:
- *Locate items:* When:
  - The `fulfillment_type` in the *locate items* request is DELIVERY, and
  - The `<ship_via>` is the *Carrier for Turn-by-Turn Distance Evaluation*.

    The *Maximum Turn-by-Turn Distance* and unit of measure are used.

  If the request message specifies a requested_location, only that location is returned in the response message, with a distance of 0.0.

- *Product availability:* When:
  - A type of is DELIVERY is specified in the *product availability search* request and,
  - The ship_via is the *Carrier for Turn-by-Turn Distance Evaluation*.

  The range_distance and range_unit, if any, specified in the request are used; otherwise, the *Maximum Turn-by-Turn Distance* and unit of measure are used.
- *Submit Order request:* When:
  - The transaction_type_id is DELIVERY in the *submit order message*, and
  - The ship_via is the *Carrier for Turn-by-Turn Distance Evaluation*.

  The submit order request does not specify a distance or unit of measure, and the *Maximum Turn-by-Turn Distance* and unit of measure are always used.

  Status Update rejecting the order or line: When:
  - The order type for the order specified in the *status update* request message rejecting the order or line is DELIVERY, and
  - The ship via is the *Carrier for Turn-by-Turn Distance Evaluation*.

  The status update request does not specify a distance or unit of measure, and the *Maximum Turn-by-Turn Distance* and unit of measure are always used when the order or order line is rejected.
- *Rejecting an order or line in order inquiry:* When:
  - You change the status to rejected at the *Order* screen or the *Edit Order Item* window, if the order type is DELIVERY, and
  - The ship via is the *Carrier for Turn-by-Turn Distance Evaluation*.

  There is no option to specify a distance or unit of measure in order inquiry, and the *Maximum Turn-by-Turn Distance* and unit of measure are always used in this case.

Troubleshooting:

- As with straight-line distance calculation, the *Shop Order When Proximity Unknown* preference controls how to handle submit order requests when the proximity cannot be determined. See that preference for more information.
- The *Trace Shopping Log* screen indicates when a location is eliminated from consideration based on distance, including turn-by-turn distance, with a Reason of *Proximity Distance*. The distance used as a criterion is indicated.
- Turn-by-turn distance calculation is enabled for a maximum of 50 locations within the requested distance. If there are more than 50 locations, the search will fail.

> **Note:**
>
> - When you configure *Carrier for Turn-by-Turn Distance Evaluation* at the **Preferences** screen, Order Broker does not confirm that the *Turn-by-Turn Distance URL* is configured at the **Tenant-Admin** screen.
> - Similarly, Order Broker does not check whether there are any organizations configured for turn-by-turn distance at the **Preferences** screen if you do not set the Turn-by-Turn Distance URL setting at the **Tenant-Admin** screen.

For more information: See *Using the Oracle Maps Cloud Service API* for background and additional setup information.

Troubleshooting Fulfillment or Sourcing Location Selection

Because there are various factors that can affect how the Routing Engine eliminates potential locations from selection as fulfilling locations (order “shopping”), you can use the *Trace Shopping Log* screen as needed to research shopping logic and resolve questions. This screen provides a listing of the potential product locations for an order, and indicates the reason, if any, why each location is eliminated, including:

- Not supporting the order type
- Not having sufficient inventory
- Probability rule
- Maximum order limit
- Zone fulfillment
- Proximity distance
- Shopping within system not allowed
- Not supporting gift wrap
- Attribute incompatibility

> **Note:**
>
> Oracle recommends that you turn on shopping logic tracing to research questions related to how the routing engine is selected locations, but to otherwise keep tracing turned off in order to enhance system performance.

For more information: See the *Trace Shopping Log* for a discussion and more details.

Acknowledge Order Before Brokering

If the Acknowledge Order Before Brokering flag is selected at the *Preferences* screen, the Order Broker generates the submit order response before selecting a fulfilling location for a delivery order. This option enables the Order Broker to respond more quickly to submit order requests, especially if you process large, multi-line orders.

If this flag is selected, when a system submits a delivery order that does not specify a fulfilling location:

- The Order Broker validates just basic order information, such as address, products, and originating system and location, before acknowledging the order in the submit order response message.
- The order lines are initially assigned to the *IN PROCESS* location, a virtual location used temporarily until the Order Broker completes the fulfilling location selection process, including all shopping logic such as fulfillment zone evaluation, interactive inventory inquiry, and probability rules.
- The Order Broker creates the *IN PROCESS* location if it does not already exist. This location is:
  - assigned to the same system and location type as the default shipping (unfulfillable) location
  - created with the Pickup Available, Delivery Available, Backorder Available, Ship For Pickup Sourcing Available, Ship For Pickup Receiving/Pickup Available flags at the **Preferences** screen all set to *No*
  - assigned the name *Brokered Order Temporary Location*
- The submit order response message always specifies the *IN PROCESS* location for a delivery order unless the request message specified a fulfilling location.
- The order is created with a hidden in_process flag that is set to *Y* until the Order Broker completes location assignment for the order. As long as this flag is set to *Y*, no lines on the order are eligible to be included in the fulfillment response message.
- The originating system needs to submit a status inquiry request after initial order creation to determine the selected fulfilling location.
- If the originating system cancels an order or line while it is still assigned to the *IN PROCESS* location, the Order Broker does not assign the order to an actual fulfilling location.
- The Order Broker does not delay processing or assign a rejected order or line to the **IN PROCESS** location; instead, it “reshops” the order or line immediately.
- If an order or line is still assigned to the **IN PROCESS** location when the Order Broker receives a status update to cancel it, or of the line is in any status other than *new_order*, the Order Broker does not attempt to find a fulfilling location for the order or line.

Cleanup process: A cleanup job runs automatically every hour to check for any orders or lines that were created more than an hour earlier and that are still assigned to the *IN PROCESS* location, and completes processing for these orders or lines.

Use the *Reschedule All* option at the *View Active Schedules* screen to resolve any scheduling issues for the cleanup job. Note that the *Reschedule All* option does not restart jobs that are in Paused status (⊘). Jobs stay in Paused status only briefly before Order Broker restarts them automatically.

> **Note:**
>
> This cleanup job also attempts to send failed requests to RICS when you use *Order Fulfillment through RICS Integration*.

The Acknowledge Order Before Brokering flag is selected by default. If this flag is not selected, the Order Broker complete the fulfilling location selection process as it receives and creates each order, and specify selected fulfilling locations in the submit order response message.

Using Product Availability Search for a Pickup or Delivery Order

The Product Availability search message is similar to the LocateItems search, except that the Product Availability search:

- can include more than one transaction type (pickup or delivery) in a single request, and each type can include its own search range distance
- does not include product location details for delivery searches; instead, it indicates:
  - if the entire requested quantity can be satisfied; otherwise,
  - if a partial quantity of the requested items can be satisfied, the maximum Available to Promise quantity of each item
- for a pickup request, always returns each item location that could partially fulfill the requested quantities of all requested items

Weighted brokering: If Use Weighted Brokering Rules is selected, product availability searches use the same process as the one described under *Selecting the Location for a Pickup Order (LocateItems)* and *Selecting a Location for a Delivery Order*:

- Pickup: The Product Availability response includes the list of eligible pickup locations that have the item(s) available, sorted in order of proximity
- Delivery: The Routing Engine sends the list of eligible locations, along with related data, to the Science Engine, which returns the responses described under *Selecting a Location for a Delivery Order*; the Routing Engine uses this information to populate the Product Availability response

Determining eligible locations and available quantities:

- If Use Weighted Brokering Rules is *not* selected: Most of the existing Order Broker preferences and settings (such as proximity, Fulfillment criteria, probability rules, zone fulfillment, and the Backorder Available setting) apply to product availability searches essentially as they do to LocateItems requests.
- If Use Weighted Brokering Rules *is* selected: See *Selecting a Location for a Delivery Order* for details on how the Routing Engine filters the list of eligible location and the information sent to the Science Engine

About the maximum available quantity: The Product Availability response message indicates a `maximum_available` quantity for items on delivery searches only if the full requested quantity(ies) of all items are not available in eligible locations. See below for examples on how the `maximum_available` quantity is used.

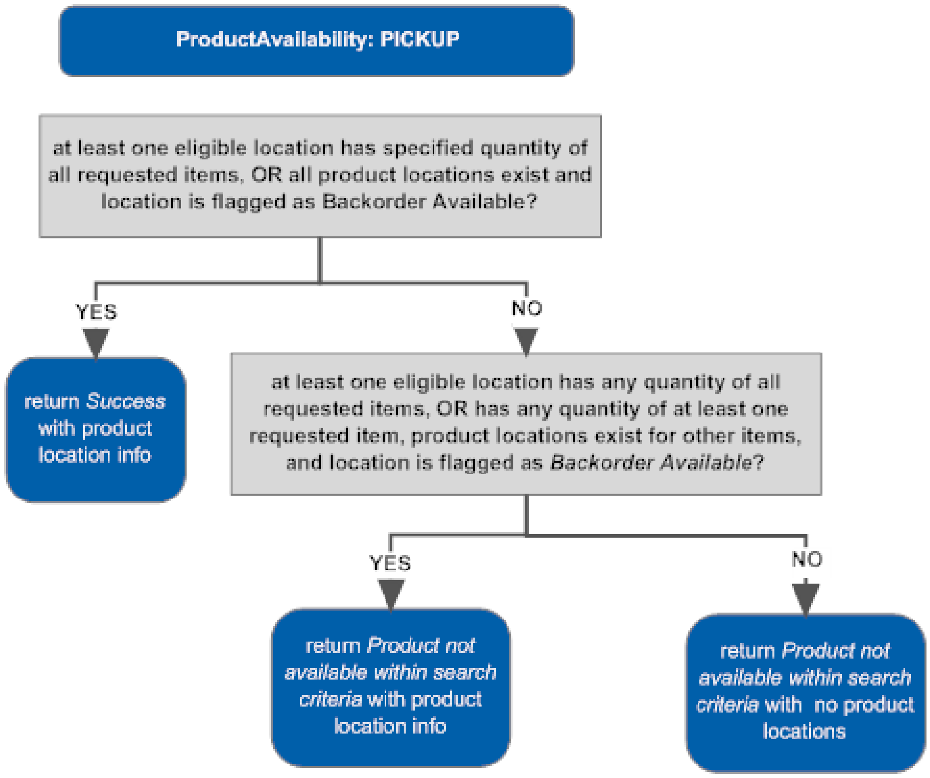
Product Availability Search: Pickup

When the Product Availability request specifies a PICKUP search type:

- If there is at least one eligible location that could fulfill the specified quantities of all requested items, or are flagged as Backorder Available, the `response_description` is `Success,` and the response includes details on the product location(s).
- if there are no eligible locations that could fulfill partial quantities or are flagged as Backorder Available, the `response_description` is `Product not available within search criteria`, and the response does not include any product locations.
- If there is at least one eligible location that could fulfill partial quantities of all requested items, or that stock the item and are flagged as Backorder Available, the `response_description` is `Product not available within search criteria`, and the response includes details on the product location(s).

  Example: The search request specifies item A with a quantity of 5, and item B with a quantity of 10. The `response_description` is `Product not available within search criteria`, and the response includes details on a location that has:
  - 5 of item A (full quantity) and 9 of item B (partial quantity)
  - 1 of item A (partial quantity) and 1 of item B (partial quantity)
  - 5 of item A (full quantity) and none of item B, but is flagged as Backorder Available

> **Note:**
>
> The Maximum No. Responses setting at the **Preferences** screen does not limit the number of locations returned when the product availability type is PICKUP, and the sort order is not based on the Order Broker criteria specified at the **Preferences** screen or through the **Order Broker Preference Overrides** screen.



Product Availability Search: Delivery/Single Item

> **Note:**
>
> Determining whether a ship-for-pickup order can be sourced is very similar. See *About Ship-for-Pickup Orders* for key differences.

When the Product Availability request specifies a DELIVERY search type for a single item, the Product Availability response message includes a `response_description` of SUCCESS, and does not indicate a `maximum_quantity`, if:

- there is at least one eligible location that could fulfill the specified quantity of the requested item, or
- the requested quantity could be fulfilled by splitting the line across multiple eligible locations, and the Use Split Line preference is set to *Yes*, or
- there is at least one eligible location that is flagged as Backorder Available

Otherwise, the response message indicates `Product not available within search criteria`, and specifies the `maximum_available` quantity of the item. The `maximum_available` quantity is:

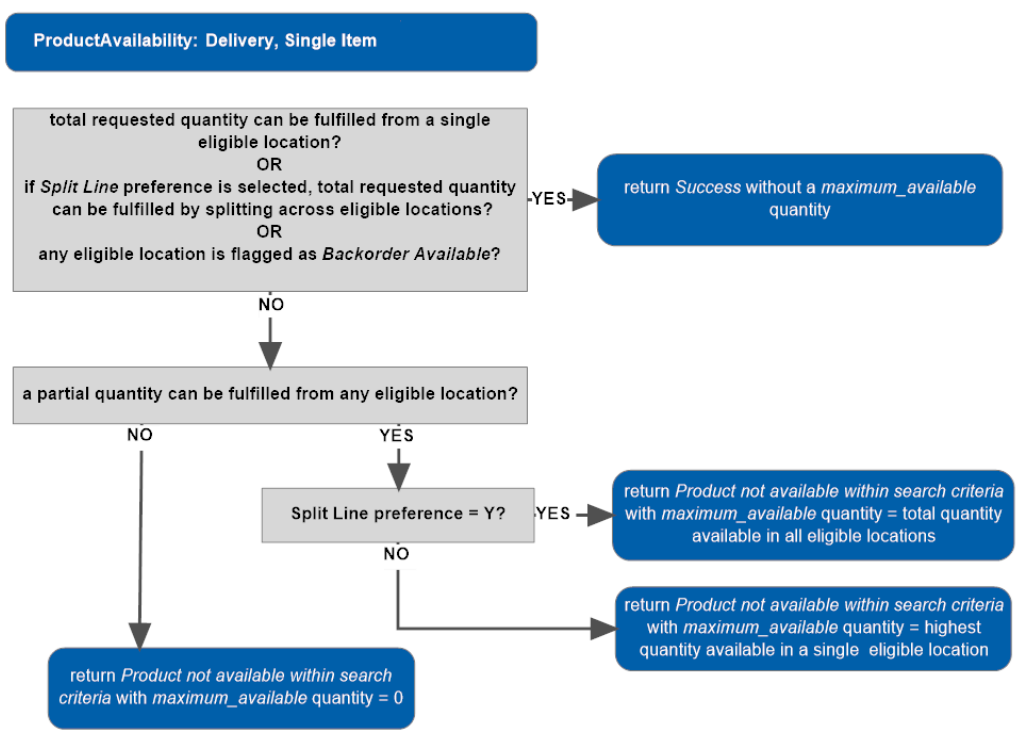
- the total available quantity across all eligible locations if the Use Split Line preference is set to *Yes*; otherwise,
- the highest available quantity for any eligible location.

If there are no eligible locations with a quantity available, the `maximum_available` is 0.

If Use Weighted Brokering Rules is selected, the Routing Engine uses the Science Engine to obtain this information; otherwise, the Routing Engine obtains the information.

Examples: If item AB100, quantity 10 requested:

Scenario	Result
Eligible locations include: • location A, 11 available, OR • location B, 5 available, and location C, 6 available, and Use Split Line = Yes, OR • location C, 2 available, and Backorder Available preference applies to location	response_description: Success maximum_available: not indicated
Eligible locations include: • location A, 2 available • location B, 1 available Neither location A or location B flagged as Backorder Available	response_description = Product not available within search criteria If Use Split Line = • Yes: maximum_available = 3 • No: maximum_available = 2
Eligible locations include: • location A, 2 available • location B, 0 available, but flagged as Backorder Available	response_description: Success maximum_available: not indicated
No eligible locations have any available quantity or are flagged as Backorder Available	response_description = Product not available within search criteria maximum_available: 0



Product Availability Search: Delivery/Multiple Items and Split Order = No

> **Note:**
>
> Determining whether a ship-for-pickup order can be sourced is very similar. See *About Ship-for-Pickup Orders* for key differences.

When the Product Availability request specifies a DELIVERY search type for multiple items and the Use Split Order preference is set to *No*, the Product Availability response message includes a `response_description` of SUCCESS, if:

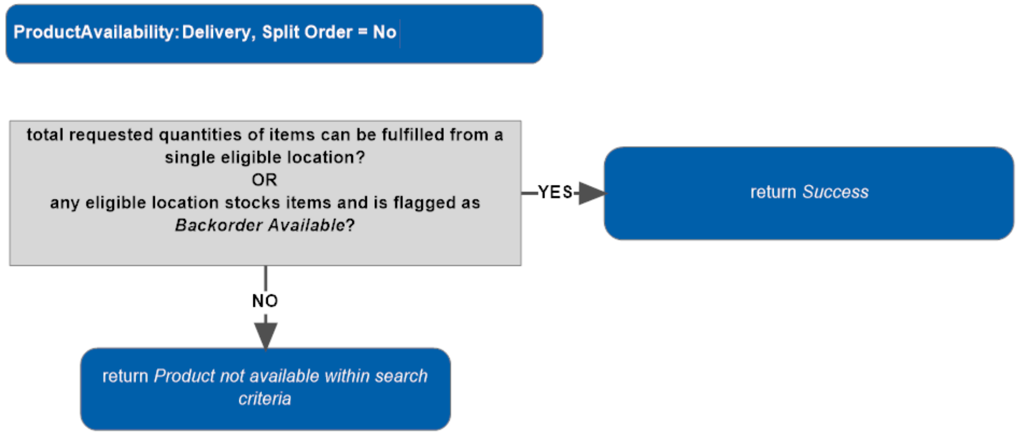
- there is at least one eligible location that could fulfill the specified quantities of all the requested items, or
- there is at least one eligible location that stocks all the requested items and is flagged as Backorder Available

Otherwise, the response message indicates `Product not available within search criteria`.

Maximum_available never returned: Regardless of whether the response message indicates `Success` or `Product not available within search criteria`, when the Product Availability request specifies a DELIVERY search type for multiple items and the Use Split Order preference is set to *No*, the Product Availability response message never includes the maximum_available for the items.

Examples: If item AB100 and item CD200, quantity 10 each requested:

Scenario	Result
Eligible locations include location A: • AB100: 15 available • CD200: 11 available Location A can fulfill the requested quantities.	response_description: Success
Eligible locations include: • location A: – AB100: 15 available – CD200: 3 available • location B: – AB100: 0 available – CD200: 16 No single location can fulfill the requested quantities.	response_description = Product not available within search criteria
Eligible locations include location A, flagged as Backorder Available: • AB100: 3 available • CD200: 0 available Although the location does not have sufficient inventory to fulfill the requested quantities, it is flagged as Backorder Available.	response_description: Success



Product Availability Search: Delivery/Multiple Items and Split Order = Yes

> **Note:**
>
> Determining whether a ship-for-pickup order can be sourced is very similar. See *About Ship-for-Pickup Orders* for key differences.

When the Product Availability request specifies a DELIVERY search type for multiple items and the Use Split Order preference is set to *Yes*, the Product Availability response message includes a `response_description` of SUCCESS, and does not indicate a `maximum_quantity` for any items, if:

- there is at least one eligible location that could fulfill the specified quantities of the requested items, or
- the requested quantities of the items could be fulfilled by splitting the order across multiple eligible locations, or by splitting any of the lines across multiple eligible locations if the Use Split Line preference is set to *Yes*, or
- any of the items that could not have their requested quantities fulfilled by eligible locations as described above are stocked in eligible locations that are flagged as Backorder Available

Otherwise, the response message indicates `Product not available within search criteria`, and specifies the `maximum_available` quantity of the item.

What does the maximum_available represent? When the full quantities are not available for all requested items and the Use Split Order preference is set to *Yes*, the `maximum_available` quantity is determined as follows:

- If a full or partial quantity of one or more items is available across all eligible locations:
  - if the Use Split Line preference is set to *Yes*, the `maximum_available` is the total available quantity for the item across all eligible locations
  - otherwise, if the Use Split Line preference is set to *No*, the `maximum_available` quantity is the highest available quantity in any single eligible location

- if a partial quantity of one or more items is available across all eligible locations, and one or more items are not available:
  - if the unavailable item(s) are stocked in any eligible locations flagged as Backorder Available, the `maximum_available` quantity for the unavailable item(s) is the requested quantity; otherwise,
  - the `maximum_available` quantity for unavailable items is `0`.

Examples: If item AB100 and item CD200, quantity 10 each requested:

Scenario	Result
Eligible locations include location A: • AB100: 15 available • CD200: 11 available	response_description: Success no maximum_available indicated Location A can fulfill the requested quantities.

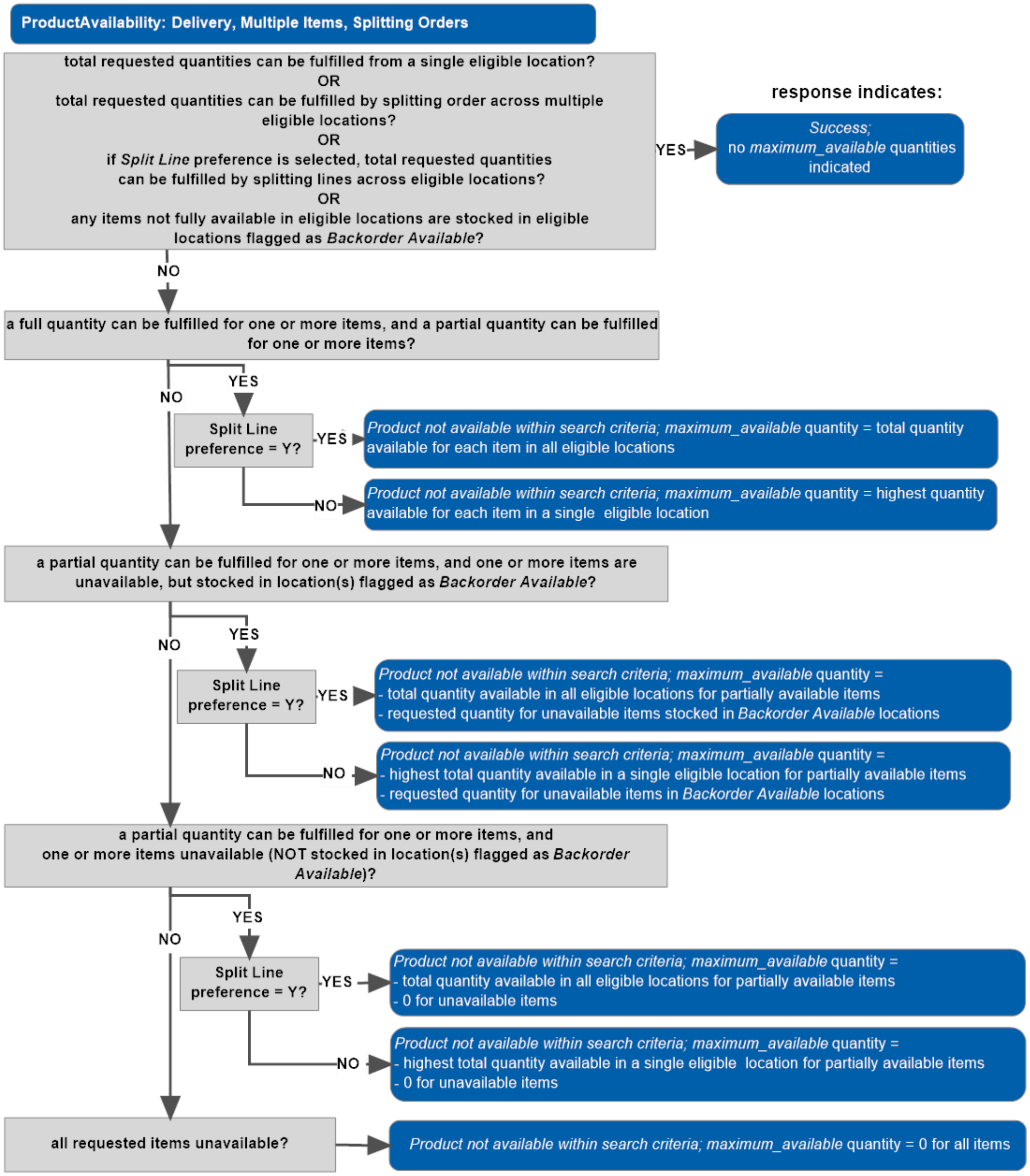
Eligible locations include:
• location A:
  – AB100: 15 available
  – CD200: 3 available
• location B:
  – AB100: 0 available
  – CD200: 16
	response_description: Success
	no maximum_available indicated
	Order can be split across location A and location B.

Eligible locations include location:
• location A:
  – AB100: 14 available
  – CD200: 0 available
• location B, flagged as Backorder Available:
  – AB100: 0 available
  – CD200: 0 available
	response_description: Success
	no maximum_available indicated
	Although no eligible locations have sufficient inventory to fulfill the requested quantity of CD200, location B stocks CD200 and is flagged as Backorder Available.

The Use Split Line preference = *Yes*, and eligible locations include:
• location A:
  – AB100: 12 available
  –
  – CD200: 4 available
• location B:
  – AB100: 2 available
  – CD200: 3 available
• location C:
  – AB100 15 available
  – CD200: 4 available
	response_description: Success
	no maximum_available indicated
	The second line can split across multiple locations if the Use Split Line = *Yes*.

The Use Split Line preference = *No*, and eligible locations include:
• location A:
  – AB100: 7 available
  – CD200: 12 available
• location B:
  – AB100: 4 available
  – CD200: 2 available
	response_description: Product not available within search criteria
	maximum_available:
	• AB100: 7
	• CD200: 12
	The first line cannot split across locations if the Use Split Line preference = *No*. The `maximum_available` is the highest available quantity in a single eligible location.

Scenario	Result
The Use Split Line preference = *Yes*, and eligible locations include: • location A: – AB100: 5 available – CD200: 6 available • location B: – AB100: 4 available CD200: 2 available	response_description: Product not available within search criteria maximum_available: • AB100: 9 CD200: 8 Only partial quantities are available for both items. The `maximum_available` is the highest available quantity in a single eligible location, since the Use Split Line preference = *Yes*.
Eligible locations include: • location A: – AB100: 8 available – CD200: 7 available • location B, flagged as Backorder Available: – AB100: not stocked (no product location record) – CD200: 0 available	response_description: Product not available within search criteria maximum_available: • AB100: 8 CD200: 10 The maximum_available = the requested quantity if the location is flagged as Backorder Available and one or more other requested items has only a partial quantity available.



About Ship-for-Pickup Orders

> **Important:**
>
> When you create a new organization in Order Broker 20.0 or higher, ship for pickup orders are automatically enabled, and in this case retail pickup and ship-to-store orders are not supported. When you update to Order Broker 21.0 or higher, ship for pickup orders are automatically enabled in all existing orders, and in this case retail pickup and ship-to-store orders are converted to ship-for-pickup orders.

What is a ship for pickup order? A ship for pickup order is one that the customer picks up at a specified location, and that can be sourced by either the placing location, the pickup location, or a third location. For example:

- order placed in location A, inventory sourced from location B, and customer picks up in location C
- order placed in location D, inventory sourced from location E, and customer picks up in location D
- order placed in location F, inventory sourced from location F, and customer picks up in location G
- order placed in location H, inventory sourced from location J, and customer picks up in location J

See *Ship For Pickup Order* for illustrations of possible order flows.

Typical ship for pickup order flow:

- Pickup location selected: The customer selects a location for order pickup.
- Inventory available? The placing location confirms that the inventory can be sourced.

> **Note:**
>
> The ProductAvailability message can be used both to search for pickup locations and to confirm that the merchandise is available for sourcing, given the fulfillment rules set up for the organization, including proximity, location zones, split order/line options, and probability rules. The LocateItems request can also search for sourcing locations, but does not support searching for pickup locations for ship-for-pickup orders.

- Order created: The order is created, and the pickup location specified. Optionally, the SubmitOrder request can also specify the sourcing location, or the Routing Engine can select it.
- Sourcing location notified? If the sourcing location is different from the placing location, the sourcing location receives notification of the order through the Fulfillments response message.

  Sourcing location ships to pickup location? If the sourcing location is different from the pickup location:

  – The sourcing location updates the status to Intransit when the order ships.

  – The pickup location receives notification of the order through the Intransit response message. This message is similar to the fulfillments response message, but includes only ship-for-pickup orders that are in transit to the selected pickup location.

  – The pickup location receives the order.
- Order fulfilled: When the customer picks up the order, the pickup location updates the status to Fulfilled.

Can the pickup location reject the order? If the pickup location rejects the order, this indicates that there was a problem with the transfer from the sourcing location, such as a damaged or missing shipment. As a result, the Routing Engine “reshops” the order.

> **Note:**
>
> **Important:** Before converting an existing organization to support ship-for-pickup orders, confirm that all integrating systems can also support ship-for-pickup orders.

Using LocateItems to Find a Sourcing Location for Ship-For-Pickup

When a LocateItems request specifies a fulfillment type of SHIPFORPICKUP, it also needs to specify the location where the customer wants to pick up the order. In this situation, the LocateItems request serves to confirm that the inventory is available for sourcing. Both the requesting location and the pickup location can be included in the search results if they have the requested inventory available and are otherwise eligible, since they can also serve as the sourcing location for a ship-for-pickup order.

Example: The LocateItems request requests availability for an item, with the ship-for-pickup location A. The response includes locations A, B, and C, indicating that location A can be both the sourcing location and the pickup location.

Potential sourcing locations must be flagged as Ship For Pickup Sourcing Available, based on the setting at the Preferences screen.

When calculating proximity, the Routing Engine uses the ship-for-pickup location specified in the LocateItems request message and the Sourcing Distance specified at the **Preferences** screen. The distance passed in the LocateItems request is not used.

Gift wrap? If the `gift_wrap` tag in the request is set to Y and the *Use Attribute Rules* flag is selected at the **Preferences** screen, only locations that are flagged to support gift wrap are eligible as pickup locations for the pickup order. The sourcing location for a ship-for-pickup order does not need to support gift wrap.

Custom product or location attributes? See *Using Attribute Rules for Ship-for-Pickup Orders* for a discussion on how you can use custom attributes to filter eligible locations.

Aside from these differences, using LocateItems to find a sourcing location is the same as the process described under *Selecting a Location for a Delivery Order*.

The LocateItems request does not support searching for pickup locations for a ship-for-pickup order. The ProductAvailability request should be used instead to generate a list of locations eligible for pickup or ship-for-pickup orders, as well as indicating whether the merchandise is available for sourcing.

Using Product Availability Search for a Ship-for-Pickup Order

When the ProductAvailability request specifies a fulfillment type of SHIPFORPICKUP, the response indicates:

- whether the requested inventory is available for sourcing, and
- the eligible pickup locations, excluding potential pickup locations if there is no existing system product for the system

In many respects, the product availability search for a ship-for-pickup order is similar to searching for delivery orders. The key differences are described below.

Selecting a Sourcing Location for a Ship-for-Pickup Order

The ProductAvailability search uses the following rules when searching for sourcing locations:

- Potential sourcing locations are identified based on the Ship For Pickup Sourcing Available setting at the Preferences screen.
- The Sourcing Distance specified at the Preferences screen always applies when searching for a sourcing location. The range_distance from the product availability request applies only when selecting the list of eligible pickup locations. When calculating proximity for the sourcing location, the Routing Engine uses the address specified in the ProductAvailability request message.
- Both the requesting (placing) location and the pickup location are evaluated as potential sourcing locations.
- If the requested item(s) are not available for sourcing in the full requested or partial quantity(ies), no pickup locations are returned in the response.
- *Selecting a Pickup Location for a Ship-For-Pickup Order*

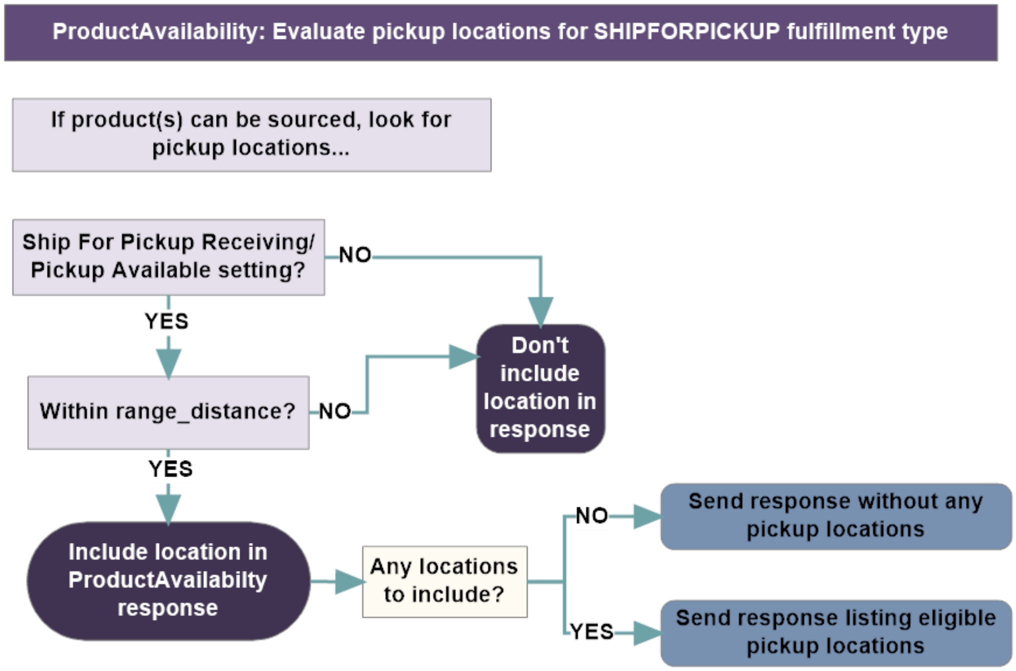
The submit order message for a ship-for-pickup order needs to specify the pickup location and system. You can use the product availability message to request a listing of locations that should be able for pickup of a ship-for-pickup order near the customer’s location. A system product must exist in the potential pickup location’s system.

Sourcing Scenario	Example
Is the requested item available for sourcing? In order for the product availability response to include any eligible pickup locations, it is necessary for at least a partial quantity of the requested item be available at an eligible sourcing location. If there is more than one item specified in the request, then at least one of the items must be at least partially available. **Which locations are eligible to be pickup locations for a ship-for-pickup order?** A ship-for-pickup order means that the customer will pick up the product(s) in a location where the inventory might already be available, or it might need to be transferred from a different location. If the product availability request message indicates that the fulfillment type is a ship-for-pickup: • The response message lists each location which is flagged as Ship For Pickup Receiving/Pickup Available and is within the specified range distance of the customer's address. The response message also indicates whether the full requested quantity(ies) of the specified product(s) are available at any eligible sourcing locations. • Once the customer specifies the location where s/he would like to pick up the product(s), you can then send the SubmitOrder request message, providing the customer information, requested products, and selected pickup location.	*Example:* A customer wants to pick up an item at a nearby store. The ProductAvailability request indicates: • the item (AB100 in a quantity of 5) • the customer's address, including the postal code where the (01581) • the distance (in miles or kilometers) that the customer is willing to travel (15 miles) Provided the full requested quantity of AB100 is available at any sourcing locations, the ProductAvailability response returns a description of Success, indicating that the item can be sourced, and lists: • store location 23: 10.72 miles from the customer • store location 57: 13.51 miles from the customer If only 4 units of the product are available, the response indicates `Product not available within search criteria`, and lists the `maximum_available` quantity of 4.

If the placed (originating) location is specified as the sourcing location: The SubmitOrder message can indicate a sourcing location that is the same as the placed (originating) location. In this situation:

- The Routing Engine does not search for a sourcing location.
- The Routing Engine does not confirm that the inventory is available at the placed/ sourcing location.
- The Reserved Quantity is not increased.
- The order count is not increased for calculation of Maximum Daily Orders.
- The order is not included in the fulfillments response message to the placed/sourcing location.

If the sourcing location is not specified in the request, it is possible for the Routing Engine to select the placed location to source the order. In this situation, the Routing Engine treats the order the same way as any other ship-for-pickup order; for example, the Reserved Quantity is increased, the order count is increased, and the order is included in the fulfillments response message.



Aside from these differences, using the ProductAvailability request to find availability and pickup locations for a ship-for-pickup order is the same as the process described under *Using Product Availability Search for a Pickup or Delivery Order*.

Using Attribute Rules for Ship-for-Pickup Orders

You can set up custom attributes to filter the locations eligible to source orders, or where orders can be picked up.

Custom attributes are used only if *Use Attribute Rules* is selected at the **Preferences** screen.

These rules apply when filtering locations for LocateItems, ProductAvailability, and SubmitOrder requests. They also apply when “reshopping” orders as a result of a StatusUpdate request or when the order is rejected through the user interface. If there have been any changes to the attribute assignments to locations or the product since the order line was created, the current attribute assignments apply.

Note:

This setting also controls whether to filter pickup locations when gift wrap is required.

Examples:

Attribute Usage	How to Implement
Product A always requires engraving, so only locations that support engraving can fulfill orders for this product.	*Setup:* • Create a custom attribute: – Attribute Type: *Product and Location* – Data Type: *Boolean* – Ship For Pickup Match Type: Set to *Sourcing* if engraving is performed at sourcing locations for ship-for-pickup orders, or set to *Pickup* of engraving is performed at pickup locations for ship-for-pickup orders • Assign the engraving attribute to product A • Assign the attribute to each location that supports engraving: – Set Location Use to *Sourcing* for locations that can fulfill delivery orders or source ship-for-pickup orders, if your business process includes applying engraving in the sourcing location – Set Location Use to *Pickup* for locations that can fulfill pickup orders or where customers can pick up ship-for-pickup orders, if your business process includes applying engraving at the pickup location *Web service responses:* The LocateItems response, ProductAvailability response, and SubmitOrder response automatically filter locations to those that support engraving based on the attribute assignment.
Product B is eligible for engraving, but can also be ordered without it. The individual request for the product indicates whether engraving is required.	*Setup:* • Create a custom attribute: – Attribute Type: *Product and Location* – Data Type: *Boolean* – Ship For Pickup Match Type: Set to *Sourcing* if engraving is performed at sourcing locations for ship-for-pickup orders, or set to *Pickup* if engraving is performed at pickup locations for ship-for-pickup orders • Do not assign the attribute to product B. • Assign the attribute to each location that supports engraving: – Set Location Use to *Sourcing* for locations that can fulfill delivery orders or source ship-for-pickup orders, if your business process includes applying engraving in the sourcing location – Set Location Use to *Pickup* for locations that can fulfill pickup orders or where customers can pick up ship-for-pickup orders, if your business process includes applying engraving at the pickup location *Web service requests:* The LocateItems request, ProductAvailability request, SubmitOrder request should include the custom attribute only when engraving is required. *Web service responses:* The LocateItems response, ProductAvailability response, and SubmitOrder response automatically filter locations to those that support engraving based on the attribute assignment.

<table>
<tr><th>Attribute Usage</th><th>How to Implement</th></tr>
<tr><td>Location 100 is associated with brand ABC. Your organization includes store locations associated with multiple brands, but only locations that are associated with Brand ABC can serve as pickup locations orders for the brand. The sourcing location does not need to be associated with the originating brand.</td><td>Setup:
• Create a custom attribute:
– Attribute Type: Location
* Data Type: List
* Ship For Pickup Match Type: Set to Pickup
* List Values: All possible brands for your organization
* Allow Multiple: Selected
• Assign the attribute value of each supported brand to each location that can originate or serve as a pickup location for orders.
– Location 100: Orders originating here are always associated with brand ABC. Assigned a Value of ABC with a Location Use of Originating.
– Location 200: Supports pickup of orders for brands ABC and DEF. Assigned Values of ABC and DEF, both with a Location Use of Pickup.
– Location 300: Supports pickup of orders for brand ABC. Assigned a Value of ABC with a Location Use of Pickup.
Web service responses: The LocateItems response, ProductAvailability response, SubmitOrder response filter eligible locations to Location 200 and Location 300, because they are both assigned a Value of ABC with a Location Use of Pickup.

Note:
The same results would occur if, instead of assigning the brand attribute with a Value of ABC and a Location Use of Originating to location 100, the brand attribute was passed in the request message with a value of ABC.</td></tr>
</table>

Attribute setup options: You can use the following options when setting up attribute definitions:

- Attribute Type: Attributes can filter eligible locations based on:
  - *Location and Product:* The location must be consistent with an attribute defined for the product. The attribute might be a universal requirement, such as the engraving required example above, or specified on a case-by-case basis, such as the optional engraving example.
  - *Location:* The location must be consistent with an attribute defined for the originating location. The requirement applies to the pickup location for a pickup and to the sourcing location for a delivery order. For a ship-for-pickup order, the requirement can apply to the sourcing location, the pickup location, or both, based on the Ship For Pickup Match Type set for the attribute definition.
  - *Product Type:* Although you can create attributes with an Attribute Type of Product, these attributes are informational only and not used to route orders.
    - Data Type: Possible attribute data types are:
    - *Boolean:* The attribute is used to route orders if the Boolean is assigned to the product or originating location, such as the engraving examples above.

An assigned Boolean is interpreted as True. Negative Boolean attributes are not supported.

    * *List:* Defines a list of valid values, such as the brand example above. When the attribute is used to route orders, there must be a match with one of the list values.
    * *Text:* Similar to the *List* data type, except it is not validated against a defined list of values.
    * *Number:* Similar to the *List* data type, except it is not validated against a defined list of values, and must be numeric.
  – Allow Multiple:
    * *Locations:* Controls whether the attribute can be assigned more than once to a single location with different values and the same Location Use (*Originating*, *Sourcing*, or *Pickup*). For example, a location can support multiple brands. Even if the attribute is set to not allow multiples, a different attribute value can be assigned to the location for each different location use; for example, a location can support engraving when it is a sourcing location, but not when it is a pickup location. Regardless of the Allow Multiple setting, only a single value can be assigned to a location when the Location Use is **Originating**.
    * *Products:* Controls whether the attribute can be assigned more than once with different values to the same product.

      The Allow Multiple setting does not apply to Boolean attributes, and cannot be selected.
  – Ship For Pickup Match Type: Controls whether the attribute needs to match the sourcing location, the pickup location, or both the sourcing and the pickup location for a ship-for-pickup order. Does not apply to delivery or pickup orders.

Filter based on multiple attributes? It is possible for multiple location, or product and location attributes to filter eligible locations. For example, one attribute can filter locations that do not support engraving, while another attribute can filter locations based on brand. All attributes apply, regardless of whether:

- They have been assigned to the product or any potential sourcing or pickup locations;
- They are passed in the LocateItems, ProductAvailability, or SubmitOrder request message;
-
- They were initially applied to the order line at the time that it was created, and it is now being “reshopped.”

A location is excluded if it does not qualify based on all location or product and location attributes. For example, the *Brand* attribute is applied to location 1 with a Location Use of *Originating* and a value of *ABC*, and a LocateItems request from location 1 with a *Pickup* fulfillment type passes the *Brand* attribute with a value of brand *DEF*. Only locations that are assigned both *ABC* and *DEF* with a Location Use of *Pickup* can be eligible as pickup locations.

Considerations for Upgrade to 21.0

If ship-for-pickup orders were not previously enabled in your organization prior to the 21.0 update:

- *Integrating systems must support ship-for-pickup:* Do not upgrade to 21.0 if any integrating systems do not support a third location besides the originating (placed) location and the pickup location.
- *Existing orders permanently converted*: When ship-for-pickup orders are enabled, all delivery and ship-for-pickup orders are converted to ship-for-pickup orders, and cannot be changed back.
- *Reset fulfillment options:* After ship-for-pickup orders are enabled, you need to use the Preferences screen to set the options at the Fulfillment tab, including the Sourcing Distance. You can also use the Order Broker Preference Overrides screens to set up overrides.
- *Reschedule reports:* After converting an existing organization to support ship-for-pickup orders, you should recreate any currently scheduled Order Status or Unfulfillable reports.
- *Ship-to-store orders and Store Connect use:*

  If you previously processed ship-to-store orders and use Store Connect, these orders will be converted to ship-for-pickup orders, which cannot be fulfilled through the Store Connect user interface.

Additional Differences When Ship-For-Pickup is Enabled

Additional web service and screen differences to note when ship-for-pickup orders are enabled in an organization are described below.

Routing Engine Setup for Ship-For-Pickup

When ship-for-pickup orders are enabled, the Fulfillment tab of the organization’s Preferences screen includes:

- Sourcing Distance: Indicates the maximum distance a potential routing location can be, based on:
  - the ship-for-pickup location, if specified (LocateItems request, SubmitOrder request, or “reshop”), or
  - the address specified in the Product Availability request
- Ship For Pickup Sourcing Available: Controls whether a location is eligible to source a ship-for-pickup order
- Ship For Pickup Receiving/Pickup Available: Controls whether a location is eligible to be a pickup location for a ship-for-pickup order

These last two options replace the Retail Pickup Available and Ship To Store Available options when ship-for-pickup orders are enabled or after the 21.0 update. These differences also apply to the **Order Broker Preference Overrides** screens.

Aside from these differences, Routing Engine logic works the same way when selecting a sourcing location for a ship-for-pickup order as it works when selecting a fulfilling location for a delivery order. All the brokering settings, such as split order, zone fulfillment, acknowledging orders before brokering, and probability apply the same way for ship-for-pickup processing as they would for any other type of order.

SubmitOrders

When the SubmitOrder message specifies a fulfillment type of SHIPFORPICKUP, it also needs to specify the pickup location for the order. It can also include the sourcing location. If no sourcing location is specified in the message, the Routing Engine “shops” the order as described above and selects the sourcing location.

Fulfillments

The fulfillments response message includes orders only when the request is from the sourcing location. The pickup location receives notification of incoming orders from the Intransit response.

Intransit

This web service request resembles fulfillments request processing, but serves only to notify pickup locations about ship-for-pickup order that are in transit.

Other Web Service Differences

Fulfillments response, status inquiry response, status list response, order search response: These response messages indicate the pickup locations for ship-for-pickup orders.

Screen Differences

Certain screens display different options based on whether ship-for-pickup orders are supported:

- Preferences screen: Options available at the Fulfillment tab vary, as described above.
- Order Broker Preference Overrides: Different order types are available to configure based on whether ship-for-pickup is supported.
- Run Reports, Schedule Report: The sourced location is available for selection when generating the Order Status report, and the report includes the sourced location.
- Order Inquiry: When ship-for-pickup orders are enabled for an organization, the **Order Inquiry** screen has the Locations column broken out into three columns to indicate the Placed Location, Sourced Location, and Pickup Location. The search criteria also vary from those displayed for an organization that does not support ship-for-pickup orders. Similar differences apply to the **Order** screen and the **Edit Order Item** and **Display Order Item** windows.

Troubleshooting Fulfillment or Sourcing Location Selection

Because there are various factors that can affect how the Routing Engine eliminates potential locations from selection as fulfilling locations (order “shopping”), you can use the Trace Shopping Log screen as needed tor research shopping logic and resolve questions. This screen provides a listing of the potential product locations for an order, and indicates the reason, if any, why each location is eliminated, including:

- Not supporting the order type
- Not having sufficient inventory
- Probability rule
- Maximum order limit
- Zone fulfillment
- Proximity distance
- Shopping within system not allowed
- Not supporting gift wrap
- Attribute incompatibility

> **Note:**
>
> Oracle recommends that you turn on shopping logic tracing to research questions related to how the routing engine is selected locations, but to otherwise keep tracing turned off in order to enhance system performance.

For more information: See the *Trace Shopping Log* screen for a discussion and more details.

Routing Engine Message Summary

Overview: The request and response messages that support the Routing Engine are briefly summarized below. See the *Operations Guide* for links to detailed information on each message, including layouts, sample messages, and message contents.

LocateItems: These messages are part of the typical flow for creating pickup orders. Their use is optional for creating other types of orders, because the Routing Engine uses the same steps to select a location for a delivery order or the sourcing location for a ship-for-pickup order as it uses to create the response to the LocateItems request.

- *Request:* Look for locations that should be able to fulfill a pickup or other type of order, or source a ship-for-pickup order, for one or more items. Includes information on the customer's location or ship-for-pickup location for proximity purposes.
- *Response:* Lists the location(s) that should be able to fulfill or source the product(s) specified in the request message. Based on your Order Broker settings at the *Preferences* screen, the response for a delivery or ship-for-pickup request can list information on individual locations, or just indicate that the product(s) can be shipped.

Product Availability (multiple fulfillment types): Request availability information for one or more items and one or more fulfillment types (delivery, pickup, or ship-for-pickup):

- *Request:* Look for locations that should be able to fulfill a pickup order or where the customer could pickup up a ship-for-pickup order, or confirm whether a delivery, or ship-for-pickup order could be fulfilled or sourced. Includes information on the customer's location for proximity purposes.
- *Response:* Lists the location(s) that should be able to fulfill the product(s) specified in the request message for a pickup order, or whether a delivery, or ship-for-pickup order could be fulfilled or sourced.

SubmitOrder: Requests creation of the order and might also request assignment of a fulfilling or sourcing location, depending on the order type. See *Types of Orders* for more information.

- *Request:* Includes information such as:
  - the requesting location and system
  - the requesting system's order number
  - requested item(s), quantities, prices, and tax charges
  - name and address of the sold-to customer

- for a pickup order, the location where the customer will pick up the order
- for a delivery or ship-for-pickup order, shipping address information
- order total and subtotal amounts
- optionally, special instructions
- optionally, tender amounts and other information (**Note:** The message should not include the actual credit card account number.)

- *Response:* Once it has created the order, the Routing Engine sends a simple response message acknowledging the order, confirming the fulfilling or sourcing location and system, and indicating the request ID it has assigned to uniquely identify the order.

Fulfillments (polling for new orders): Each location that might need to fulfill or source any orders needs to poll the Routing Engine periodically for any newly assigned orders or lines. Alternatively, a system can submit a fulfillment request to poll for orders assigned to all its related locations.

- *Request:* A location or system identifies itself in order to request a listing of newly-assigned orders.
- *Response:* Lists details on the order, such as customer name and address, order type (pickup, delivery, or ship-for-pickup), requested items and quantities, and special order messages. If the Require Status Update flag for the location's system is unselected, then the Routing Engine sends each order just once to the fulfilling or sourcing location and does not require confirmation. See *Require Status Update for Assigned Orders?* below for a discussion.

Intransit (polling for ship-for-pickup orders in transit to pickup location): Each location that might receive any ship-for-pickup orders for customer pickup needs to poll the Routing Engine periodically for any in transit orders or lines. Alternatively, a system can submit an intransit request to poll for orders in transit to all its related locations.

- *Request:* A location or system identifies itself in order to request a listing of in transit ship-for-pickup orders.
- *Response:* Lists details on the order, such as customer name and address, requested items and quantities, and special order messages. If the Require Status Update flag for the location's system is unselected, then the Routing Engine sends each order just once to the pickup location and does not require confirmation. See *Require Status Update for Assigned Orders?* below for a discussion.

StatusUpdate: Change the status of an existing order or line. Any location can send a status update to the Routing Engine, including the originating location and the fulfilling, sourcing, and pickup location; however, certain status updates are restricted to the fulfilling, sourcing, or pickup location.

- *Request:* Identifies the requesting system and location, the order or line, and the new status to assign. Status updates apply at the order level if the Allow Split Order preference is unselected; otherwise, they apply at the line level. Also, status updates must specify the quantity to update if the Allow Partial Updates preference is selected.
- *Response:* Indicates whether the status update was successful.

> **Important:**
>
> If the Allow Partial Updates preference is selected, before a system sends a status update, it should first send a status request message so that the status update correctly identifies the current Order Broker line number.

StatusRequest (order status inquiry): At any point in the order or fulfillment process, any location can send an order status inquiry request to the Routing Engine.

- *Request:* Provides the order ID and request ID that uniquely identify the order.
- *Response:* Indicates the current order and line statuses and the name and address of the sold-to customer.

OrderSearch (search for orders for a customer): At any point in the fulfillment process, any location can send an order search request to the Routing Engine.

- *Request:* Includes search criteria such as information on the sold-to customer or shipping address, including name, phone number, or email address. Can also specify a date, to request a list of orders created on or after that date.
- *Response:* Includes details on all orders that meet the search criteria.

Order Update (update the Under Review flag for an order): At any point in the fulfillment process, a system can update the setting of the *Under Review* flag, indicating whether the order is eligible for fulfillment:

- *Request:* Indicate the order to update and the setting of the Under Review flag.
- *Response:* Indicate whether the update was successful.

Order Status List (request the current status of a list of orders): At any point in the fulfillment process, a system can request the current status of a list of up to 2000 orders:

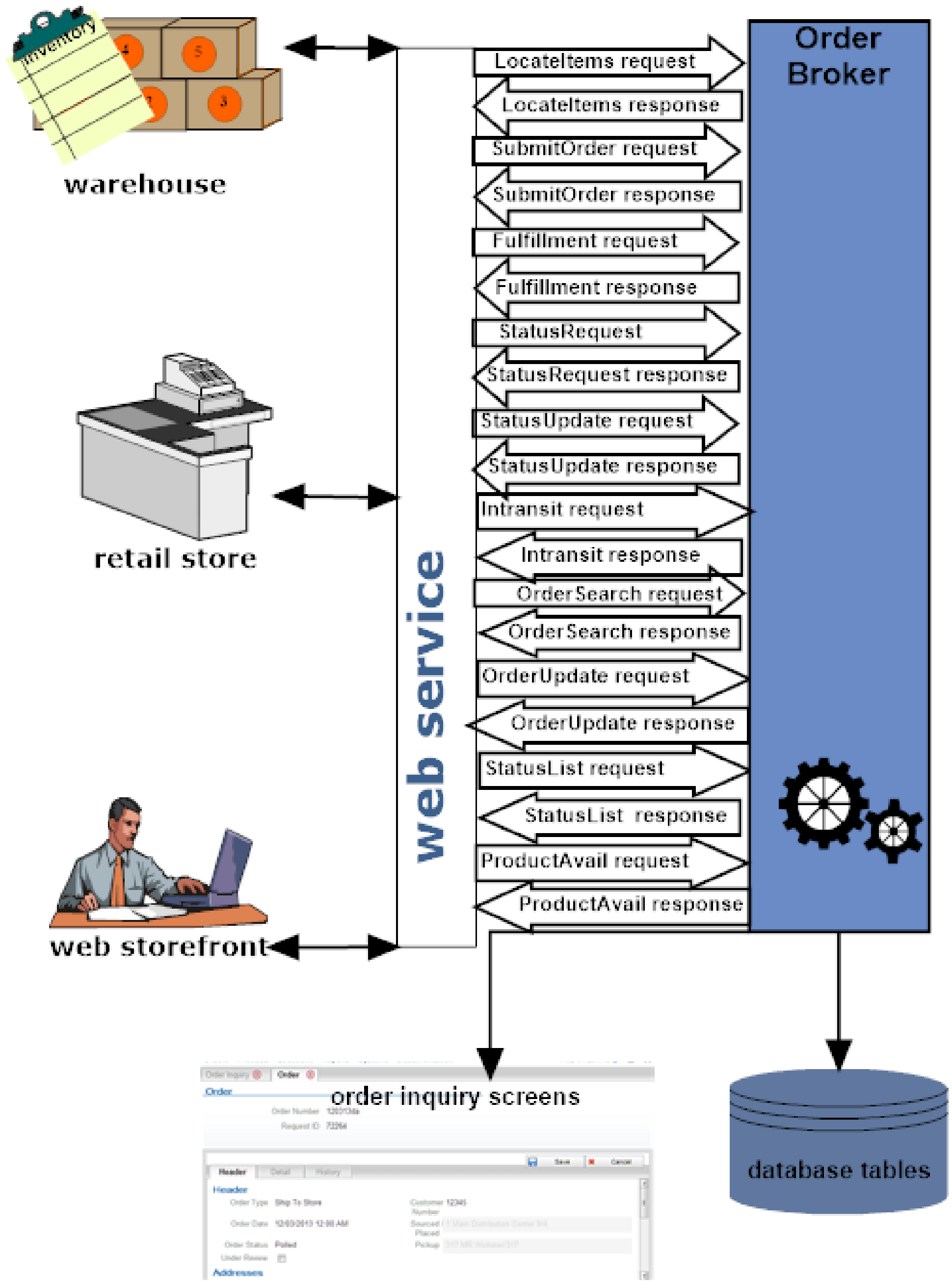
- *Request:* Request the current status of a list of orders by specifying the request IDs, and can optionally specify to include orders based on the status of the order lines.
- *Response:* Provides the status and other summary information about the requested orders.

Availability Update (change the current available quantity for a product location): At any point, the system can update the available quantity for one or more product locations:

- *Request:* Specifies whether to increase, decrease, or reset the available quantity for one or more product locations. If the product location does not already exist, it is created.
- *Response:* Indicates whether each product location was updated successfully.

For more information: See the Order Broker Operations Guide.

Message flow



Require Status Update for Assigned Orders?

Overview: The Require Status Update flag for a system controls the updates that take place for fulfillments response processing and intransit response processing.

> **Note:**
>
> A status update is not required to set the status to polled when you use *Order Fulfillment through RICS Integration*, regardless of the setting of the *Require Status Update* flag.

Fulfillments Response Message

Fulfilling or sourcing locations: You can specify whether the Routing Engine requires confirmation that an assigned fulfilling location, or sourcing location for a ship-for-pickup order, has been notified of an order or line included in the fulfillment response message. The Require Status Update flag setting for a system controls whether the confirmation is required.

If the Require Status Update flag is:

- Selected = the Routing Engine continues to include an order in the fulfillment response message to an assigned fulfilling or sourcing location or system, until the location or system sends a status update indicating that the order or order line is *polled* (all order types) or *accepted* (pickup, delivery, or ship-for-pickup orders). When the Routing Engine receives this status update, it flags the order or line as polled.

  Possible risk: With this setting, there is a potential risk that an order could be created twice in the integrating system if, for example, that system does not complete creating the new orders in the fulfillments response message and sending the status update messages for them before it sends a new fulfillments request message to Order Broker.
- Unselected = the Routing Engine includes each order or line just once in the fulfillment response message to an assigned fulfilling or sourcing location. If the order or line status was *new_order*, it changes the status to *polled*.

  Possible risk: With this setting, there is a potential risk that an order might not be created in the integrating system if, for example, the integrating system does not receive the fulfillments response, or fails to create all orders in the response.

Polling count: Each time the Routing Engine includes an order in the fulfillment response message, it increases the order line's Poll Count. Once an order's Poll Count exceeds the Polling Retries specified for the system, the order is eligible to be included in the *Order Broker Polling Status Email*, notifying the system administrator of unacknowledged orders for the location.

> **Note:**
>
> Until the order or lines are flagged as polled, the Routing Engine continues to include the order in the fulfillment response message even after it was included in the *Order Broker Polling Status Email*.

Splitting orders?

If the Allow Split Order preference is selected, each order line on a delivery order can be assigned to a different fulfilling location, or each order line on a ship-for-pickup order can be assigned to a different sourcing location, or be assigned at a different time. As a result, the Routing Engine evaluates the Poll Count of each order line separately, and does not send the *Order Broker Polling Status Email* unless an individual line exceeds the Polling Retries setting.

Example: The Polling Retries for a system is set to 5. If line 1 has a current Poll Count of 4 and line 2 has a Poll Count of 3, the Routing Engine does not include the order in the *Order Broker Polling Status Email*. However, if one of the lines has a current Poll Count of 6, the Routing Engine includes the order in the *Order Broker Polling Status Email*.

If the Allow Split Order preference is unselected, all order lines are assigned to the same fulfilling location, or sourcing location in the case of ship-for-pickup orders. In this case, the Poll Count of each order line is the same.

Example: The Polling Retries for a system is set to 5. If each line has a Poll Count of 4, the Routing Engine does not include the order in the *Order Broker Polling Status Email*. However, if each line has a Poll Count of 6, the Routing Engine includes the order in the *Order Broker Polling Status Email*.

Flagging an order or order line as polled vs. polled order status: Sending the status update flags the order or line as polled and prevents it from being included in future fulfillment response messages; however, this status update does not necessarily change the status to *polled*. For example, setting the status to *accepted* also serves to flag the order or line as polled and prevent it from being included in future fulfillment response messages.

Consistent setup in integrated system: It is important that the integrated system is set up consistently with the Require Status Update and related settings in Order Broker; otherwise, the integrated system might not send status update messages for newly assigned orders or lines, and the Routing Engine might continue to include the same orders or lines in the fulfillment response message, resulting in duplicate orders in the integrated system. For example, if the Require Status Update flag is selected for the Order Management System system in Order Broker, then the Re-Polling for Orders Brokered to OROMS (L04) system control value in Order Management System should also be selected.

Clearing the poll count: The Routing Engine resets the Poll Count to 0 if a fulfilling location rejects an order or order line, or if its status changes to *canceled*, *unfulfillable*, or *fulfilled*.

Order Broker Polling Status Email

The Routing Engine sends this email to the System Ops Email address specified for the system at the *Orders tab* on the *System* screen. The email lists each order with an order line whose Poll Count has exceeded the system's Polling Retries setting.

No email is generated for orders that exceed the Polling Retries setting based on the intransit response message.

The language used for the email is based on the Language specified for the organization, and the formatting of dates, times, and numbers is also based on the organization-level settings. See the *Organizations* screen for more information.

Different poll counts? If there are multiple order lines assigned to the fulfilling location, the order might be listed more than once when multiple lines exceed the Polling Retries setting based on different Poll Count totals.

Example:

- *Same poll count:* Order 123 includes line 1 and line 2. each with a Poll Count of 5. The email lists the order once with a Times Polled of 5.
- *Different poll counts:* Order 456 includes line 1 with a Poll Count of 5, and line 2 with a Poll Count of 6. The email lists the order twice, once with a Times Polled of 5, and once with a Times Polled of 6.

How often? The Routing Engine uses the number of minutes indicated for the *Email Notifications* job to determine how often to generate the email.

****ATTENTION****

The following orders have been sent multiple times and not confirmed as received.

System Code: cws(Store)

Date/Time : 10/21/2016 1:53:22 PM

Location	Request ID	Order #	Times Polled
317 Sample Loc	68866	7854	11
317 Sample Loc	68907	7857	10
317 Sample Loc	68913	7859	10
317 Sample Loc	68918	7861	9
317 Sample Loc	68918	7861	8

Please do not respond to this message.

--Order Broker

Intransit Response Message

Pickup locations: In addition to controlling the updates that take place for fulfilling and sourcing locations as a result of the fulfillments response message, the Require Status Update flag also controls the updates that take place for pickup locations as a result of the intransit response message. This message is used only for ship-for-pickup order types.

If the Require Status Update flag is:

- Selected = the Routing Engine continues to include a ship-for-pickup order in the intransit response message to a pickup location or system, until the location or system sends a status update indicating that the order or order line is intransit polled.
- Unselected = the Routing Engine includes each ship-for-pickup order or line just once in the intransit response message to a pickup location, and then changes the status to intransit polled.

Polling count: The polling count for the order line is initially set to 0 when it is in transit. Each time the Routing Engine includes an order or line in the intransit response message, it increases the order line's Poll Count.

> **Note:**
>
> Unlike the rules for the fulfillment response, the rules for the intransit response do not include generating the *Order Broker Polling Status Email* when an in transit order exceeds the Polling Retries specified for the system.

Calculating the Available to Promise Quantity

Overview: Each integrated system has its own rules for calculating an item's available quantity based on the on-hand quantity, open orders, pending transfers, and other related data. In Order Broker, you have the option of configuring a system to subtract order lines in certain statuses from the reported available quantity in order to make the availability calculation more accurate. When an order line is in one of these statuses, that quantity in that fulfilling location is considered reserved for the order, and not available to fulfill any other orders.

Example: The available quantity reported by a system for a product location is 37; however, the location is assigned to fulfill an order for 4 units, and the order is in *new_order* status, indicating that the location has not yet polled for new orders and been notified of this order assignment. As a result, the effective available quantity is actually 33 (37-4). You can configure the system to consider order lines in *new_order* status as reserved, and subtract the total quantity of order lines in this status from the reported available quantity to determine the effective available quantity for a fulfilling location.

Fulfilled quantity: You can also track the *Fulfilled Quantity* in order to subtract it from the available quantity.

Ship-for-pickup orders: When the order type is ship-for-pickup, the Fulfilled Quantity is updated for the sourcing location when the order is fulfilled at the pickup location.

The *Available to Promise* quantity for a product location is equal to the available quantity minus the reserved and fulfilled quantity.

Reserved Quantity Calculation

When does Order Broker subtract the reserved quantity? When Order Broker responds to a LocateItems request or a product availability request, assigns a location for an order line, evaluates probability rules, or evaluates whether a location specified for an order can fulfill the order, it subtracts the reserved quantity from the available quantity last reported for the location. For example, if the available quantity in a product location is 10, but there are 9 units of this product on other order lines assigned to that fulfilling location in a reserved status, then Order Broker determines that the available quantity to return in the LocateItems response message, or qualify for a new order, is 1.

Examples: The following table presents examples on how you might subtract the reserved quantities for two different systems:

System Rules	Sample Setup	Sample Result
System subtracts reserved order lines: System 123 (Order Management System) calculates available quantity as `On hand - Protected - Reserved - Reserve Transfer - Backordered = Quantity available` and reports the result to Order Broker; however, if an order is currently in *new_order* status in Order Broker, this indicates that system 123 has not yet polled for the order or been notified of its assignment.	You select the Include Reserved flag for system 123, and select the New_Order status.	System 123 reports a quantity available of 50 for item AB100 in location 10; however, there are currently 2 units of item AB100 assigned for fulfillment to location 10 on an order in *new_order* status. Order Broker subtracts the 2 units in *new_order* status and calculates a quantity available of 48.

System Rules	Sample Setup	Sample Result
System does not subtract any order lines: System 789 reports on-hand quantity to Order Broker as the available quantity.	You select the Include Reserved flag for system 789, and select the New_Order, Accepted, Picked, and Polled statuses.	System 789 reports a quantity available of 30 for item AB100 in location 35; however, there are currently order lines for the item assigned to this location for fulfillment in the following statuses: • new_order: 1 • accepted: 3 • picked: 1 • polled: 5 Order Broker subtracts a total of 10 units in the above statuses and calculates a quantity available of 20.

When you select reserved statuses: When you configure this option for a system at the *System* screen, Order Broker automatically calculates the reserved quantity for each product location for the system by evaluating each item on order in all product locations. The number of affected product locations and order lines determines how long this calculation takes to complete.

Activities that update the reserved quantity: Any activity related to updating order or order line status can also update the reserved quantity for a product location if the system's Include Reserved flag is selected. These activities include:

- creating a new order through the SubmitOrder request message
- updating an existing order status through the StatusUpdate request message or through the Order screen
- receiving a fulfillments request message if the system is not configured to require a status update after polling; see *Require Status Update for Assigned Orders?*
- fulfilling an order through Store Connect

Reviewing the available and reserved quantity for a product location: You can review the reported available quantity minus the reserve quantity at the **Edit Product Location** screen.

Fulfilled Quantity Calculation

Subtracting the fulfilled quantity: If tracking fulfilled quantity is selected for a system, the fulfilled quantity is also subtracted from the available quantity when calculating the Available to Promise quantity. Order Broker updates the fulfilled quantity for a product location when:

- a location ships a delivery order: the fulfilled quantity increases by the shipped quantity
- a customer picks up a pickup order: the fulfilled quantity increases by the picked up quantity
- a customer picks up a ship-for-pickup order: the fulfilled quantity increases by the picked up quantity at the sourcing location

- the fulfilled inventory export runs: if the Track Fulfilled Quantity field for the system is set to *Reset at Inventory Export*, the fulfilled quantity is set to 0, and the available quantity is reduced by the fulfilled quantity, calculated based on the xom_status_history records of the delivery or pickup orders that were included in the export
- the product import runs: if the Track Fulfilled Quantity field for the system is set to *Reset at Product Import*, the fulfilled quantity is set to 0, but the available quantity is not updated

Examples of fulfilled quantity updates: If the Track Fulfilled Quantity field for the system is set to *Reset at Inventory Export*:

- There are 10 units of an item in a location:
  - Available quantity = 10
  - Reserved quantity = 0
  - Fulfilled quantity = 0
  - Available to promise = 10
- An order for 3 units is assigned and is polled. If the reserved statuses include polled orders:
  - Available quantity = 10
  - Reserved quantity = 0
  - Fulfilled quantity = 3
  - Available to promise = 7
- The order is shipped:
  - Available quantity = 10
  - Reserved quantity = 3
  - Fulfilled quantity = 0
  - Available to promise = 7
- The *Fulfilled Inventory Export* runs:
  - Available quantity = 7
  - Reserved quantity = 0
  - Fulfilled quantity = 0
  - Available to promise = 7

See the *Track Fulfilled Quantity* field at the **System** screen for more examples.

Reviewing quantities for a product location: You can review the *Available Quantity*, *Reserved Quantity*, *Fulfilled Quantity*, and the *Quantity to Promise* at the *Edit Product Location* screen and the *Browse Product Locations* window.

Resetting the fulfilled quantity: You can configure a system to reset the fulfilled quantity either when the fulfilled inventory export runs, or when the product import runs. See the *System* screen for more information.

Things to Note about Reserved and Fulfilled Quantity Calculation

- *Special items such as drop ships:* If a system uses special available quantities to indicate a drop ship item, you can set up a probability rule to apply the special available quantity even if there is a reserved quantity. For example, Order Management System reports a quantity available of 9999 for a drop ship item, which is not stored in inventory in the warehouse but can still be reserved on new orders. You might set up a probability rule such as:

```
If Category Equal To [=] DROP
Then Available Quantity Equal [=] 9999
```

Applying a probability rule such as this can enable you to continue using business logic based on the available quantity of 9999 to identify special items such as drop ships.

- *What if the available quantity is negative?* When you update a system to include a new status in the reserve quantity total, the effective available quantity that results for a location might be negative. For example, a location has 10 units available, with 11 units on orders that are in new_order status. If you update the system to include new_order items in the reserved quantity total, the resulting effective available quantity is -1; however, Order Broker does not update the currently assigned orders automatically. Instead, the location needs to reject the orders if it cannot fulfill them all.
- *Reserved statuses should exclude fulfilled:* Do not include fulfilled order lines in the reserved statuses selected for the Store Connect system to avoid incorrect calculation of the *Available to Promise* quantity.

For more information: See the *Fulfilled Inventory Export* for background on exporting inventory updates to a system and ways to update the fulfilled quantity.

Reviewing or Updating Order Broker Orders

You can use the **Order Inquiry** and **Order** screens in Order Broker to review information about orders assigned to the Order Broker for fulfillment. You can also update the orders' status, or the fulfilling or sourcing location, if you have authority. The information displayed at these screens includes:

- order number and request ID
- sold-to and ship-to customers
- originating and fulfilling locations; or placing, sourcing, and pickup locations for ship-for-pickup orders
- details on ordered items, including quantity, pricing, and tax
- current status
- status and fulfilling or sourcing location history
- special handling instructions
- ship via and tracking number
- order totals and balance due, if any

Updating order or order line status: A user with authority to Order Maintenance can update the status of an order (if the organization does not split orders) or the status of an order line (if the organization does split orders). If the Allow Partial Updates preference is selected, then the quantity is always required when you update status.

Updating the fulfilling or sourcing location for an order or line: A user with authority to Order Maintenance can update the assigned fulfilling or sourcing location for an order (if the organization does not split orders) or for an order line (if the organization does split orders). Reassignment is available only for delivery and ship-for-pickup orders. You cannot change the quantity when you change the fulfilling or sourcing location; the change always applies to the entire current quantity for the line.

For more information: See the *Order* screen for information on maintaining an order or order line.

Examples of Order Broker Process Flows

The examples presented below include integrations with Order Management System, a POS system such as Oracle Retail Xstore Suite, and a web storefront. For example, you can connect one or more Order Management system companies, one or more Xstore locations, and your web storefront, allowing the customer to locate merchandise anywhere in this group of locations.

> **Note:**
>
> The sample flow below:

- is illustrative of integration with Order Management System and Xstore. Integrations between Order Broker and other systems will use a somewhat different flow.
- does not reflect all current Order Broker 15.0 options, such as the ability to split orders or lines, track reserved quantities, use zone fulfillment, or update partial line quantities.

Example: Searching for Items

Sample message flow: A typical scenario for locating products might be:

1. A customer on the web storefront wants to check the availability of a particular product for pickup. The web storefront sends an inquiry, such as the locate items request, to Order Broker.
2. Order Broker's database indicates that the product is stocked in the warehouse for your Order Management System company and in several Xstore locations.
3. Order Broker sends an inventory inquiry request to Order Management System and to Xstore to check the current inventory for the requested product in the locations where it is stocked.

   > **Note:**
   >
   > If any system is flagged as "off-line," Order Broker does not attempt to check inventory on demand; instead, it uses the inventory information currently in the Order Broker database.

4. The inventory inquiry response provides the product's current available quantity in each location. Order Management System also provides information about any open purchase orders.

> **Note:**
>
> Order Broker updates the availability information for the product in its own database when it receives the information from each on-line system, creating new product locations if there was not previously a record of an item in one of the system's locations.

5. Order Broker retrieves the availability information for any off-line locations from its own database.

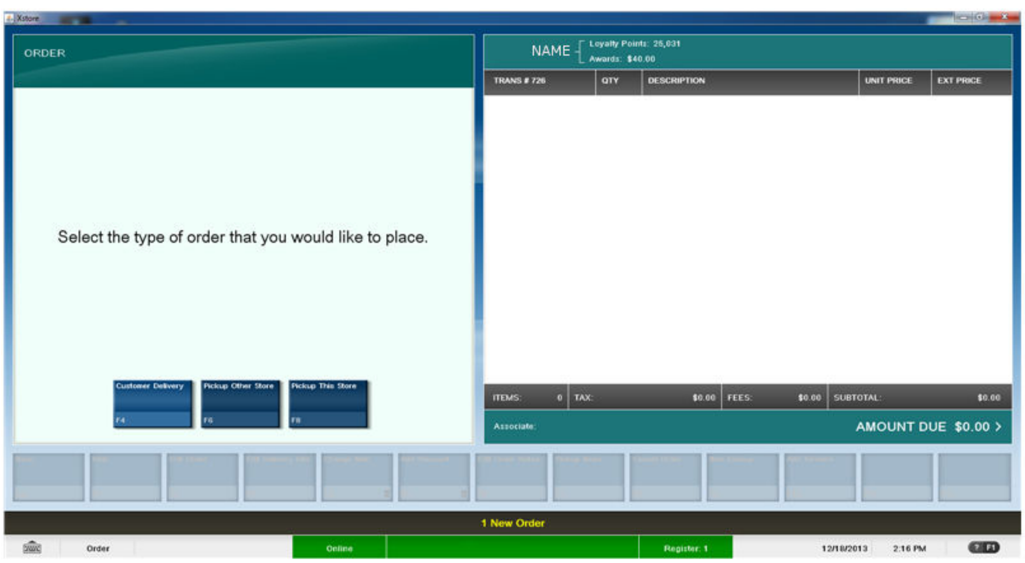
> **Note:**
>
> Even if a system is flagged as on-line, if Order Broker cannot connect to the system's database, it retrieves the availability information from its own database.

6. Order Broker sends the availability information back to the web storefront using the related response message. The customer then might have the option of creating a store pickup request at one of the locations where the product is available.

Example: Creating a Delivery Order in Xstore and Fulfilling it in Order Management System

Overview: The following screens illustrate the process of creating a delivery order in Xstore and sending it to Order Management System Cloud Service for fulfillment.

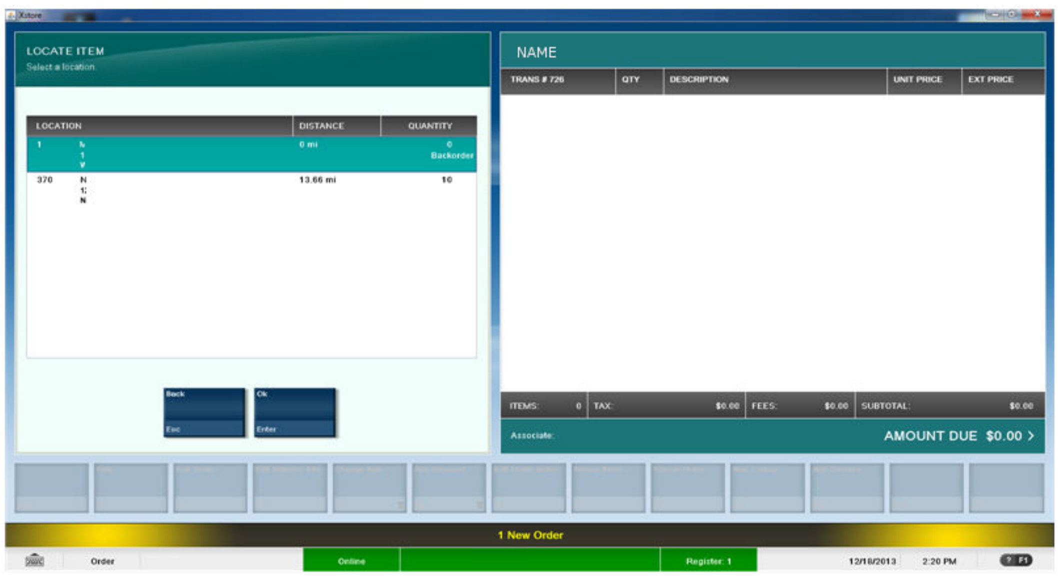
Select order type: In Xstore, select *Customer Delivery* in order to have Order Management System ship the order directly to the customer.



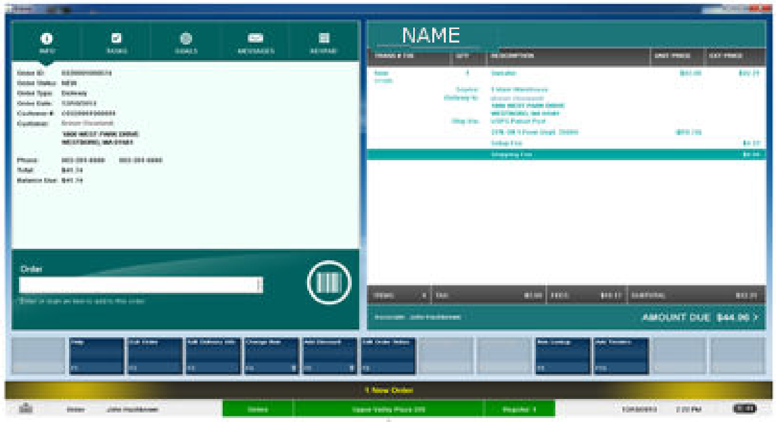
Enter additional information and locate items: After entering the customer's name and address and selecting the ship via, use the Locate Item option to find a location where the merchandise is available for shipment. Behind the scenes:

- Xstore sends a LocateItems request to the Routing Engine
- The Routing Engine queries the Order Management System database for possible fulfilling locations, or checks its own database for the most up-to-date information
- The Routing Engine applies proximity, probability, and your Order Broker preferences to the list of possible locations in order to determine which locations to return to Xstore, the availability information to include, and the order in which to sort the locations, for example:
  - always list distribution centers first
  - include certain locations even if the requested merchandise is backordered
  - include no more than 5 locations in the results
- The Routing Engine uses the LocateItems response to return the results to Xstore

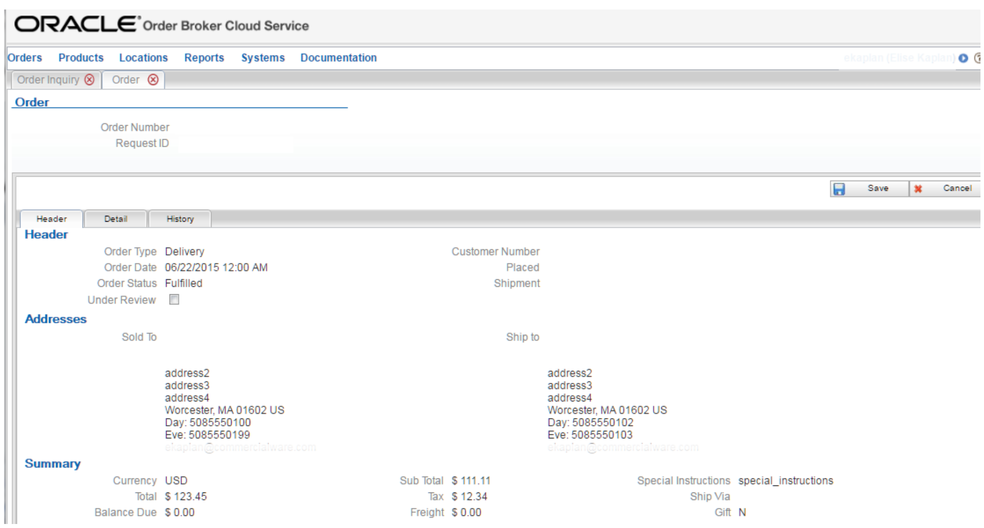
> **Note:**
>
> Depending on your business requirements and the type of order, you can also opt to have the Routing Engine select the fulfilling location.



Complete order entry in Xstore: After selection of a ship via (which must map to an Order Management System ship via code) and completion of tender entry, Xstore sends the submit order request to the Routing Engine.

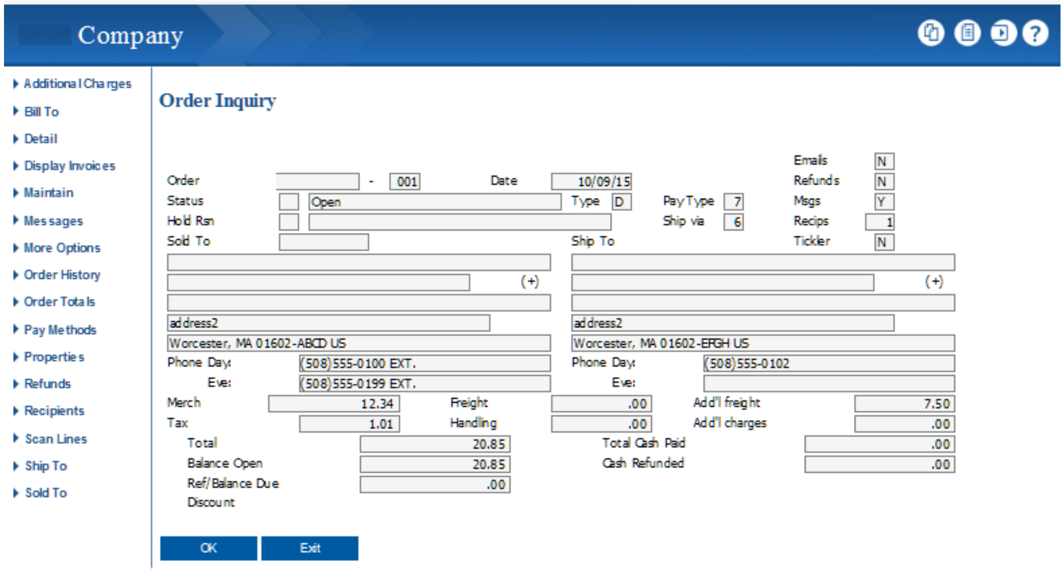


Order created in Order Broker: The Routing Engine creates the order in *new_order* status. The distribution center periodically sends a fulfillment request message to Order Broker to poll for newly-assigned orders.



Order created in Order Management System: When Order Management System receives the fulfillment response message, it uses the information to create an Order Broker record and the new order for processing, including:

- customer name and address information
- Xstore order number is the alternate order number
- Pricing, tax, and other order totals from Xstore
- Order Broker request ID saved in an order message



Fulfillment: Before printing a pick slip for the order Order Management System sends a status inquiry request to the Routing Engine to confirm that the order has not been canceled. As Order Management System puts the order through its normal process of pick slip printing, shipment, and billing, it sends order status updates to the Routing Engine with each change in status. When it ships the order, the information sent to the Routing Engine includes the ship via and tracking number, if available, so this information is available to Xstore when it sends its periodic status inquiry requests.

Data Hierarchy

Order Broker serves as a central repository of availability information for products from each of the integrated systems. Within an organization, one system serves as the default system for item/product information, and the products from other systems are associated with that default system's product. Selecting the default system is an important step in the implementation process for Order Broker. For example, if you use Order Broker with Order Management System, then Order Management System would typically serve as the default system, or system of record. You would create items and SKU's in Order Management System and export them to Order Broker, along with location-specific data and availability information.

In order to understand how Order Broker handles availability information, it is important to review how it stores information on the products and systems that it integrates with.

Organization, System, and Location

The highest organizational level in Order Broker is the organization. The organization consists of any number of systems that will have the ability to communicate with Order Broker in performing searches for available inventory and, potentially, using the Routing Engine.

The organization includes various systems. A system, such as a company in Order Management System or an Xstore database, is integrated with Order Broker for the purposes of providing inventory availability information, requesting inventory availability information, or using the Routing Engine.

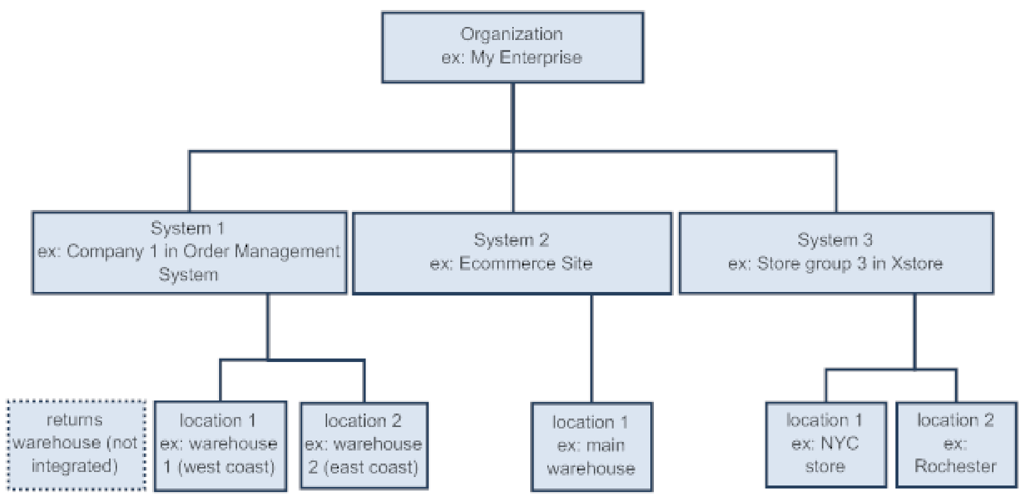
Systems can be on-line or off-line. Order Broker sends messages to on-line systems to get real-time inventory and waits for the responses. For off-line systems, Order Broker relies on the inventory information stored in Order Broker's own database, which is typically scheduled to be updated daily or on some other periodic basis. Order Broker does not send a real-time request to off-line systems.

Each time Order Broker receives an inventory response from an on-line system, it stores the latest availability information for the product in its database. In this way, Order Broker can provide recent availability information even in the case of temporary communication problems.

A system can contain one or more locations, such as a warehouse in Order Management System or a store location in Xstore. Each location would contain inventory whose availability information should be made visible across the organization.

Each location is assigned to a location type, indicating whether it is a store, warehouse, or vendor. Location types are defined within each organization; for example, Pinnacle Company organization might include location types of Pinnacle stores and Pinnacle warehouses, while the Zenith Company organization includes Zenith stores and Zenith warehouses.

Your organization includes only the systems and locations that you have chosen to include in your Order Broker organization. For example, you can omit specific store locations or non-allocatable warehouses from your locations, or training or test companies from your systems.



Product, System Product and Product Location

Order Broker provides availability information for the specific products that you have added to Order Broker's database.

A product, such as a pen, might be identified by a different code, ID or barcode across the systems in your organization; however, Order Broker's database cross-references this same product across the various systems. Each instance of the same product in the various systems represents a system product.

For example, you sell a pen as AB100 in Order Management System company 1. You sell the same pen as 345789123 in Xstore. For the master product AB100, you have two system products in Order Broker: AB100 for Order Management System, and 345890123 for Xstore. It is also possible to use the same code for a product across more than one system; for example, you might also sell the pen as AB100 in Order Management System company 2.

> **Note:**
>
> If you import products from Merchandising Cloud Services applications (RMFCS), then the product code and all system product codes are the same.

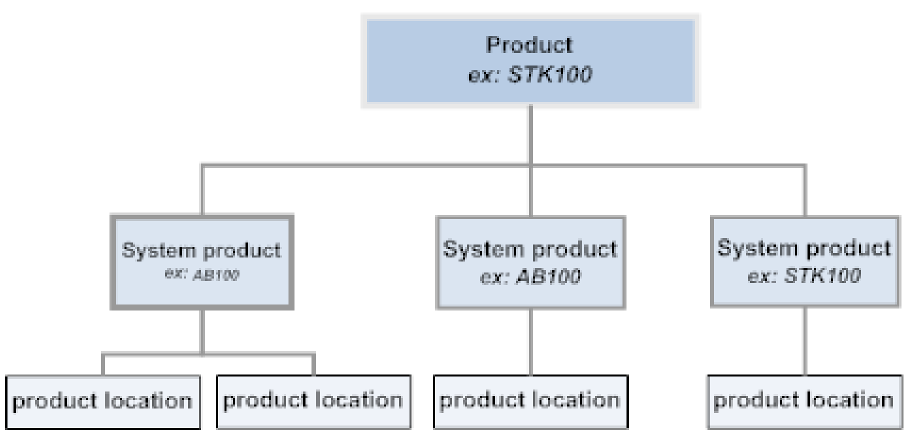
If you are using Order Management System, then the master product is defined as the item/SKU in your default Order Management System company, or system, and other system products are related to this primary product. If you are using Order Management System and Xstore, then the master product is probably defined in Xstore.

Order Broker stores availability information for each system product in the product location where it is stocked. For example, you stock AB100 in warehouses 2 and 3 in Order Management System, and in store location 1 and 2 in Xstore. The information included in the Order Broker database for each product location is:

- available quantity
- next purchase order date (date of the next expected purchase order, if any)
- next purchase order quantity (the quantity expected on the next purchase order)
- date and time when the availability information was last updated for the product location

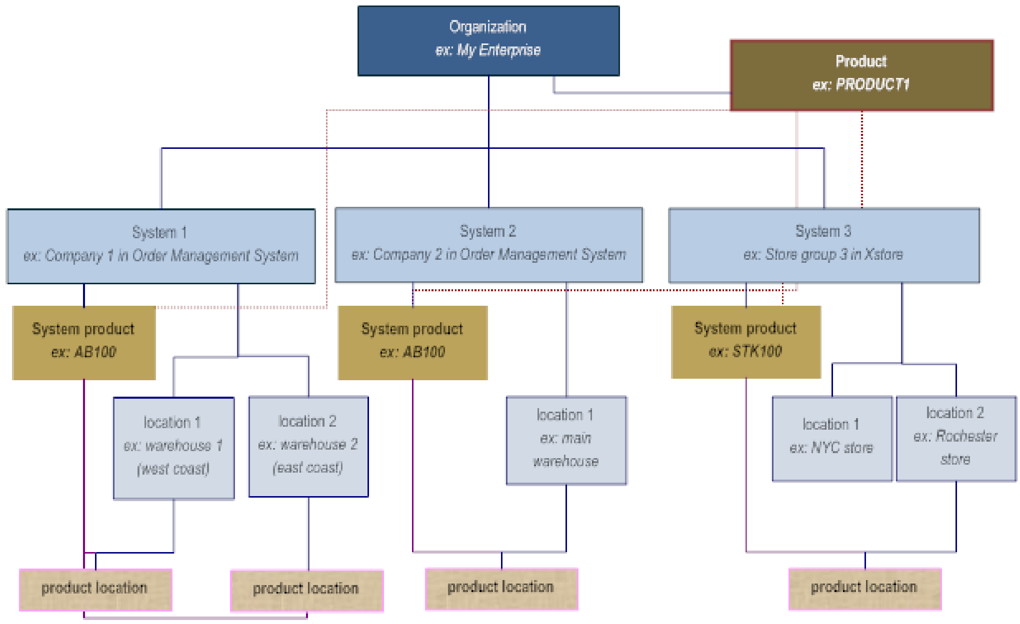
Product barcodes: You can assign UPC barcodes to products in your organization for use in Store Connect. Barcodes are assigned to the product itself rather than a system product, and must be unique in your organization. See *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for background on importing barcodes along with products, system products, locations, and product locations.

As with the *Organization, System, and Location* hierarchy, you control which products and product locations to include in Order Broker. For example, you can omit new products, or products that you sell only on your web storefront and not in your retail stores by using the OROB Eligible flag in Order Management System.



Integrated Data Hierarchy

The following chart illustrates the complete hierarchy in Order Broker, including relationships among *Organization, System, and Location* and *Product, System Product and Product Location*.



Proximity Locator Searching

Overview: In addition to locating merchandise in warehouses and stores, Order Broker can restrict its search to a specific geographical area. For example, if the customer wants to find a certain product in stores within 25 miles of his home, Order Broker restricts the search results to stores within that distance from the customer's address. Proximity logic is available for searches, such as locate items requests and for the Routing Engine.

Supported when? Proximity locator searching is supported only when the Use Proximity Locator option is selected at the *Preferences* screen. If the Geocode Address is blank at the *Tenant-Admin* screen, then proximity locator searching is based on the proximity location table; otherwise, if a Geocode Address is specified, proximity locator searching is based on the Oracle Maps Cloud Service.

Method of distance calculation: In most cases, distance calculation is based on straight-line (Euclidean) search. The straight-line search is based on:

- The actual street address, if provided and if Oracle Maps Cloud Service, if in use; otherwise,
- The center of the zip or postal code.

However, you can calculate turn-by-turn distance for delivery orders using a specified carrier if you use Oracle Maps Cloud Service. See *Turn-by-Turn Distance Calculation for Delivery Orders* for a discussion.

Using the Proximity Location Table

How is proximity calculated? When you use the proximity location table, proximity locator searches are based on the longitude and latitude at the center of each zip or postal code based on the density of population within the zip or postal code.

The distances indicated in the search results are not exact driving distances; instead, they are based on the population centers of the zip or postal codes. For example, if the customer's address is in zip code 01701 and the specified product is available at a store location in zip code 01760, the indicated distance indicates the difference in longitude and latitude from the population center of 01701 to 01760; it does not indicate the actual driving distance from the customer's home.

If the customer's address is in the same zip or postal code as the location, then the distance indicated in the search results is 0.0, regardless of the actual distance between the two addresses in the zip or postal code.

Calculating proximity as described above applies only within the US and Canada.

Rounding: There are situations in which Order Broker might include locations whose distances from the customer's location are greater than the specified radius, if the number can be rounded down to the radius. For example, if the specified radius is 25 miles, and a store is 25.21 miles from the customer's location, Order Broker includes this location in the search results. Including these locations can be helpful, since the proximity search is not an exact driving distance from the customer's location to the store. However, the location is not included if the distance would round up to the next number rather than down to the radius. For example, if the distance calculated is 25.91 miles, Order Broker does not include it in the search results.

What if the request does not specify a postal or zip code? The proximity search relies on the postal or zip code for greatest precision; however, it is still possible to process a proximity search without this piece of information.

For example, a customer is looking for the location closest to 101 Main Street in Springfield, but does not know the zip code for this address. There are 17 zip codes in Springfield, but there is no way for Order Broker to determine the correct zip code for 101 Main Street. In this situation, Order Broker uses the first zip code in the proximity location table for Springfield as a basis for calculating the distance from the customer's location.

What if the postal or zip code is incorrect? If the postal or zip code does not exist in the proximity location table, or if the postal or zip code is in the table but associated with a different city, Order Broker includes locations in the search results, but indicates a distance of 0.

What if the postal or zip code is formatted differently? If a United States zip code includes more than 5 positions (for example, `12345-6789`), Order Broker uses just the first 5 positions of the zip code in order to find more matches in the proximity location table (for example, `12345`).

Determining the latitude and longitude for a location: Order Broker determines the latitude and longitude for a location when you create a new location or update a location's address, either through the import process, the *location update request* message, or through the *New Location* or *Edit Location* screen.

> **Note:**
>
> When you use the proximity locator option, a Canadian postal code should always include the space: for example, L5R 4H1 rather than L5R4H1.

Uploading Zip and Postal Code Information to the Proximity Database

Proximity location table: If you do not use the Oracle Maps Cloud Service to look up latitude and longitude, you need to populate the proximity location table before you can begin using proximity searches in Order Broker. This table provides the latitude and longitude for each postal or zip codes in the US and Canada.

You can use the *Proximity Uploads* screen in Order Broker to upload a comma-separated value (.CSV) file to the proximity location table.

Order Broker uses the information in the proximity location table only if the Geocode Address field at the *Tenant-Admin* screen is blank.

Using the Oracle Maps Cloud Service API

Overview: Order Broker sends geocode requests to the Oracle Maps Cloud Service to determine latitude and longitude for customer and location addresses only if a URL is specified in the Geocode Address field at the *Tenant-Admin* screen. In this case, it does not use the proximity location table to calculate distance, regardless of whether the table contains any information.

How is proximity calculated? The exact latitude and longitude of the location or the customer's address, including the street address, is determined. Any time a street address is specified, it must be valid; otherwise, proximity calculation will be inaccurate or unpredictable.

Turn-by-turn distance? If you use the Oracle Maps Cloud Service API, you have the option to use *Turn-by-Turn Distance Calculation for Delivery Orders*, which calculates the actual driving distance. Otherwise, the distances indicated in the search results are not exact driving distances.

What if the request does not specify a postal code or zip code? In this case, the distances returned in the search results may not be correct.

The proximity calculation works as described above only within the US and Canada. Proximity calculations may be less exact for other countries.

When are requests sent?

- Location addresses: Order Broker sends a geocode request when you create a new location or change the address of the existing location, either at the screen, through an import process, or through a web service response. The geocode request includes the first street address line, city, state or province, postal or zip code, and country code. The geocode response indicates the exact longitude and latitude for the street address.

> **Note:**
>
> When you use the proximity locator option, each location's address must include a valid street address, and a Canadian postal code should always include the space: for example, L5R 4H1 rather than L5R4H1.

- Customer addresses: Order Broker sends a geocode address when it receives a request for a product search, such as a delivery order in the Submit Order request, a Locate Items search, or a Product Availability search. The geocode request includes the street address (optional), city, state or province, postal or zip code, and country code. The geocode response indicates the exact latitude and longitude for the street address.
- Pickup locations for ship-for-pickup orders: In the case of a ship-for-pickup order, Order Broker treats the pickup location address in the same way as a customer address for a delivery or pickup order, sending the pickup location's address in the geocode request, and using the pickup location's address as the central point when calculating proximity.
- Turn-by-turn requests: Sent only for delivery requests using the specified *Carrier for Turn-by-Turn Distance Evaluation* when turn-by-turn calculation is enabled. Order Broker sends a turn-by-turn request, listing the latitude and longitude of each location that has passed the initial pre-qualification based on the specified maximum distance, using the customer's address as the central point in order to calculate the turn-by-turn distance. See *Turn-by-Turn Distance Calculation for Delivery Orders* for more information.

What if Order Broker does not get a geocode or turn-by-turn response? If there is no response within the Connection Timeout interval specified at the *Tenant-Admin* screen, then an error is returned in the response message to the system requesting the search. For example, the response to a *locate items* request indicates `Customer Address not found`. This error might also occur if, for example, the Geocode Address is incorrect.

Setting Proximity Preferences

What happens when proximity search is selected? If a location is set to use proximity searching based on the preference hierarchy described above under *Proximity Locator Searching*, Order Broker calculates the location's distance from the customer before determining whether to include the location in the search results or select a location to fulfill an order or line. If the location is outside the customer's search area, Order Broker does not include the location in the search results, even if the product is available in that location. You might use this setting for stores where the customer can pick up the product.

Ship-for-pickup: In the case of ship-for-pickup orders, proximity searching includes:

- sourcing location: Proximity radius is based on the Sourcing Distance specified at the **Preferences** screen.

  pickup location: Proximity radius is based on the range distance specified in the ProductAvailability request message. Searching for pickup locations is not supported in the LocateItems or SubmitOrder messages.
- **What happens when proximity search is not selected?** If a location is set to not use proximity searching, Order Broker does not calculate its distance to use as a criterion for search results. If the location has the requested item(s) and it is included in the search results, the results indicate a distance of 0 from the customer's location. You might use this preference for warehouses from which you can ship the product. If your preferences indicate to search first based on proximity, such warehouses, if otherwise eligible to be included in the search results, will always be at the top.

> **Note:**
>
> Even if a location such as a warehouse is not subject to proximity locator searching, it should still be created in Oracle Retail Order Broker with a valid address.

Shop Order When Proximity Unknown? If the *Shop Order When Proximity Unknown* flag is selected at the Preferences screen, the Routing Engine does not return an error if the customer's shipping address for an order cannot be determined. In this case, the Routing Engine:

- Uses the ship-to address, if possible; otherwise,
- Uses the address of the originating location, if possible; otherwise,
- Uses a distance of 0 as the proximity.

This preference applies only to the Submit Order request.

If a requested location specified: The customer ship-to address is not validated when a LocateItems request specifies a requested_location, or the SubmitOrder request specifies a requested fulfilling or sourcing location. In this situation, the distance returned in a LocateItems response is 0.

Turn-by-turn distance calculation: Turn-by-turn distance calculation, rather than straight-line distance calculation, is available for delivery orders using a specified carrier if you are using Oracle Maps Cloud Service. See *Turn-by-Turn Distance Calculation for Delivery Orders* for background and setup information.

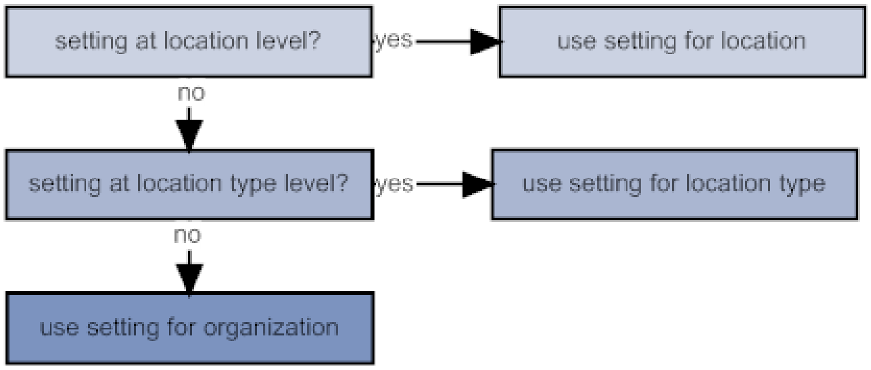
Determining Whether to Use a Preference in Searches

Overview: Use the *Preferences* screen to indicate whether to use proximity or probability in locate items searches, under what conditions to use offline inventory, and for settings and search criteria related to the Routing Engine. You can set preferences at the location, location type, or organization level. Order Broker always starts checking at the lowest level first, and works its way up the hierarchy if a setting is blank.

For example, using proximity in searches is a *Yes* or *No* setting. At each level, you can set this preference to:

- *Yes:* use the preference in searches.
- *No:* do not use the preference in searches.
- *Blank:* go to the next level in the hierarchy to determine whether to use the preference. For example, if this setting is blank for a location, Order Broker checks the setting at the location type level.

This hierarchy allows you to set the preference at the highest applicable level. For example, if you never want to use proximity logic in your U.S. warehouses, you can set this preference at the location type level. However, if you always want to use probability rules, you set this preference at the organization level.



Organization level only: There are some preferences that you cannot set at any level below the organization, such as the Use Offline Newer Than time period, which indicates when it is not necessary for Order Broker to send an inventory inquiry request to an online system.

Using Probability Rules

Overview: Inventory levels at different locations frequently fluctuate because of sales, returns, shrinkage, purchase order receipts, and other activities. As a result, the most recent inventory count in Order Broker might not accurately reflect the actual quantity available in the store or warehouse when the customer wants the product. To avoid disappointing the customer with information that might be outdated or incorrect, you can apply probability rules, based on your best predictions about inventory activity, against the inventory information provided by Order Broker in locate items searches or for the Routing Engine.

Example: Store 10 is not part of an online system; Order Broker receives inventory updates from the store each night but not throughout the day. You can apply a probability rule that always reduces the available quantity of products in store 10 by the average sell-through rate. The average sell-through rate for product AB100 in store 10 is 15 units a day. When a customer inquires on availability for product AB100, if the current off-line available quantity for the product is 20, Order Broker presents the available quantity as 5.

What is a rule? A rule lets you specify whether to transform the availability information for a product location in the response to a locate items request message, or when the Routing Engine selects a fulfilling location. For example, rules can indicate to exclude product locations in locate items or order assignment, or to apply a calculation against one of the inventory fields in the search results (such as reducing the available quantity by 15 in the sample above). The inventory fields that a rule can update are the available quantity, the next expected purchase order date, or the next expected purchase order quantity.

Note:

The rule does not actually update the inventory information for the product location; it only controls the information displayed in the search results or used by the Routing Engine when it assigns a fulfilling location. For example, if a rule results in reducing the available quantity to 5, this quantity is displayed in the search results for a locate items request; but the available quantity specified for the product location remains the same.

Simple rules: Rules can be as simple or complex as you need them to be. A simple rule might be: **always exclude location 20 from locate items searches**. See the *Sample Rules* for instructions on how to create each of the sample rules. You might use this rule, for example, before you open a new store location for business if you are currently stocking it with inventory, but the inventory is not yet for sale to the public. Another simple rule might be: always decrease the available quantity by the shrink rate.

More complex rules (rules with tests): A more complex rule applies one or more tests before determining whether to exclude a location or update one of the inventory fields. For example, a rule with one test might be: **if the available quantity is less than the sell-through quantity, then present the available quantity as 0**.

Another example of a more complex rule might allow you to add a cushion for late purchase orders. A rule might be: **if the available quantity is less than 10 and the next expected PO date is before today (i.e., the purchase order is late), reduce the available quantity by 20%**. Another rule might apply to a group of products for which shipment is typically late. A rule might be: **if system product is AB200 or system product is AB300, add 5 days to the next PO date**. Similarly, you might set up a rule based on other product attributes, such as: **if department is 1538, reduce the available quantity by 15%.**

Assigning rules: You can assign rules to one or more locations, location types, or organizations. For example, if you would like a rule to apply only to a particular store location, you can assign it to that location only. If you would always like to reduce the available quantity by the sell-through quantity for all U.S. stores, you would apply that rule to that location type. When you assign rules, you have the option of specifying a beginning and/or ending date, and of specifying whether the rule applies only to off-line or on-line inventory levels (see *inventory level type*).

Rules use a hierarchy, similar to *Proximity Locator Searching*, in determining which rule applies to which product location. For example, if you assign a rule at the location level, it might override a rule assignment at the location type or organization level.

Within a single level, you use sequence numbers to identify the priority to rules. For example, if you have 2 rules assigned to a location type, the rule with the lower sequence number is evaluated first.

Because each rule can update only a single field, it is possible for a product location to be subject to multiple rules. Once a particular field has been subject to a rule, Order Broker stops evaluating rules for the product location in that search. However, a rule set up to exclude a product location overrides any rules that apply to individual fields.

When does probability rule evaluation take place? During a search for product locations, Order Broker:

- identifies the product locations that might be eligible for consideration based on proximity
- applies any probability rules
- determines which product locations are still eligible after applying the probability rules
- for a locate items search or order assignment, sorts the product locations based on the hierarchy specified at the **Preferences** screen or the **Edit Order Broker Preference Override** screen
- for a locate items search, eliminates any product locations that are not within the Maximum No. Responses specified at the **Preferences** screen, and returns the results

Rules do not apply when a locate item request or submit order request specifies a fulfilling or sourcing location.

Exclude Locations with Zero Available? If the Exclude Locations with Zero Availability setting at the *Preferences* screen is selected, any possible product locations whose current available to promise quantity are 0 or less are excluded from consideration before the application of any potential probability rules.

Flexibility of rule creation: Order Broker provides you with extreme flexibility in setting up rules; however, it is important that you make sure your rules are not so complex that the results are unpredictable. Oracle recommends that you test each rule that you apply to make sure that it works as you intend it to.

Rounding: Available quantity and next PO quantity are always presented as whole numbers in the locate items or Routing Engine search results, so that Order Broker rounds the result of any calculation up or down to the nearest whole number. For example, a result of 18.4 is rounded down to 18; 18.5 or higher is rounded up to 19.

For more information: See *Probability Rule Wizard* for instructions on setting up rules, rule examples, and suggestions for testing rules.

> **Note:**
>
> In order to use probability rules for an organization, you must select the probability rules preference. You can set this preference only at the organization level at the *Preferences* screen.

Using Zones for Fulfillment

Purpose: Zone fulfillment provides a means to have the Routing Engine limit order assignment to particular store or warehouse locations based on the geographical area of the order's shipping address.

Example: You prefer to use the distribution center in Hartford, Connecticut to ship orders to customers in the New England states, even if a location in California has a greater quantity available.

Why use zone fulfillment? You might use zone fulfillment to save on freight charges and expedite shipping in certain areas. Zone fulfillment logic can also increase the speed of location assignment, since it uses a limited number of eligible locations.

Fulfillment of delivery orders and sourcing for ship-for-pickup only: Zone fulfillment applies only to delivery and ship-for-pickup orders, and these types of locate items or product availability searches. It does not apply to store pickup orders.

Applies to both standard brokering and weighted brokering: Regardless of whether your organization uses standard brokering rules, or uses weighted brokering rules and assignment through the Science Engine, you can use zone fulfillment to route orders.

How does zone fulfillment work? When you use zone fulfillment, the Routing Engine determines whether a shipping address falls within a fulfillment zone. It then restricts the list of possible fulfilling locations to the one(s) specified for the zone. This evaluation takes place when the Routing Engine receives a submit order message, a product availability search request, a locate items request, or when an existing order is rejected by the assigned fulfilling location, If the order cannot be fulfilled or sourced by the locations included in the zone, it is assigned to the *default unfulfillable location*. Similarly, in the case of a *locate items* or product availability search, the response message indicates that the requested item(s) is/are not available.

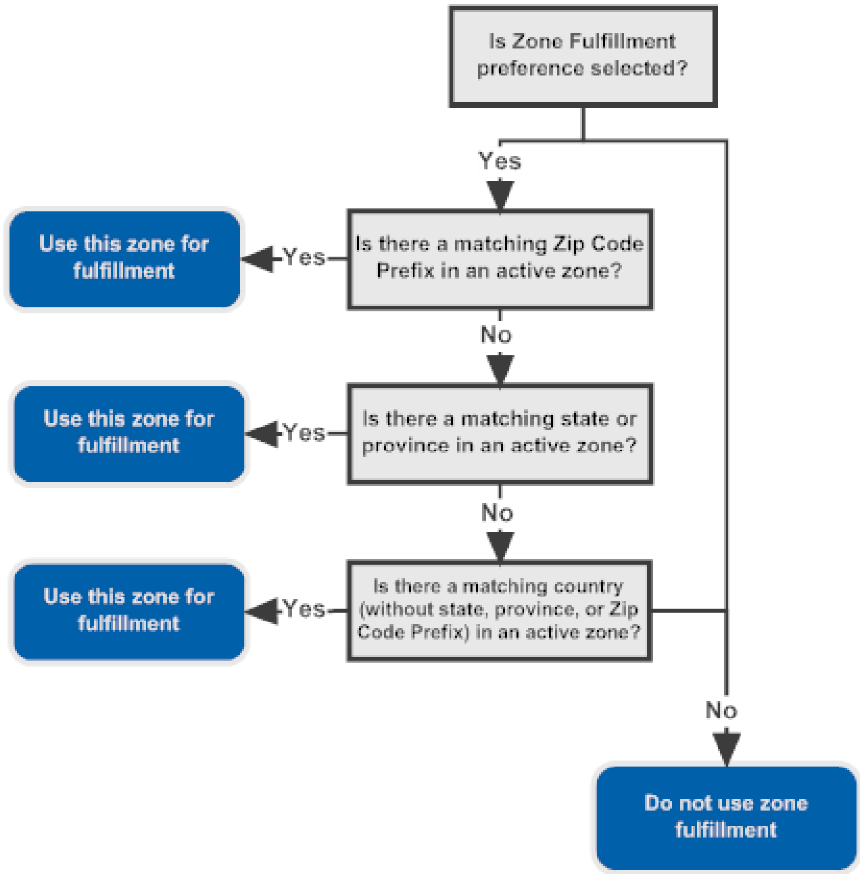
Primary and alternate locations: When you set up a zone for fulfillment you can specify:

- *primary locations:* One or more locations where you prefer to place orders within the zone. At least one primary location is required.

  alternate locations: Optionally, one or more locations that are eligible for order assignment if the order cannot be fulfilled within the list of primary locations. You might set up alternate locations to help eliminate the possibility of losing a sale.
- **Selecting geographical areas for shipping addresses:** You can set up zones to include shipping addresses based on:

1. *Zip code prefix range:* For example, all orders shipping in zip codes that start with 021 through 025 should ship from any of the Boston retail locations. This option is available for United States addresses only.
2. *State or province:* For example, all orders shipping to New York, New Jersey, Pennsylvania, and Delaware ship from the east coast distribution center or the outlet store. This option is available for United States and Canadian addresses only.
3. *Country:* For example, all orders shipping to France, Germany, and Austria ship from the Austrian distribution center. This option is available for countries other than the United States and Canada only if the Use Proximity Locator preference is unselected for your organization. Contact your Oracle representative about how to use proximity calculation for countries other than the U.S. and Canada.

When attempting to assign an order, the Routing Engine starts zone selection with the most specific criterion (zip code prefix) and works through to the most general (country). If the shipping address on the order does not match any zones, then the Routing Engine uses the standard assignment logic as set up at the **Preferences** screen or the **Edit Order Preference Override** screen.



Example: You have set up the following active zones:

- Portland, Maine Area: includes zip code prefixes 040 through 043
  - Northern New England: includes Maine, New Hampshire, and Massachusetts
  - United States
  - If a locate items request or the order's shipping address is in:
  - Portland, Maine, zip code 04101: use the Portland, Maine Area zone
  - Anson, Maine, zip code 04911: use the Northern New England zone
  - Providence, Rhode Island, zip code 02903: use the United States zone
  - Toronto, Canada: do not restrict order assignment by zone

Order Broker selection criteria still apply: When a shipping address falls within a fulfillment zone, the Routing Engine uses existing rules when selecting and ordering locations, except that the eligible locations are restricted to those specified for the zone. For example, if you set the Order Broker preferences to select first based on On Hand Count, the primary location with the highest on-hand count is selected. Also, the Routing Engine executes this process first within the primary locations before checking any alternate locations, as described above.

If you group shipment locations: Zone fulfillment logic still applies to locate items processing if you use the *grouping shipment locations* option.

Requested location? The Routing Engine does not use zone fulfillment logic if:

- the *locate items* request specifies a *requested location*
- the *submit order message* specifies a location for fulfillment

  In both of these cases, the Routing Engine restricts location selection or assignment to the specified location, regardless of whether the shipping address falls within a zone that includes the location.

How to start using zones: The Routing Engine uses zones for fulfillment when:

- the Use Zone Fulfillment flag at the **Preferences** screen is selected, and
- the zone is flagged as *Active*

For more information: See the *Fulfillment Zone Wizard*.

Standard or weighted brokering? The primary and alternate search hierarchy within zones varies depending upon whether Use Weighted Brokering Rules is selected. See:

- *Primary and Alternate Search Hierarchy: Standard Brokering*
- *Primary and Alternate Search Hierarchy: Weighted Brokering*

Primary and Alternate Search Hierarchy: Standard Brokering

The following process applies if Use Weighted Brokering Rules is *not* selected.

If splitting: If you use *splitting orders*, the Routing Engine attempts to:

1. Assign the entire order to a single location within the primary locations specified for the zone; otherwise, if this is not possible;
2. Split the order within the primary locations specified for the zone; otherwise, if this is not possible;
3. Assign the entire order to a single location within the alternate locations specified for the zone; otherwise, if this is not possible;
4. Split the order within the alternate locations specified for the zone; if this is not possible;
5. Split the order across the primary and alternate locations; if this is not possible;
6. Assign the order to the *default unfulfillable location*.

If not splitting: If you do not split orders, the Routing Engine attempts to:

1. Assign the entire order to a single primary location specified for the zone; otherwise,
2. Assign the entire order to a single alternate location specified for the zone; otherwise;
3. Assign the order to the *default unfulfillable location*.

Primary and Alternate Search Hierarchy: Weighted Brokering

Weighted Brokering and the Science Engine: When you use weighted brokering, the Routing Engine passes information to the Science Engine indicating whether each eligible product location is in a primary or alternate location. The Science Engine then uses the same rules on order assignment and splitting as the Routing Engine uses for standard brokering. See *Submit Order Request for Delivery Order (Weighted Brokering)* for a discussion.

The following process applies when Use Weighted Brokering Rules *is* selected.

If splitting order is supported:

1. Assign the entire order within the primary locations specified for the zone; if this is not possible,
2. Assign the entire order by splitting it across the primary and alternate locations; if this is not possible;
3. Assign the entire order within the alternate locations specified for the zone; if this is not possible;
4. Assign the order to the *default unfulfillable location*.

If not splitting:

1. Assign the entire order to a single primary location specified for the zone; otherwise,
2. Assign the entire order to a single alternate location specified for the zone; otherwise;
3. Assign the order to the *default unfulfillable location*.

Using Maximum Daily Order Assignment

Purpose: You can specify the maximum number of delivery or ship-for-pickup orders to assign to a location on a daily basis.

Example: Location 10 cannot be assigned more than 10 orders a day, while location 20 cannot be assigned more than 15 orders a day.

Delivery and ship-for-pickup orders only: The maximum daily order restriction applies to delivery or ship-for-pickup orders only. There is no daily limit to the number of store pickup orders that can be assigned to a location.

When a location is over the daily maximum: If a location has met or exceeded the maximum number of orders for the day, the Routing Engine:

- does not include the location in the locate items search results for a delivery or ship-for-pickup order unless it is the requested location; see *Selecting a Location for a Delivery Order*
- does not assign a delivery or ship-for-pickup order, or a line on a delivery or ship-for-pickup order, when a submit order message does not specify a fulfilling location
- does not assign a delivery or ship-for-pickup order, or a line on a delivery or ship-for-pickup order, when the current assigned fulfilling or sourcing location rejects the order ("reshop")

These restrictions apply regardless of whether the location has the inventory on-hand, or is flagged as Backorder Available.

Tracking daily order count: The Routing Engine uses a counter for the location to track the number of delivery and ship-for-pickup orders assigned for the day. This counter is not displayed on any screen.

- Counter increased when? The daily order count increases when a delivery or ship-for-pickup order is initially assigned, or when an order is reassigned through reshopping. The counter for a location increases by one regardless of:

  the number of lines on the order being assigned to the location

  – the quantities currently on the order lines

  - whether the order is split across multiple locations
  - whether the Routing Engine assigns the order, or the location was specified in the submit order message, or selected in order maintenance when you are assigning the order to a different location

> **Note:**
>
> The counter is not increased for store pickup orders, or for selection as a pickup location for a ship-for-pickup order.

- Counter not decreased: The daily order count does not decrease if an order is rejected or canceled.
- Counter is at the location level: Even if you specify a Maximum Number of Orders for a location type, the Routing Engine tracks order assignment for each location separately and does not combine the order totals across the location type.
- Reset daily: The Routing Engine checks the daily order count date for the location each time an order is assigned, and starts the counter over at one if the last daily order count date is not the current date. Like the order counter, the daily order count date is not displayed on any screen.

Overriding the order limit: Even if a location is not eligible for automatic delivery or ship-for-pickup order assignment based on the daily order count, you can still:

- Request current inventory in the location by requesting the location specifically in the locate items search request (using the requested_location, or "favorite store" element)
- Assign a delivery or ship-for-pickup order by specifying the location in the submit order request message
- Select the location through order maintenance, if you have the required authority

When you assign a location that has already met or exceeded the daily order limit, the Routing Engine continues to increase the daily order counter for the location.

> **Note:**
>
> No maximum applies to the Default Unfulfillable Location where the Routing Engine assigns unfulfillable orders.

Setup through preferences: To use the maximum daily order assignment option:

- Select Use Maximum Order Limits at the **Preferences** screen.
- Specify the Maximum Daily Orders for the organization, and optionally at the location type level or the location level. A setting of *0* indicates that there is no limit to the number of orders that can be assigned to a location, while a setting of Not Defined indicates to check at the next level of either the location type or the organization.

When evaluating whether a maximum applies, the Routing Engine checks the Maximum Daily Orders setting for:

1. the location; otherwise,

2. If the Maximum Daily Orders is Not Defined for the location, check the location type; otherwise,
3. if the Maximum Daily Orders is Not Defined for the location type or the location, use the organization setting.

Updating Order Status at the Line or Unit Level

Overview: The Allow Partial Updates preference for an organization controls whether you update order line status at the order line level or at the unit level. This option is available only if the organization has the Allow Split Order preference selected.

Example: An order line has a quantity of 5 units. The location has only 3 units of the item available. If the Allow Partial Updates preference is:

- selected, the assigned location can send a status update rejecting 2 units
- unselected, the location must accept or reject the entire order line

Quantity always required: When this is preference selected, the location sending a status update always needs to specify the quantity to update as well as the line number. Similarly, the quantity is a required field when you use the **Edit Order Item** window to update an order line.

Creating a new order line: If the Allow Partial Updates preference is selected, when the Routing Engine receives a status update whose quantity is lower than the total line quantity, it creates a new order line for the specified status, and decreases the quantity for the existing order line.

Example: Order line 1 has a quantity of 7 units and is currently in picked status. The assigned location sends a status update indicating that 3 units are fulfilled. The Routing Engine:

- creates line 2 for a quantity of 3 and a status of fulfilled
- updates line 1 to a quantity 4, and leaves the status as picked

> **Note:**
>
> The Routing Engine creates a new line with the next available line number. For example, if there were already 3 lines on the order, the Routing Engine creates line 4 for the 3 fulfilled units.

Split line not required: Although the Routing Engine effectively splits an existing line when it receives a partial quantity update, it is not necessary to have the Allow Split Line preference selected. The Allow Split Line preference controls whether to split a line at initial order assignment, not whether to split a line due to later changes in status.

Rejecting individual units and the Search Retries setting: The Routing Engine uses the Search Retries setting to determine the total number of times it can attempt to reassign delivery and ship-for-pickup orders when they are rejected by their fulfilling or sourcing locations. This limit applies to the entire order, regardless of whether the organization supports split orders, split lines, or partial status updates.

Example: The Search Retries preference is set to 2. If the organization supports:

- Split order but not split line or partial status update, the order is assigned to the Default Unfulfillable Location after the order is rejected 2 times.

- Split order and split line but not partial status update, the order line is assigned to the Default Unfulfillable Location after the total number of line rejections received and “reshop” attempts is 2, regardless of whether the rejections were for the same line or different lines.
- Split order and partial status update, the order line is assigned to the Default Unfulfillable Location after the total number of unit quantity rejections received and “reshop” attempts is 2, regardless of whether the rejections were for the same line or different lines, or whether the rejections were for the full line quantity or a partial line quantity.

Rejecting individual units and reshopping to different fulfilling or sourcing locations: When the Routing Engine receives a status update rejecting a quantity of a delivery or ship-for-pickup order line, it uses its standard logic (including probability rules and zones) to assign each rejected quantity. If a location rejects a partial quantity of a line in 2 separate status updates, the Routing Engine assigns each partial quantity to a different fulfilling location.

Example:

- Location A rejects all 3 units of an order line in a single status update, and the Routing Engine assigns all 3 units to location B.
- Location A rejects 1 out of 3 units on an order line, and the Routing Engine assigns the unit to location B. If location A then rejects the remaining 2 units of the order line, the Routing Engine assigns the 2 units to location C.

Current Order Broker line number required for status update: When the Allow Partial Update preference is selected but the *Use Requesting System Line Number in Status Update* flag is not selected, or the status update does not come from the originating location, the `line_no` specified in a status update request message needs to match the current line number in Order Broker, and the specified quantity cannot exceed the current quantity on the order line. In order to be sure of sending the current line number, the requesting system should first send a status inquiry request before sending the status update request.

Example: Location A sends its line #11 for 3 units to Order Broker as a delivery order. In order to send a status update request to cancel the line, the location must first send a status inquiry request. The status inquiry response indicates that the current line numbers in Order Broker are:

- line 1 in accepted status, with a quantity of 1
- line 2 in picked status, with a quantity of 2
- The location then sends a status update request for the current quantities of lines 1 and 2, indicating to cancel both lines.

> **Note:**
>
> Sending the status inquiry first also enables the requesting system to confirm that the order line has not been canceled or fulfilled.

Screen differences to note: When any line on an order splits, either through initial order assignment or a partial quantity status update, then the *Detail* tab on the **Order** screen groups the split lines under the requesting system line number. If none of the lines are split, then the *Detail* tab provides maintenance or display access only through the original requesting system line number; otherwise, you need to select the current line number in Order Broker to maintain or display. See *Reviewing or Updating Order Broker Orders* and the *Order* screen for more information.

Before turning on partial quantity updates: Before you enable this option, it is important to confirm that updating a partial quantity of a line is supported by all systems integrating with Order Broker.

Auto-Cancel Unclaimed Orders

Purpose: You can configure Order Broker to automatically cancel pickup or ship-for-pickup order lines if the customer does not pick them up after a specified number of days.

> **Note:**
>
> The auto-cancel option is available only if Allow Split Order is selected at the **Preferences** screen.

Assignment of Pickup By Date

When you configure auto-cancel, Order Broker assigns a Pickup By Date to a line when the line is first eligible for pickup. The Pickup By Date is based on:

- The auto-cancel settings at the **Preferences** screen, indicating the number of days to wait after the line is eligible for pickup before the line can be automatically canceled. The **Preferences** screen also includes the cancel reason code to use when automatically cancelling unclaimed orders.
- The Days Open settings for the pickup location, so that any days when the location is not open are excluded from the Pickup By Date calculation.

  For example, the *Auto Cancel Days of Unclaimed Pickup Orders* at the **Preferences** screen is set to 2 days. The pickup location is flagged as open all days except for Sunday. If the line is eligible for pickup on Saturday the 5th, the line is assigned a Pickup By Date of Tuesday the 8th, since Sunday is not included. However, if the pickup location is open on Sunday, the line is assigned a Pickup By Date of Monday the 7th.

  Order Broker makes the Pickup By Date assignment when the line status changes to:
- *Picked*, if the order type is pickup, or if the order type is ship-for-pickup and the sourcing location is the same as the pickup location; otherwise,
- *Received*, if the order type is ship-for-pickup, and the sourcing location is different from the pickup location. In this situation, the line is not eligible for pickup until the sourcing location has transferred the inventory to the pickup location, and the pickup location has received it.

  > **Note:**
  >
  > The Pickup By Date is assigned even if the order is currently under review.

When the Pickup By Date is assigned, an order history message is written, for example: `Pickup By Date: 12/31/2017.`

Auto-Cancellation Updates

When the *Auto Cancel Unclaimed Pickup Orders* job runs, it:

- Evaluates each organization that has Allow Split Order selected.
- If *Auto Cancel Days of Unclaimed Pickup Orders* specifies a number of days, selects each pickup order line in picked status and with a Pickup By Date that is in the past.
- If *Auto Cancel Days of Unclaimed Ship For Pickup Orders* specifies a number of days, select each ship-for-pickup order line that is either in picked status with the sourcing location is the same as the pickup location, or in received status with the sourcing location different from the sourcing location, and with a Pickup By Date that is in the past.
- For each selected order line:
  - Changes the status to canceled.
  - Clears the Pickup By Date.
  - Creates a history record, displayed at the History tab of the Order screen, indicating that the order line was canceled with the *Auto Cancel Reason*. The User ID indicated is SYSTEM and the Source is WS.
  - Sets the AUTO_CANCELLED flag in the XOM_ITEM table to 1.

Sample Auto-Cancellation Flows

Auto-cancel calculation: An order line is eligible for cancellation by the auto-cancel job after the assigned Pickup By Date has passed, excluding any dates that are not flagged as Days Open for the pickup location.

- *Open all days:*
  - The Auto Cancel Days of Unclaimed Pickup Orders is set to 3.
  - The pickup location has all days selected as Days Open.
  - The order line is picked on Saturday, the 16th, and the Pickup By Date is set to the 19th, 3 days later.
  - When the auto-cancel job runs on the 20th, the order line is canceled.
- *Location closed on Sunday:*
  - The Auto Cancel Days of Unclaimed Pickup Orders is set to 3.
  - The pickup location has all days selected as Days Open except for Sunday.
  - The order line is picked on Saturday, the 16th, and the Pickup By Date is set to the 20th, 3 days later, omitting Sunday from the calculation
  - When the auto-cancel job runs on the 21st, the order line is canceled.
  - The job uses the Auto Cancel Reason specified at the **Preferences** screen.

Changing an Order Line's Pickup By Date

You can change an order line's Pickup By Date:

- *Order Status Update request message:* This message enables you to change the *Under Review* setting as well as the Pickup By Date.

- *Store Connect:* The **Change Pick Up Date** window enables the store associate to change the Pickup By Date.
- *Order Inquiry:* The *Edit Order Item* window enables you to change the Pickup By Date assigned to an order line.

When the Pickup By Date is changed, an order history message is written, for example: `Pickup By Date: 12/31/2017.`

Status changes clear the Pickup By Date: Once the Pickup By Date is set for a line, a change of status clears the Pickup By Date. This occurs regardless of whether the line's status changes to fulfilled because it was picked up, or because it was canceled or rejected. When the Pickup By Date is cleared, an order history message is written: `Pickup By Date Removed`.

Report

The *Auto Cancel Report* provides a listing of orders that include any lines that were automatically canceled within a specified date range, and includes customer contact information. See that report for more information.

Required Setup for Auto-Cancellation

To enable auto-cancellation of unclaimed pickup or ship-for-pickup orders:

- *Auto-cancel reason code:* Use the *Reason Codes* screen in Modern View to create the *Auto Cancel Reason*.
- *Preferences screen:* At the *Fulfillment* tab, set:
  - *Auto Cancel Days of Unclaimed Pickup Orders* to enable auto-cancellation of pickup orders.
  - *Auto Cancel Days of Unclaimed Ship For Pickup Orders* to enable auto-cancellation of unclaimed ship-for-pickup orders.
  - *Auto Cancel Reason* for the auto-cancel job to use when canceling the orders.

  > **Note:**
  >
  > These fields are available only if *Allow Split Order* is selected.

- *Locations:* Optionally, use the Days Open fields for a location to unselect any days of the week that should not be included when calculating the Pickup By Date for orders assigned to the location for pickup. Ways to create or update locations include:
  - *Importing Locations through File Storage API* process: When you create a new location through the location import, all days of the week listed under Days Open are selected by default. When you update an existing location through the import, the Days Open settings are not changed.
  - *New Location* or *Edit Location* screens: The Days Open settings are available at these screens.
  - *Location Bulk Updates* wizard: You can use this option to set the Days Open for a group of individual locations.
  - *location update request message:* See the **Operations Guide** for background on using this request message.

- *Auto-cancel job:* Use the *Schedule Jobs* screen to specify the time of day when the auto-cancel job should run, and to enable the job.

Things to Note about Auto-Cancellation

Reviewing the Pickup By Date for a line:

- When the Pickup By Date is automatically assigned to the order line, a transaction history record is created. The Pickup By Date assignment is displayed under Transaction Notes at the *History* tab of the **Order** screen.
- Web service message responses: The Pickup By Date for an order line, if assigned, is included in the responses to the Order Search response, Status List response, and Status Inquiry response messages.
- Store Connect screens: The Pickup By Date is displayed on various order detail screens in Store Connect.

  The Pickup By Date is assigned even if the order is currently flagged as Under Review.

Partial updates: If the Allow Partial Update preference is selected, it is possible for a different Pickup By Date to be assigned to individual units on an order line, or for one unit to have a Pickup By Date while the other does not. For example, a pickup order line with two units is assigned to a pickup location. If one unit is picked on Tuesday and the other is picked on Wednesday, the line splits, and each resulting line has a different Pickup By Date.

Existing orders without Pickup By Dates: Any orders that were already eligible for pickup before you configure your organization for auto-cancellation will not be automatically assigned a Pickup By Date. Optionally, you can assign a Pickup By Date to an existing order through the *Edit Order Item* window in Order Broker, the **Change Pick Up Date** window in Store Connect, or through the Order Status Update request web service message.

For more information: See:

- *Reason Codes* screen in Modern View to create the *Auto Cancel Reason*.
- *Preferences* screen to set the *Auto Cancel Days of Unclaimed Pickup Orders* and *Auto Cancel Reason*, as well as the *Auto Cancel Days of Unclaimed Ship For Pickup Orders*.
- *New Location* screen or the *Importing Locations through File Storage API* process to create locations, including the Days Open.
- *Edit Location* screen or *Location Bulk Updates* wizard to update the Days Open for locations.
- *Schedule Jobs* screen to schedule the auto-cancel job.
- *Edit Order Item* window or the Order Update request chapter in the Operations Guide to change an order line's Pickup By Date.
- *Browse Order Item* window or *Edit Order Item* window to review an order line's Pickup By Date.
- LocationUpdate request chapter in the Operations Guide for information on updating the Days Open.
- OrderSearch response chapter, Order Inquiry StatusRequestResponse chapter, or Order Status List response chapter in the Operations Guide for an integrated system to obtain an order line's Pickup By Date.

Order Fulfillment through RICS Integration

Overview: Use communication through Oracle Retail Integration Cloud Service (RICS) to manage order fulfillment through the following Oracle Retail applications:

- *Inventory reservation and warehouse order communication:* Order fulfillment is through Oracle Retail Merchandising Foundation Cloud Service (RMFCS).
- *Store order communication:* Order fulfillment is through Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS) and its UX layer Store Operations Cloud Service (SOCS).

> **Note:**
>
> The order fulfillment process described below is available for delivery orders only.

Order creation: The order creation process includes the following steps:

- *Submit order:* An integrated system, such as Order Management System or Order Management System Cloud Service, submits the order to Order Broker.
- *Order routing:* Order Broker selects one or more fulfilling locations for the delivery order, as described in the *Order Broker Routing Engine Overview*.
- *Communication through RICS:* If the system associated with a fulfilling location is configured for RICS integration, Order Broker posts the order or order line to RICS.
- *Successful post?* If Order Broker receives a message indicating that the order posting was a success, the order status changes to *posted*. Order Broker assigns this status only to orders fulfilled through the RICS integration.
- *RICS broadcasts the order request to SIM or EICS and RMFCS:* If the assigned fulfilling location is a:
  - Warehouse: RMFCS creates the order. RICS sends a status update of *accepted* to Order Broker. SIM and EICS ignore the request if the fulfilling location is a warehouse.
  - Store location: SIM or EICS creates the order.

  Regardless of whether the assigned fulfilling location is a warehouse or a store location, RMFCS reserves inventory for the order.

Which orders are eligible for posting to RICS?

- *Assigned to system configured for RICS?* Only orders that are assigned to fulfilling locations in a system configured for RICS are eligible for posting.
- *Delivery orders only:* Other order types are not submitted.
- *Under review?* You need to select the Hold Under Review Orders setting for the system to indicate not to submit orders whose Under Review flag is selected, but instead to wait until the flag is cleared.

Additional events that trigger posting an order to RICS: In addition to posting at order creation, Order Broker also submits eligible orders to RICS when:

- *Rejection:* The currently assigned fulfillment location rejects the order, or you change the status to rejected through the *Order* screen or the *Edit Order Item* window, depending on whether you use split orders.

  This type of rejection can also occur if a store associate cannot find inventory for the order, and cancels the order in SIM; or if warehouse staff cannot find inventory, and they cancel the order in RMFCS.

  In either case, Order Broker “reshops” the order to a new fulfilling location.
- *Location change:* You change the assigned fulfilling location through the *Order* screen or the *Edit Order Item* window, depending on whether you use split orders.

Releasing reservation: Release reservation processing takes place if the *Send Release Reservation Inventory Message* flag is selected at the **System** screen. When an order or line assigned through RICS is canceled or rejected, Order Broker generates a message to RICS indicating that the reserved inventory for the order can be released. This information enables RMFCS to use the inventory for other orders, and notifies RMFCS, EICS, or SIM to update the status of the order. The status update can occur either through a web service request, or at the *Order* screen or the *Edit Order Item* window.

The release reservation message is also generated when you assign a new fulfilling location through the *Order* screen or the *Edit Order Item* window.

Order Broker generates the release reservation message immediately. If Order Broker then reshops a rejected order to another enterprise location, it posts the new order information through RICS for fulfillment.

> **Note:**
>
> Order Broker does not send the release reservation message if the order is under review and the system is configured not to send orders that are under review, because in this situation the order was not yet posted through RICS.

Updating order status: RICS sends status update messages when the status of an order or line changes. These messages map to the Order Status Update Request message. When the order or line ships, the information updated can include a carton number and tracking information, as well as the shipping date from the fulfilling location.

If RICS sends a status update message and the order is already in that status, Order Broker does not return an error to RICS; however, the error is noted in the *RICS Log tab* of the **Order** screen, for example: Error updating status for request id = XXXXX line number = X - got an exception. Request already at provided status.

Under review change notifications: Order Broker submits an under review message to RICS to notify the fulfilling system when an open order that was previously submitted is now under review, or when a submitted order that was previously under review is no longer under review.

For example, this situation can occur when:

- Order Broker submits an order through RICS for fulfillment.
- A number of days later, the authorization expires; and when the originating system, such as Order Management System, submits a new authorization request, it is declined.

- The originating system sends an order update request to Order Broker to set the Under Review flag to Y.

Order Broker then submits the under review request to RICS, indicating not to fulfill the order at this time.

Similarly, Order Broker submits the under review update message to RICS when an open order that was previously under review is no longer under review, and can be fulfilled.

The under review updates are sent only when:

- The order is a Delivery order, and
- The order status is currently Posted, Polled, Accepted, or Picked, and
- The setting of the Under Review flag changes.

Hold Under Review? The *Hold Under Review Orders* flag should normally be selected at the **System** screen. When this flag is selected, an order is not initially sent to RICS when created if it is currently under review; instead, when the Under Review flag is cleared for the order, it is posted automatically as a new order to RICS, and the under review message is not generated. However, if the setting of the Under Review flag changes after the order is posted, the under review message is generated, indicating to hold the order.

If order or release posting fails: Posting orders or release reservation requests through RICS can fail because:

- Communication with RICS did not succeed. For example, this might occur if RICS was temporarily unavailable, the URL specified at the **System** screen was incorrect, or the request timed out.

  In this case, a background job triggers submission of all of these messages on an hourly basis. The messages are posted in first-in first-out order (oldest first). The *RICS Log tab* of the **Order** screen displays these messages with a Retry Status of *Failed*.
- There an unrecoverable error in the information to be submitted. For example, the location code specified in the request is alphabetical rather than numeric.

  In this case, Order Broker does not reattempt to submit these messages, because they would not succeed. The RICS log records are eligible to be purged through the daily cleanup job based on the RICS Log History retention days, described below. Order Broker changes the status of the order or lines to *unfulfillable*.

RICS log: The *RICS Log tab* of the **Order** screen provides further detail about activity and the messages sent and received. From this tab, you can also open the *RICS Log Message* window to review request or response messages.

Reviewing order activity and messages: The Transaction Notes at the *History* tab of the *Order* screen describe updates for orders fulfilled through the RICS integration. For example, when:

- Order Broker submits the order to RICS: History message is `Posted to RICS`.
- Order Broker notifies RICS to release the reservation for the order because it has been canceled or rejected: `RICS Release Reservation Message Sent`.
- Order Broker notifies RICS that the Under Review flag for an open, submitted order has been selected: `Under Review: Yes; RICS Under Review Message Sent`. The note indicate a setting of `No` if the Under Review flag has been cleared.
- There is an unrecoverable error in the information to be submitted, such as alphabetical characters in a numeric field: `Unable to create RICS message`.

Required configuration: To fulfill orders using RICS, complete the following configuration in Order Broker.

- *System configuration:* Create SIM or EICS and RMFCS as systems in Order Broker.
- Use the *RICS Integration tab* at the **System** screen to configure these systems. The information you can specify at this tab includes:
  - Flagging the system as Online for RICS communication. If this flag is not selected, no communication takes place with RICS.
  - Connection and authentication information for communicating with RICS.

    > **Note:**
    >
    > The User ID specified at the *RICS Integration tab* needs to have the Operator or Admin role in RIB in order to support sending stop and start requests at the beginning and end of the Inventory Quantity Export, indicating to pause individual inventory updates while the export runs. See *Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)* for more information.

- Settings that control order flow, including selecting the Hold Under Review Orders flag to prevent submitting orders that are currently held for review.

  The Use Requesting System Line Number in Status Update flag at the *Orders* tab of the **System** screen should be unselected.
- *Web service authorization:* Create web service users for the *Oracle Retail Integration Cloud Service* that will be required for authentication of inbound messages to Order Broker. See *Web Service Authorization* for more information.
- *Preference settings:* Note the following settings at the *Preferences* screen:
  - Delivery orders only: The locations associated with the SIM and RMFCS systems should be configured in Order Broker to support delivery orders only. You cannot use the RICS integration to fulfill any other order types.
  - Cannot use split line or partial status update: The Allow Split Line and Allow Partial Updates preferences should not be selected for your organization. However, you can select Allow Split Order.
  - Split order: If Allow Split Order is selected at the **Preferences** screen, the Create Fulfillment Order message to RICS has the partial delivery indicator (<partial_delivery_ind> tag set to Y; otherwise, it is set to N.

    Other preference settings, such as Acknowledge Order Before Brokering, do not affect the ability to fulfill orders through RICS.
- *Store and warehouse locations:* See *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS or Merchandising Omni Services)* for information. Note that location codes must be numeric for integration through RICS.
- *RICS Log History retention days:* This field at the *Tenant-Admin* screen specifies the number of days to retain RICS_LOG records before the *daily cleanup job* automatically deletes them. Can be from 0 to 30 days. Only successful records and records with unrecoverable errors are eligible for deletion.

- *Setup in Order Management System:* If you use Order Management System, note the following required setup.
  - Orders originating in Order Management System should use an originating location that matches the E-Commerce Virtual Warehouse in RMFCS. The originating location passed from Order Management System is determined by the Originating Location to Pass to OROB (M32) system control value.
  - Order Management System should have the Use OROB for Fulfillment Assignment (M31) system control value selected.
  - See the Order Management System online help, including Brokered Backorders and Enterprise Order Integration, for background on additional setup in Order Management System.

For more information: Contact your Oracle representative for more information on configuration required beyond settings in Order Broker and Order Management System.

Troubleshooting and things to note:

- If any order type besides a delivery order is assigned to a location in a system that uses RICS for order fulfillment, it will not be submitted to RICS. Instead, it will remain in *new order* status.
- The processing described above takes place only for systems that are configured to use RICS based on the settings at the *RICS Integration tab* at the **System** screen.
- RICS order fulfillment does not support fulfilling an order that includes the same item on multiple order lines, such as a ship-alone item.
- Hold under review? If the order is fulfilled through RICS order fulfillment and the *Hold Under Review Orders* flag for the system is selected, the order is not posted for fulfillment until you clear the Under Review flag. This flag should be selected.
- Require status update? The *Require Status Update* flag does not control whether the order status is automatically set to polled, since the fulfillment request message is not used.
- Retry status displayed for unrecoverable errors: When the fulfillment request message to RICS has an unrecoverable error, the Retry Status listed at the *RICS Integration tab* at the **System** screen is *Success*. This status indicates that the RICS log record is eligible to be purged, because Order Broker will not attempt to post the message again.
- It is not necessary to configure the hourly job that resubmits failed requests to RICS. This job runs automatically. It is the same job that checks for any orders that are still assigned to the In Process location if you use *Acknowledge Order Before Brokering*.
- In process orders excluded: Orders that are currently assigned to the *IN PROCESS location* are not submitted until they are assigned to a location associated with a system flagged for RICS order processing. See *Acknowledge Order Before Brokering* for a discussion on in process orders.

For more information: See:

- *RICS Integration tab* at the **System** screen.
- *Web Service Authorization* for information on setting up authentication for the Oracle Retail Integration Cloud Service.
- *RICS Log tab* at the **Order** screen.
- *RICS Log Message* window.
- RICS Message Mapping in the Operations Guide for message and mapping details.

Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database

Part of the initial setup required for Order Broker is to populate the database with information such as locations, products, system products, and product locations. Also, you normally update this information periodically with any new or changed products and periodic inventory updates, and have the option of adding new information at any time.

Merchandising Cloud Services applications (RMFCS) imports: Importing products and barcodes from Merchandising Cloud Services applications (RMFCS) uses a different process than the one described under *Import Process Overview (Other than RMFCS File Upload through OCDS or Merchandising Omni Services)* See *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services*.

Load products from default system first: Begin by importing products from your default system, creating records in the product, system_product, and product_location tables for this system. Afterward, load products from any system that is not flagged as the default in order to create the system_product and product_location records for that system. The default system is the one flagged as the Default at the **Systems** screen. See the description of the *Data Hierarchy* for a discussion of the default system.

You cannot load a product from a non-default system before first creating the product for the default system.

> **Note:**
>
> Oracle recommends that you do not use UPC codes as system product codes, because UPCs are not permanently assigned to a single product.

Job batch size: The *Job Batch Size* defines the number of records for Order Broker to include in each batch of product, product location, and incremental inventory import records. The default setting is 1000 records.

Case-sensitive? Oracle recommends that when you use a file import, that you use uppercase for all import file names, regardless of whether the code identifying the importing system is all uppercase. For example, even if the system code is Xstore, the import file name could be PRODUCT_XSTORE.TXT.

Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services

You can import the following information through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services:

- *Warehouse locations:* The import includes only virtual warehouse locations, with the address derived from the physical warehouse associated with the virtual warehouse. The data imported does not include additional information, such as location attributes or preference settings.

- *Store locations.* The import includes store locations and addresses. The data imported does not include additional information, such as location attributes or preference settings.
- *Products and system products.* The system product code should be the same as the product code for all integrating systems. The import should take place first for the default system, in order to create the product records first before attempting to create system product records for additional systems.
- *Item image URLs:* Optionally, you can import item image URLs in order to display item images in Store Connect.
- *Inventory (product locations) for warehouse and store locations.* The available quantity is imported, but not purchase order information.
- *Product barcodes:* Optionally, you can import product barcodes so that they can be used to scan items in Store Connect.

About OCDS or Merchandising Omni Services: You can use OCDS or Merchandising Omni Services to import data that originates in Oracle Retail Merchandising Foundation Cloud Services.

> **Note:**
>
> When Order Management System integrates with Order Broker for customer order fulfillment, if either product integrates with OCDS or Merchandising Omni Services, the other product also needs to be integrated with OCDS or Merchandising Omni Services.

Order Broker submits a web service request for each type of import, and uses the data in the response to update each target table.

> **Note:**
>
> When RMFCS is the system of record for products, the product code is the same as the system product code in all systems in your organization, including the default system. For example, if the product code is 12345, then 12345 is also the system product code for all systems.

Configuration: To import this data from OCDS or Merchandising Omni Services, use the *OCDS Integration tab* at the *System* screen to specify:

- The URL to use when requesting data for each type of import.
- A flag to indicate whether each import type is currently active. For example, you might perform an initial warehouse and store inventory load and then deactivate these imports.
- The default location types to use when creating warehouse and store locations.
- Authentication information for the web service requests, as well as the wait time.

Submitting the import: If any of the OCDS URLs defined at the *System* screen are flagged as active, data imports take place from OCDS or Merchandising Omni Services rather than from any other source. Importing data through the file storage API does not take place.

For more information: See *OCDS or Merchandising Omni Services Imports*.

File Storage API for Imports and Exports

About the File Storage API: The File Storage API is a RESTful web service that supports importing and exporting data: uploads, downloads, deletions, and inquiries. If the File Storage API is enabled, it handles all imports and exports through files, including:

- Imports scheduled through the *Schedule Jobs* screen:
  - products, system products, and item image URLs for display in Store Connect
  - product locations
  - locations
  - product barcodes
- Incremental inventory updates, scheduled through the **Schedule Jobs** screen
- Exports scheduled through the **Schedule Jobs** screen:
  - Inventory quantity
  - Fulfilled inventory
  - Sales order data extract

> **Note:**
>
> *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services* does not use the file storage API.

The file storage API is enabled by default for new installations of release 18.0 or higher.

Other import and export options: Other import and export options are handled through web service messages, including:

- *Imports:*
  - Product Update Request Message or Product Update Request JSON Message: creates or updates products, system products, and product locations
  - Availability Update Request XML Message: Updates the available quantity for product locations, or creates product locations if they do not already exist.
  - Location Update Request JSON Message: Create or update locations
  - CreateDSVendor Request Message: Create or update vendors
- *Exports:*
  - System Discovery Request and Response XML Messages: Export a list of systems
  - Location Discovery Request and Response XML Messages: Export a list of locations for a system
  - Location Detail Request and Response JSON Messages: Request detailed information on all locations for a system

See the Operations Guide for information on the above web service request messages.

Use of the FILE_STORAGE table: The FILE_STORAGE table stores data on import files and export files, as well as errors that occur during import processing. The web service requests files from, deletes files in, and puts files in this table.

Web service requests: Requests supported by the File Storage API and their purposes are:

- getFile: Download an export file or error file that has been generated by Order Broker.
- deleteFile: Delete a file record, such as an export file that has already been retrieved.
- putFile: Upload an import file to Order Broker. The file format can be text (.TXT file extension) or compressed (.ZIP file extension). If the file is compressed, Order Broker extracts the information when processing the import. No other file extensions are supported. Note: If you are uploading a zip file, then it must contain a TXT file of the same name as the ZIP file, and be in the base level of the file, with no subfolders.

  The File Storage API returns an error if there is already an existing file in the table with the same name, regardless of whether the suffix is different. For example, the API returns an error if you attempt to upload a file named PRODUCT_SYS.ZIP if there is currently a FILE_STORAGE record named PRODUCT_SYS.TXT.
- getFiles: Request a list of file records in the FILE_STORAGE table.

Every request needs to specify a container. The types of containers are:

- OROB-IMPORTS: Import file records that can be processed through the File Storage API. For example, use the putFile request to create an OROB-IMPORTS record so that Order Broker can import the data.
- OROB-EXPORTS: Export file records that have been generated through the File Storage API. For example, use the getFile request to download an export file, or use the deleteFile record to delete an export that has been downloaded.
- OROB-ERRORS: Error file records that resulted from an import process through the File Storage API. For example, use the getFiles request to retrieve a list of error files that have been created.

All request messages also need to use a valid Storage web service user ID with a valid password. See *Web Service Authorization* for background.

File cleanup:

- Import file records: Order Broker deletes these file records when they are processed, although errors are retained in the OROB-ERRORS container of the file storage table.
- Export file records: It is the responsibility of the integrating system to delete these records. They can be deleted through the deleteFile request message.
- Error files records: These records are purged automatically through the daily cleanup job based on the number of days specified in the *File Storage* setting under *Retention Settings* at the **Tenant-Admin** screen.

Reviewing or deleting file storage records: Use the *File Storage History* screen to review and, optionally, delete file storage records.

Enabling the File Storage API: The File Storage API is enabled if the STORAGE_ID in the TENANT_CONFIG table in the Admin database is set to `database`. This entry is set by default for a new installation of Order Broker 18.0 or later. To enable File Storage after upgrading from an earlier release of Order Broker, contact your Oracle representative.

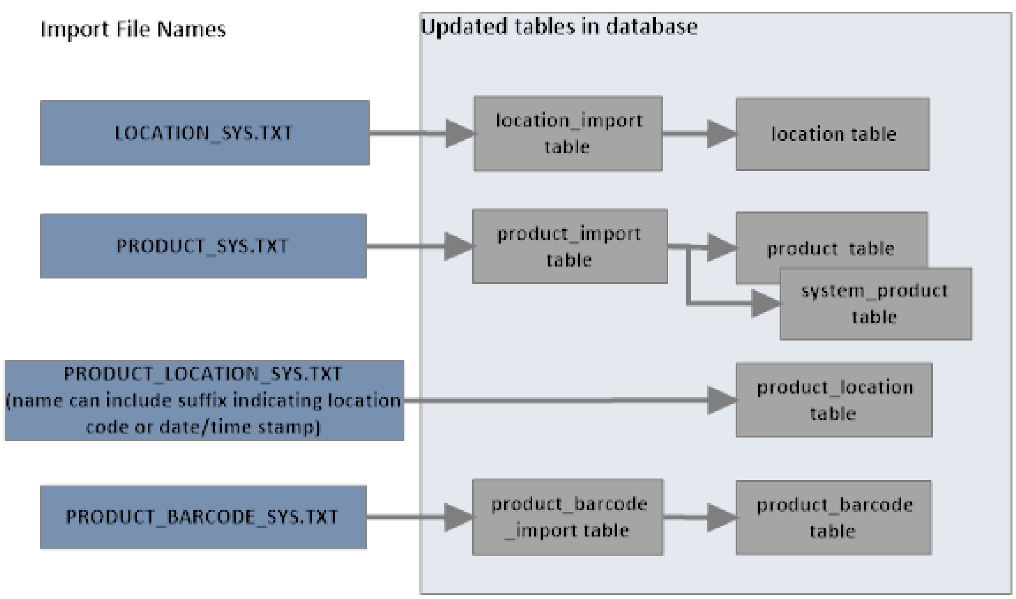
Summary of File Storage API responses: The response codes that might be returned to file storage requests include:

- 200 = The getFile or getFiles request was successful.
- 204 = The putFile or deleteFile request was successful.
- 401 = The request failed because the web service user and password were not correct.
- 403 = The file you attempted to upload from RMFCS exceeded 1 GB.
- 404 = The request failed for other reasons.

For more information: See the Order Broker File Storage API technical reference paper on My Oracle Support for more information on implementing this API.

Import Process Overview (Other than RMFCS File Upload through OCDS or Merchandising Omni Services)

For information on imports from RMFCS, see *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services*



Import processing steps: Processing steps are parallel for all types of information:

1. The process clears outdated records from the import tables (location_import, product_import, product_barcode_import, and product_import_log) based on the Days to Keep Errors specified for the system at the *Schedule Jobs* screen. If a record is flagged with an error code, it remains in the import table until the Days to Keep Errors has passed and you next run an import for that system; otherwise, the process adds or updates the record or field in the target table (location, product, system_product, or product_barcode), and the record is cleared the next time you run an import for the system, regardless of whether the Days to Keep Errors has passed.

> **Note:**
>
> The product location import does not use an import table; instead, it updates the product_location table directly.

> **Note:**
>
> The product location import file name can include an optional suffix to indicate information such as the location code or a date/time stamp. Use of a file name suffix enables the inventory system to stage multiple product location import files throughout the day, and have the files processed in order when Order Broker runs a scheduled import. See *Importing Product Locations through File Storage API* for more information.

2. The process checks the FILE_STORAGE table for a record, created from a compressed (ZIP) file and extracted when the FILE_STORAGE record is created.

   The process uses files or records named `LOCATION_SYS.TXT`, `PRODUCT_SYS.TXT`, `PRODUCT_LOCATION_SYS.TXT`, and `PRODUCT_BARCODE_SYS.TXT` files, where `SYS` is the system code running the import. The product location import file name can include an optional suffix to indicate information such as the location code or a date/time stamp. Use of a file name suffix enables the inventory system to stage multiple product location import files throughout the day, and have the files processed in order when Order Broker runs a scheduled import.

3. For each pipe-delimited file record, the process confirms that the data is formatted correctly and can be loaded into the related import table. For example, it checks whether a record includes an incorrect number of columns, has alphabetical characters in a numeric field, includes an improperly formatted date, or includes a field that exceeds the maximum length in the database. If there are any basic formatting errors in the uploaded data, it makes a copy of the file containing just the records in error in an OROB-ERRORS record in the FILE_STORAGE table with a message indicating the nature of the error.
4. The process deletes the record from the FILE_STORAGE table.
5. The process creates records in the import tables (location_import, product_import, or product_barcode_import**)** with any records that passed the basic edit. This step does not take place for product location records.
6. The process checks the location, product, and product barcode in the respective import tables for specific data errors, such as confirming that a product or system is correct, and flags the import file records with any errors.
7. For the product location import, the records in the FILE_STORAGE record or the PRODUCT_LOCATION_SYS.TXT file are checked for errors. Any entries in the record or import file that pass the edits update the PRODUCT_LOCATION table.
8. Any records in the import table that pass the edits update the target tables. Any empty fields in the import table do not update the target table; however, in the case of location updates, the location address is treated as a unit, so if any address data is passed for a location, the entire address is replaced with the data from the import table, including clearing any fields that are empty in the import table.
9. The process writes a log record for each import process. Import history information is available for review at the *Product Imports History* screen. History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

10. Details on each product, location, or barcode record in error are available on a related error report (the *Location Import Errors Report*, *Product Barcode Import Errors Report*, or *Product Import Errors Report*). Also, the process updates the information on the last process date, time, and user for the system.
11. Based on the *Location Product Import* setting at the **Event Logging** screen, the process generates an email notification indicating success (if all records were successfully imported) or failure (if any record could not be imported).

Reset fulfilled quantity during product import? If the system's *Track Fulfilled Quantity* field is set to *Reset During Product Import*, each product location is reset before the import process finishes. The *Last Status* is not updated at the **Schedule Jobs** screen until this last step is complete.

> **Note:**
>
> Oracle recommends that you do not use UPC codes as system product codes, because UPCs are not permanently assigned to a single product.

Running the process: You can set up a periodic processing schedule at the *Schedule Jobs* screen. You can also run the process on demand at that screen.

Updating or creating product locations through inventory inquiry: When Order Broker requests updated inventory information from an *online system* as a result of a LocateItems request, Product Availability request, or SubmitOrder message, or when "reshopping" a rejected order, it updates the availability information for existing product locations, or creates new product locations if they do not already exist. However, it does not send an inventory inquiry to a system unless a product location for the item and system already exists.

> **Note:**
>
> Order Broker updates the product location records only if the *Update Offline Inventory* flag at the **Preferences** screen is selected.

Using the product update or availability update request messages:

- *Product update request message*: Enables you to create or update products, system products, and product locations; however, does not update product location attributes, and does not update item image URLs.
- *Availability update request message:* Enables you to increase, decrease, or reset the available quantity for a product location.

These options can be useful for ad hoc updates. See the *Operations Guide* for more information.

Processing incremental inventory updates: Optionally, you can run an update program to import updated inventory levels from an integrated system, and then calculate the probable quantity available in each of the system's product locations after factoring in any reserved quantity and current probability rules. A system can then retrieve the updated inventory information, including calculating the probable quantity, and use this information (for example, display this quantity on the ecommerce site). See the *Incremental Inventory Import* for more information.

For more information: See:

- *System*, *Schedule Jobs*, and *Product Imports History:* configuring the import process and reviewing completed imports.
- *Importing Locations through File Storage API*, *Importing Products and System Products through File Storage API*, *Importing Product Locations through File Storage API*, and *Importing UPC Barcodes through File Storage API*: import details, file layouts, and data mapping.
- *Product Barcode Import Errors Report*, *Product Import Errors Report*, *Location Import Errors Report*: reviewing errors.
- *Operations Guide:* information on the interactive RESTful inventory update.

Additional Types of Import Processes (Other than RMFCS File Upload and OCDS or Merchandising Omni Services)

The additional types of import processes you can use to create and update locations, products and system products, product locations, and product barcodes in Order Broker are described briefly below.

RMFCS: For information on imports from RMFCS, see *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services*,

Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)

Order Broker processes individual inventory updates whenever they are received from through Oracle Retail Integration Cloud Service (RICS). This information originates in Oracle Retail Merchandising Foundation Cloud Service (RMFCS) or Enterprise Inventory Cloud Service (EICS). Processing this update requires Oracle Retail Integration Cloud Service authentication; see *Web Service Authorization* for more information.

Information received: The information in the individual inventory update maps to the *availability update request*:

- If the product location already exists, only the *Available Quantity* is updated with the available to sell quantity passed. The current available quantity is overwritten with the available to sell quantity passed; no calculation takes place. This update functions the same way as a `method` of `SET` passed in the availability update request message.
- If the product location does not already exist, it is created, using the system item, location, and location type passed.

If any of the information passed does not map correctly into the existing data in Order Broker, Order Broker returns an error to the RICS. Examples of incorrect data include:

- The user name and password for web service authentication are not valid.
- The item, location, or system do not exist.

See the *Availability Update Request XML Message* and *Availability Update Response XML Message* in the Operations Guide for more details.

Import Files

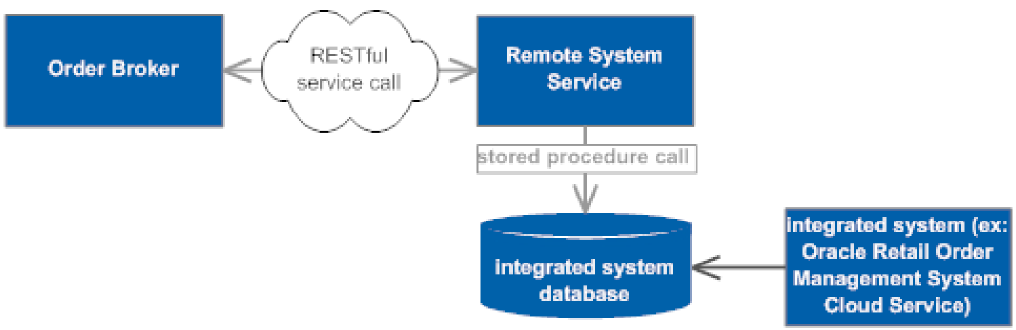
For import through the *File Storage API for Imports and Exports*, pipe-delimited files containing location, product, product location, and product barcode information are placed in the FILE_STORAGE table through a RESTful web service. You use the *Schedule Jobs* screen to set up an import schedule to process the data and create or update the related records in the database.

Periodic import from files does not require the system to be flagged as Online. The Online setting at the *System* screen indicates that Order Broker obtains current inventory information from the system when the Routing Engine evaluates which locations might be able to fulfill an order. Order Broker updates the product location records with this information only if the *Update Offline Inventory* flag at the **Preferences** screen is selected.

Additional import processes are described below.

Interactive Updates

Interactive inventory update through RESTful service call: If the system is flagged as Online and a URL is specified, Order Broker also uses a RESTful service call to request current inventory information for a specific product when it requires the information for a LocateItems request, a SubmitOrder request, or a Product Availability request, or when it needs to “reshop” a rejected order. In this case, the Remote System Service returns the information in a RESTful service response rather than in flat files.



Order Broker updates the product location records only if the *Update Offline Inventory* flag at the **Preferences** screen is selected.

Obtaining interactive updates from SIM or EICS: Order Broker can request interactive inventory updates from Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS). If a system is flagged as Online and a Connection Type of *SIM* is specified, Order Broker sends a request message to obtain interactive inventory updates for a specific product when it requires the information for a LocateItems request or a SubmitOrder request, a Product Availability request, or when it needs to “reshop” a rejected order.

SIM returns the current Total Stock On Hand from the store location that matches the product location in Order Broker, and the Available Quantity for the product location is updated with this quantity. If the Item Status in SIM or EICS is Deleted, Discontinued, or Inactive, the Available Quantity for the product location is set to 0.

Differences between Order Broker and SIM or EICS:

- Even if the Item Status in SIM or EICS is Deleted, Discontinued, or Inactive, the Available Quantity for the product location is set to 0. However, the product location may still be eligible for order assignment if the Backorder Available flag for the location is selected.

- The response from SIM or EICS does not update the Next PO Date or Next PO Quantity for a product location.
- SIM and EICS support a decimal position for the available quantity. If the available quantity passed from SIM includes a decimal, Order Broker truncates the number. For example, if SIM passes an available quantity of 12.75, the available quantity in Order Broker is set to 12.

Incremental Inventory Import

Optionally, you can configure a system to periodically run an import of updates to product location records. This process enables you to schedule incremental product location updates from the integrated system. See the *Incremental Inventory Import* option at the **Schedule Jobs** screen for details.

Reporting Options

Overview: Order Broker provides several operations reports. You can run reports on demand as well as schedule reports on a daily or weekly basis.

Operations reports: The reports provided with Order Broker are:

- *Auto Cancellation Report:* A list of orders that include lines that have been automatically canceled. See *Auto-Cancel Unclaimed Orders* for a discussion.
- *Unfulfillable Report:* A list of orders that were completely or partially unfulfillable. The information on the report includes the customer's name, email address, and phone numbers, as well as the type of order and whether the order is fully or partially unfulfillable.
  Order Status Report: A list of orders which you can generate by status, type, originating or fulfilling location, region, or ship via.
- *Zone List Report:* Identifies the locations assigned to each active or inactive fulfillment zone as either a primary or alternate fulfilling location, and lists locations that are not assigned to any zones.
- *Import Errors Reports:* A list of locations that failed when importing locations, products, system products, product locations, or product barcodes.

Report formats: You can generate reports in PDF format; in XLS format (so that you can open the report in a Microsoft Excel®); or in both formats. You can view or download the reports from a window in Order Broker and can send them by email to one or more recipients.

The *Data Formats* defined for the organization control the language, numeric, and date formats on reports. See *Localization Settings* for more information.

Scheduling reports: You can create one or multiple schedules for a report, specifying which day(s) of the week and which time(s) of the day when Order Broker should generate the report automatically. Each schedule can specify different selection criteria, such as different order statuses, locations, or date ranges. Also, you can specify an email distribution list for each schedule of a report.

Anonymizing Data

Purpose: Order Broker offers two options for anonymizing private data: a web service that can anonymize various types of data on demand, and a scheduled job that anonymizes closed sales orders and purchase orders based on the time period since the orders were created.

Private data web service: This web service includes two types of requests and responses:

- *GetPrivateData:* The GetPrivateData request can request private data for customers, orders, vendors, and users.
- *ForgetPrivateData:* The ForgetPrivateData request can inquire on whether private data for customers, orders, vendors, and users is eligible to be anonymized, or can request that the data be anonymized.

When the data is anonymized, it is converted to asterisks. Once the data is anonymized, it cannot be recovered.

Purging customer data from completed orders: The *Completed Order Private Data Purge* job enables you to anonymize customer data on completed orders based on the number of days since the orders were created (retention days).

The types of personal data that can be anonymized are:

- customer names, addresses, email addresses, and phone numbers (sold-to and ship-to) and sales orders and purchase orders
- vendor names, addresses, email addresses, and phone numbers
- Order Broker user names and email addresses
- Vendor user names and email addresses
- Store Connect associate names and email addresses
- brand contact names and email addresses

Orders and purchase orders are eligible to be anonymized only if they are no longer open, and a vendor is eligible to be anonymized only if there are no open purchase orders for the vendor. When a vendor is anonymized, it is flagged as inactive; however, Order Broker users, vendor users, and store associates are not automatically deactivated when they are anonymized.

For more information: See the *Operations Guide* for information on the web service requests that support inquiring on private data, inquiring on whether it is eligible to anonymize it, or requesting to anonymize it.

Time Zones

Overview: The time zones used for Order Broker include the following:

- *system time zone:* Set to UTC (Coordinated Universal Time). This time zone is used for dates and times in the database and web service responses.
- *retailer's time:* The Time Zone specified at the *Tenant (retailer information)* screen. This time zone is displayed on most Order Broker, Store Connect, and Vendor Portal screens and in generated email notifications. It is used for scheduling imports, exports, and report generation, and to calculate the number of orders for Maximum Daily Orders.
- *user's time:* The time zone on the user's personal computer or specified in the user's browser. In most cases, the times displayed on screens and indicated in emails are in the retailer's time rather than the user's time.

Example: **system time zone = UTC retailer's time zone = UTC - 5:00 (for example, U.S. Eastern Time) user's time zone = UTC - 8:00 (for example, U.S. Pacific Time)**

Event	Time Used or Displayed
order created	SubmitOrder response, database update, log entries: 2:00 (system time) Displayed on screens in Order Broker and Store Connect, such as order history: 7:00 (retailer's time) **Note:** When using a screen to search by date, such as searching based on order date, the retailer's time is used. For example, if an order was created at 01:00 (01:00 a.m.) June 29 system time, and 20:00 (10:00 p.m.) June 28 retailer's time, searching based on an order date of June 28 displays the order, while a creation date of June 29 does not.
imports scheduled and executed	**Schedule Jobs** screen: 13:00 (1:00 p.m.) (retailer's time) Database entry: 18:00 (6:00 p.m.) (system time) Confirmation email: 13:00 (1:00 p.m.) (retailer's time)
setting up probability locations	The From Date and To Date at the **Probability Location** screen: no time is displayed, but date is calculated based on retailer's time.

Changing the time zone: Whenever the Time Zone is changed at the Tenant screen, it is necessary to update all schedules, including imports, exports, report generation, polling, and notifications.

Exceptions: Screens that use the user's time rather than the retailer's time:

- Vendor Portal:
  - landing page: dates for calculation of updates and graphs
  - Purchase Order Shipping: default shipment date
  - Invoice: default invoice date

Also, the user's time applies when prompting on a calendar entry.

Localization Settings

The following table indicates the source of localization settings for Order Broker screens, reports, and emails. The currency, if indicated, is always from the order.

See the *Supplier Direct Fulfillment Overview* for information on localization settings used for the Vendor Portal, and see *Store Connect Overview* for information on localization settings used for Store Connect.

	Language	Data Formats
reports	organization; see the *Organizations* screen	organization
emails	organization	organization

	Language	Data Formats
screens	locale appended to URL (for example, ?locale=fr, where fr indicates French). Supported locales are: • en_US (US English, default) • de (German) • es (Spanish) • fr (French) • it (Italian) • ja (Japanese) • nl (Dutch) • pt_BR (Portuguese, Brazilian) • ru (Russian) • sv (Swedish) • zh_CN (Chinese)	user profile; see the *User Profile Configuration* screen

2 Setting Up Data for the Routing Engine Module

Purpose: Follow the steps below when completing data setup as part of Order Broker installation and configuration for use of the Routing Engine. You should log in to Order Broker as the default admin user to perform the following setup steps.

Other setup steps:

- See *Setting Up Data for the Supplier Direct Fulfillment Module* for setup required for drop ship.
- See *Setting Up Data for the Store Connect Module* for additional setup required for Store Connect.

> **Note:**
>
> All of the Routing Engine setup described in this help topic is also required to use Store Connect.

Allow list: The allow list is a list of URLs that are approved for communication. Oracle staff need to make sure that all URLs, such as logos and those used for integrations, are included on the allow list for Order Broker. See the description of the *allow list* in the glossary for more information.

"From" email addresses: Email addresses must be approved in order to be used as a return address on an email generated by Order Broker. Please change the default email addresses 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.

In this topic:

Basic Order Broker Setup:

- *Define tenant data*
- *Create the organization that will include your systems*
- *Create a default system for your organization*
- *Assign the default shipping system to the default user*
- *Create each additional system that will integrate through the Order Broker*
- *Configure one or more systems for online product and inventory update*
- *Create location types*
- *Specify event logging settings*
- *Optionally, create additional user roles*
- *Import users from IDCS or OCI IAM*

- *Set up web service authentication*
- *Set up schedules*

Set up Locations, Products, Inventory, and Related Information:

- *Create a location for each warehouse or store location that will be included in inventory inquiry requests or Routing Engine processing*
- *Upload proximity data*
- *Schedule product imports*
- *Load products, system products, product locations, and locations*
- *Create the default unfulfillable location*
- *Set up default carriers and, optionally, additional carriers*
- *Set up preferences for your organization*
- *Optionally, set up preference overrides for individual originating system, order type, and Express carrier combinations*
- *Test locate items searching*
- *Test order creation*
- *Optionally, create fulfillment zones to control the locations eligible to fulfill delivery orders based on shipping address*

Additional Optional Setup

- *Create probability rules*
- *Assign probability rules*
- *Test probability logic*
- *Set fulfillment options for systems*
- *Specify reserved statuses for systems*
- *Set up additional import and export options for systems*
- *Enable auto-cancellation of unclaimed orders*

For more information: See the *Glossary* and the *Order Broker Routing Engine Overview* for background.

Step	Procedure
Basic Order Broker Setup	
Define tenant data **About tenant data:** Use the Tenant screen to enter controlling information related to your instance of Order Broker.	• Select *Systems* > *Tenant* to advance to the *Tenant* screen. • Review and, optionally, change any of the information on the screen. Certain options at this screen are available only to the *admin user*.

Step	Procedure
Configure the organization that will include your systems **About organizations:** The organization is the second level in the Order Broker hierarchy, below the tenant. For example, all locate items searching and order creation takes place within the organization.	**Default organization:** A default organization is created in a newly provisioned Order Broker environment. The organization code and description is set to DEFAULT, and the locale is set to English United States. Optionally, you can use the Organizations screen in Modern View to change the locale.

Step	Procedure
Create a default system for your organization **About systems:** Each system in Order Broker represents an application, such as Order Management System or Xstore, that shares inventory information via Order Broker and creates cross-channel. orders. **About the default system:** The default system is the application that is the system of record for product creation and naming. The first system you create for an organization is automatically flagged as the default. **Note:** The system flagged as the Vendor Default should not be the default system for the organization.	• Select *Systems* > *Systems* to advance to the *Systems* screen. • Select an *organization* from the *Organization* drop-down box. See *Data Hierarchy* for more information on how systems are integrated within organizations. • 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. **Note:** 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. – Flagging the system as on-line or off-line and specifying the database connection information are described below. – 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 Order Broker 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.

Step	Procedure
Assign the default shipping system to the default user By assigning a default system, you indicate which system product codes to display and which organization to default on Order Broker screens. **Note:** You can create a user profile without assigning a default system only if you have not yet created any systems yet in Order Broker.	• Select *Systems* > *User Profiles* to advance to the *User Profiles* screen. • Select the edit icon ( ) next to the default admin user to advance to the *User Profile Configuration* screen. • At this screen, select the *Default Shipping System* to control the system product code to display when the default user reviews an order. • Click *Save*. **Note:** After completing this step, you can log out of Order Broker and log back in to have this system default at screens.
Create each additional system that will integrate through the Order Broker See *Setting Up Data for the Supplier Direct Fulfillment Module* for information on setting up the default vendor system, and see *Setting Up Data for the Store Connect Module* for information on setting up the default Store Connect system.	Use the instructions above under *Create a default system for your organization*, except do not flag the additional systems as the *Organization Default*.
Configure one or more systems for online product and inventory update **About online systems:** An online system is one that provides Order Broker with inventory updates for specific products when Order Broker requires the information (for example, in order to respond to a locate items request). This update can take place through a web service request or an interface program. **For more information:** See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* in the overview.	• Select *Systems* > *Systems* to advance to the *Systems* screen. • Select edit ( ) for the system to advance to the *System* screen. • Select the *Online* flag. • For RESTful service calls: Set the *Connection Type* to *URL*, and enter the *URL* for the remote system's web service.

Step	Procedure
Create location types **About location types:** Types must be 1 of 3 categories (store, vendor, or warehouse) and further identify a group of locations based on the system to which they belong, such as Order Management System warehouses and Xstore locations. At least one location type is required for you to set up locations.	• Select *Location Types* in Modern View to advance to the *Location Types* screen. • Enter a description of the location type in the *Location Type Description* field. The description cannot exceed 40 positions. • Enter a code for the location type in the *Location Type Code* field. The code cannot exceed 10 positions. • Select the correct category from the *Category* drop-down box. • Click *New*.

Specify event logging settings
About event logging: Oracle staff can specify whether to log different types of activity for Order Broker, and how much detail to include.
	Oracle staff use the *Event Logging* screen to set the level of logging for various activities and other Order Broker-wide settings.
	• Typically, Oracle staff set all *Event logging* options at this screen to *Detailed* until you have completed final configuration of Order Broker.
	• Typically, Oracle staff set the *XML logging* option to *Everything* until you have completed final configuration of Order Broker, including integration with all online systems.
	• Oracle staff complete the *Email Notifications* settings for each event.
	• Oracle staff complete the *Email Settings*:
	  – The *Administrative Email* address receives all email notifications.
	  – The *From Email* address appears as the originating email address for all email notifications.
	• Click *Update*.
	"From" email addresses: Email addresses must be approved in order to be used as a return address on an email generated by Order Broker. Please change the default email addresses at the **Event Logging** screen and contact your Oracle Representative to have the new email addresses approved.

Optionally, create additional user roles	Use the *Role Wizard* to review the roles delivered with Order Broker and make sure to review the authority associated with these roles prior to assigning them to a user.
Import users from IDCS or OCI IAM	Use the *Identity Cloud User Synchronization* job to import users from IDCS or OCI IAM. If you do not use this job, users that exist in IDCS or OCI IAM are created automatically in Order Broker when they first log in. See the *Identity Cloud User Synchronization* for more information.

Step	Procedure
Set up web service authentication **About web service authentication:** By setting up and requiring user IDs and passwords for web services, you confirm that Order Broker authenticates the identity of the system submitting web service messages. Web service authentication is required. If Order Broker 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`. **Note:** Each web service user must also be created in IDCS or OCI IAM to support authentication.	Use the *Web Service User* screen to create web service users for authentication. See these screens for details.
Set up schedules **Note:** Do not attempt to schedule jobs before creating systems.	Use the *Schedule Jobs* screen to schedule daily cleanup, email generation, auto-cancel unclaimed pickup orders, and the sales order data extract. Then use the *Reschedule All* option at the *View Active Schedules* screen to enable all scheduled jobs and programs, including those configured at the *Schedule Jobs* screen and elsewhere. Note that the *Reschedule All* option does not restart jobs that are temporarily in Paused status (⊘). Order Broker restarts these jobs automatically.
Set up Locations, Products, Inventory, and Related Information	

Step	Procedure
Create a location for each warehouse or store location that will be included in inventory inquiry requests or Routing Engine processing **About locations:** A location can represent a store, a warehouse, or a virtual location such as a web storefront. Each location is associated with an integrated system. Locations search for inventory in other locations, and can create or fulfill orders through the Routing Engine.	Typically, you create locations through integrations with external systems. For example, locations might be created as part of the product import process; see *Importing Locations through File Storage API*. You can also create locations directly in Order Broker: • Select *Locations* > *Locations* to advance to the Locations screen. • Select your organization at the *Organization* drop-down box. • Select the location type from the *Type* drop-down box. • Enter a code identifying the location. The code cannot exceed 10 positions. • Enter a name for the location in the *Name* field. The name cannot exceed 40 positions. • Select the system from the *System* drop-down box. • Click *New* to advance to the New Location screen. **Note:** If you will be using proximity searching for this organization, you need to enter both a postal code and a country code. If a submit order request for a pickup order originates from a location without an address that includes a valid postal code, Order Broker returns an error indicating that the location does not have sufficient inventory of the requested item. The remaining fields on this screen are informational only. • Click *Save*. **Order Management System integration:** • For warehouses in Order Management System, you might want to include only allocatable warehouses. • The code you enter for an Order Management System warehouse should be the same as the warehouse code from the *OROB Location* field in Order Management System; however, the name does not need to be the same as the warehouse description in Order Management System. *Setting up the sort order:* The sort at the Preferences and Probability Location screens is in alphanumeric order within each organization. In other words, location types are listed alphanumerically by name within an organization, as are locations within a location type. Since the sort is alphanumeric, numeric codes are listed before alphabetical codes; for example, location *123* is listed before location *ABC*.

Step	Procedure
Upload proximity data **About proximity data:** If you are not using the *Oracle Maps Cloud Service*, uploading 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 and are not using the *Oracle Maps Cloud Service*. You can also perform this step at a later time. **For more information:** See *Proximity Locator Searching*.	If you are using *proximity locator* searching to restrict locate items searches to the customer's area and are not using the *Oracle Maps Cloud Service*, obtain the required `.CSV` file of postal code information and then use the *Proximity Uploads* screen to upload that information into the *proximity location table*: • Select the *Canada*, *International*, or *United States* from the *Proximity Data Type* drop-down list. • Use the *Browse...* button to select the `.CSV` file on your local computer. • Click *Upload*. Wait until the upload status is completed.
Schedule product imports **About product imports:** The automated import process enables you to import and update product and inventory information from an integrated system. See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for a process overview.	Select *System* > *Schedule Jobs* to advance to the *Schedule Jobs* screen, and complete the steps described under *Product Import* to set up, change, or review the import schedule for a system or run the import on demand. **Note:** **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.
Load products, system products, product locations, and locations	Consult the integrating system's documentation and complete the steps described under *Scheduling the Product Import Job* for systems that support the import process, including Order Management System.

Step	Procedure
Create 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. **Note:** This location needs to be associated with the organization's default system.	Typically, you create locations through integrations with external systems. For example, locations might be created as part of the product import process; see *Importing Locations through File Storage API*. You can also create locations directly in Order Broker: • Select *Locations* > *Locations* to advance to the *Locations* screen. • Select your organization at the *Organization* drop-down box. • Select the location type from the *Type* drop-down box. • Enter a location code. The code cannot exceed 10 positions. • Enter a name for the location in the *Name* field. The name cannot exceed 40 positions. • Select the default system for your organization from the *System* drop-down box. • Click *New* to advance to the *New Location* screen. • Click *Update* to save your entries. Set preferences for the default location to exclude it from locate item requests and order assignments: • Select *Organizations and* > *Preferences* to advance to the *Preferences* screen. • Advance to the default location and highlight it in the left-hand pane. • Set all of the displayed Yes/No options under *Fulfillment* (including *Pickup Available*, *Delivery Available*, *Ship For Pickup Sourcing Available*, *Ship For Pickup Receiving/Pickup Available*, and *Backorder Available*) to *No*. • Click *Update* to save your entries.

Step	Procedure
Set up default carriers 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. The default PICKUP carrier is created automatically when a SubmitOrder request is received. If the Submit Order message creating a delivery order: • specifies a `ship_via` that matches a carrier you have set up through the *Carriers* screen in Modern View, Order Broker 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 in Modern View, Order Broker creates the carrier and uses this carrier on the order • does not specify a `ship_via`, Order Broker uses the default carrier you specify at the *Preferences* screen • For a pickup order, Order Broker uses the default PICKUP carrier, regardless of whether a `ship_via` is passed in the Submit Order message.	The following steps are required if you want to override the default carrier created during the installation or upgrade process: • Advance to the Carriers screen in Modern View. • Optionally, enter a Code and Description. If you do not enter them here, you can enter them at the *New Carrier* window in Modern View. • Click *New* to advance to the *New Carrier* window in Modern View. • Repeat the steps above to create a PICKUP carrier. Order Broker requires this carrier in order to begin processing pickup orders. • Select *Organizations and Preferences* and click the Order Broker Preferences icon () for your organization to advance to the *Preferences* screen, and change the Default Carrier to the new carrier you have just created.

Step	Procedure
Set 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.	• Select *Organizations and Preferences* and click the Order Broker Preferences icon ( ) for your organization to advance to the *Preferences* screen. • Set the preferences for the organization. See the *Preferences* screen for field descriptions. You can return to the *Preferences* screen later to reset any existing preferences. • Click *Save*. **Note:** **Important:** You need to set all Order Broker preferences at the organization level before integrating any external systems with Order Broker. See the description of the Preferences screen for complete information on setting preferences.
Optionally, set up preference overrides for individual originating system, order type, and Express carrier combinations **About preference overrides:** Use the **Order Broker Preference Overrides** screen to override the Order Broker preference settings that control sorting results for locate items searches and order assignment.	Advance to the *Order Broker Preference Overrides* screen, where you can set up overrides to the Order Broker sort criteria set at the **Preferences** screen. *Example:* You can have the Routing Engine rank locations for a pickup request based first on proximity, while it ranks locations for a delivery request based first on available quantity.
Test locate items searching	Test searching for products, either from an integrated system or using a standalone testing tool such as soapUI (www.soapUI.org). Confirm that the products returned and their sort order are what you expect. **Note:** If Order Broker is not returning any locations to locate items requests, confirm that you have completed the steps described under *Set up default carriers and, optionally, additional carriers*.
Test order creation	Test creating new orders, either sending them from an integrated system or using a standalone testing tool such as soapUI (www.soapUI.org). Confirm that the orders are created as you expect, and that updates are processed correctly across the integrated systems.

Step	Procedure
Optionally, create fulfillment zones to control the locations eligible to fulfill delivery orders based on shipping address	• Use the *Fulfillment Zone Wizard* to create zones based on the shipping addresses for delivery orders, indicating the locations eligible to fulfill these orders. • Use the *Preferences* screen to select the Use Zone Fulfillment preference.
Additional Optional Setup	
Create probability rules **About probability rules:** You can use probability rules to control the information returned in merchandise search results or that the Routing Engine uses to determine where to assign orders; for example, you can apply rules to reduce the available quantity indicated for certain products, or to exclude certain product locations temporarily from search results.	Optionally, use the *Probability Rules* screen to create rules that you can apply for locate items searches and order creation. See that screen for more information.
Assign probability rules	Optionally, use the *Probability Location* screen to assign probability rules to locations, location types, or the organization.
Test probability logic	Test locate items searching and creating new orders to confirm that the probability rules you have set up and assigned are producing the results you expect.
Set fulfillment options for systems **About system fulfillment options:**You can flag a system to require a status update from each assigned fulfilling location after it polls for new orders through the fulfillments request message. When you flag a system to require status updates, you also indicate the number of times that an order can be included in the fulfillments request until you include it in a notification email to your system administrator.	Optionally, use the *System* screen to set the fulfillment options to indicate whether Order Broker requires a status update from the system for new orders. See *Require Status Update for Assigned Orders?* for a discussion.
Specify reserved statuses for systems	Optionally, use the *System* to specify order or order line statuses to subtract from the total available quantity for a product location, indicating that orders in these statuses are considered reserved. **For more information:** See *Calculating the Available to Promise Quantity* for an overview.

Step	Procedure
Set up additional import and export options for systems	Optionally, use the *Schedule Jobs* to set up: • *Fulfilled Inventory Export* • *Inventory Quantity Export* • *Sales Order Data Extract* • *Incremental Inventory Import* • *Product Import*
Enable auto-cancellation of unclaimed orders	Optionally, use the *Preferences* screen to set up auto-cancellation of unclaimed pickup or ship-for-pickup orders: • *Auto Cancel Days of Unclaimed Pickup Orders* • *Auto Cancel Days of Unclaimed Ship For Pickup Orders* • *Auto Cancel Reason* • Also, use the *Schedule Jobs* screen to schedule the *Auto Cancel Unclaimed Pickup Orders* job.

3 Supplier Direct Fulfillment Overview

Purpose: Use Order Broker's Supplier Direct Fulfillment module to manage the fulfillment of drop ship purchase orders. The module provides a means to communicate with your vendors in the assignment and fulfillment of drop ship orders.

Compatibility: The Supplier Direct Fulfillment module is compatible with version 4.0+ of Order Management System, and version 13.0 of CWDirect. It is also compatible with version 17.0+ of CWDirect.

About the Routing Engine: See the *Order Broker Routing Engine Overview*.

In this topic:

Drop Ship Process Flow

Purpose: The basic process flow for purchase order fulfillment through the Supplier Direct Fulfillment module is described below:

- *Purchase Order Creation*
- *Purchase Order Fulfillment*

- *Updates to Purchase Orders*
- *Invoicing*
- *Email Notifications*
- *Reporting*

Purchase Order Creation

Create purchase orders in the originating system and send to Routing Engine: When you create a purchase order to fulfill a drop ship item on a sales order, the system (such as Order Management System or CWDirect) sends the *CreateDSOrder* message to Order Broker. When this message creates the purchase order in Order Broker, Order Broker can notify the vendor by email, or the vendor receives notification of new purchase orders after logging into the *Vendor Portal*.

Information included in the purchase order: The purchase order information sent to the vendor includes the retail brand, sold-to and ship-to customer names and addresses, order totals, carrier, and information on the drop ship items to fulfill, including special handling instructions and order and detail messages.

When Order Broker receives the *CreateDSOrder* message, in addition to creating the purchase order it also creates:

- the vendor, if it doesn't already exist; however, you need to complete entry of additional vendor information, including vendor preferences and creating any vendor users to have access to the Vendor Portal.
- the carrier, if it doesn't already exist; however, you might want to rename the carrier and modify the information required at shipment confirmation and its assignment to vendors.
- the product(s), if the requesting system is the default for the organization.
- the vendor item(s).

See *Setting Up Data for the Supplier Direct Fulfillment Module* for more information on configuring vendors, vendor users, and carriers.

Purchase Order Fulfillment

Vendor generates pack slips: Using the *Vendor Portal*, the vendor can generate a PDF version of a pack slip, a CSV file containing pack slip data, or both. The vendor can also generate a batch pull sheet document to use when picking stock for the purchase order. You can include your brand logo on a graphical version of the pack slip, or the vendor can generate a nongraphical pack slip if using pre-printed forms. You can also include a pack slip message.

See *Vendor Integration* for an overview on how a vendor can receive and confirm shipment of invoices through XML and JSON messages rather than through Vendor Portal screens.

Vendor confirms shipment: The vendor can confirm shipment using a screen at the *Vendor Portal*, or can upload a CSV file containing shipment confirmation data. Confirmation through an integrated shipping system, such as ADSI, is available; in this situation, you must specify the shipping weight and box dimensions. You can specify the information required for each carrier, such as tracking number, rate, and weight; also, you can select the carriers to assign to each vendor.

Updates to Purchase Orders

Sending changes and updates to the vendor: Optionally, you can send address updates or cancellation requests to the vendor through the Supplier Direct Fulfillment module.

- *Address updates:* When you change the shipping address on an order, Order Management System or CWDirect sends a *SetDSAddress Change* request message. If:
  - the vendor has not yet generated a pack slip for the purchase order or performed any other updates, the address update applies automatically.
  - the pack slip is in process but not yet shipped, the vendor needs to approve or reject the address change.
  - the pack slip is shipped or canceled, the address change is rejected automatically.
  - The *SetDSAddress Change* message specifies whether to change both the sold-to and ship-to address, or just the ship-to address.
- *Cancellation requests:* When you select to cancel a drop-shipped item, a system such as Order Management System or CWDirect sends a *setDSCancel* request message. If:
  - the vendor has not yet generated a pack slip for the item or performed any other updates, the line is canceled automatically.
  - the item is in process but not yet shipped, the vendor needs to approve or reject the cancellation request.
  - the item is already shipped or canceled, the cancellation is rejected automatically.
- *Cost updates:* If you change the cost of a line on a purchase order, a system such as Order Management System or CWDirect sends a *setDSCostChange* request message. If:
  - the vendor has not yet generated a pack slip for the item or performed any other updates, the line is canceled automatically.
  - the item is already shipped or canceled, the cancellation is rejected automatically.
  - Unlike address changes and cancellation requests, cost changes do not require the vendor's approval or rejection, even if the line is in process.

Vendor updates to purchase orders: Using the *Vendor Portal*, the vendor can:

- put a purchase order line on hold or release it from hold
- change the due date for a purchase order line
- enter a comment about the purchase order line
- void and reprint a pack slip, including reducing the quantity of a purchase order line

Checking purchase order status: Originating systems such as Order Management System or CWDirect use the *getDSChanges* message to periodically request purchase order updates. Order Broker returns details on purchase order activity by vendors since the last request message was processed. Optionally, the originating system can indicate the maximum number of transactions to include in the response.

Invoicing

If you provide the vendor with authority to invoicing, the vendor can generate invoices either when confirming shipment at the *Vendor Portal* screen, or as a separate step for one or more shipments.

Invoice process flow:

- **Invoice creation:** The vendor can create invoices using Vendor Portal screens or by uploading a CSV file. Each invoice can include shipments for one or more purchase orders. The default information on the invoice includes the original PO unit cost and does not include any payment terms or freight, handling, or other charges at the header or detail level; however, the vendor can override these defaults.
- **Held invoice?** If the vendor does not override any of the default information, the invoice is created in *Approved* status and is eligible for posting to the originating system immediately. If the vendor overrides a PO unit cost beyond a threshold you specify, the invoice line is *out-of-balance* and the invoice is created in *Held* status. You need to review each *Held* invoice and either accept or reject it. Accepted invoices post to the originating system, while rejected invoices return to the vendor. The vendor can then edit the invoice or delete it.

Posting invoices: Originating systems use the *getDSInvoices* message to periodically request any new invoices posted by vendors. Order Broker returns details on invoices posted since the last request message was processed. Optionally, the originating system can indicate the maximum number of invoices to include in the response.

> **Note:**
>
> Order Management System 15.0 and later does not support the invoicing integration.

Email Notifications

You can have Order Broker generate email notifications to:

- your staff, when the vendor changes a purchase order or line or submits an *out-of-balance* invoice, or when a shipment or upload invoice fails
- vendors, when you generate new purchase orders, send an address change or cancellation request, respond to an *out-of-balance* invoice, or when a shipment or upload invoice fails

See *Supplier Direct Fulfillment Module Email Notifications Summary* for more information.

Reporting

The Supplier Direct Fulfillment module includes the following reports:

- *PO Item Status Report*
- *Vendor Aging Detail Report*
- *Vendor Aging Summary Report*
- *Invoice Detail Report*
- See *Reporting Options* for an overview on how to generate and schedule reports.

Purchase order inquiry: You can use the *Purchase Order Inquiry* screen to select purchase orders for review.

Setting up data for drop ship: See *Setting Up Data for the Supplier Direct Fulfillment Module* for information on the setup required in Order Broker before you can start using the Supplier Direct Fulfillment module, including brands, carriers, vendors, vendor users, and the roles that control their authority.

Vendor Portal

Purpose: The Vendor Portal is a site where your drop ship vendors can log in and, depending on the individual's authority:

- review current information on the purchase orders assigned to them for fulfillment and their current status
- generate PDF pack slips for purchase orders or download CSV files, using a variety of selection options
- confirm shipment of purchase orders
- select individual purchase orders for inquiry
- hold or release purchase order lines
- change the due dates for purchase order lines
- accept or reject address change and cancel requests for purchase orders that are currently in process
- review and change configuration settings, such as pack slip output format and email addresses for purchase order notifications

Each *vendor user* sees only the purchase orders assigned to his or her own vendor for fulfillment.

The Vendor Portal resides outside your firewall so that it is accessible to vendors.

Landing page: When the vendor user logs into the Vendor Portal, the landing page includes:

- a pie chart summarizing the percentage of purchase orders with current, future, late, or very late due dates
- a bar chart summarizing the number of purchase orders received by the vendor for each day in the past week
- a bar chart summarizing the number of purchase orders shipped by the vendor for each day in the past week

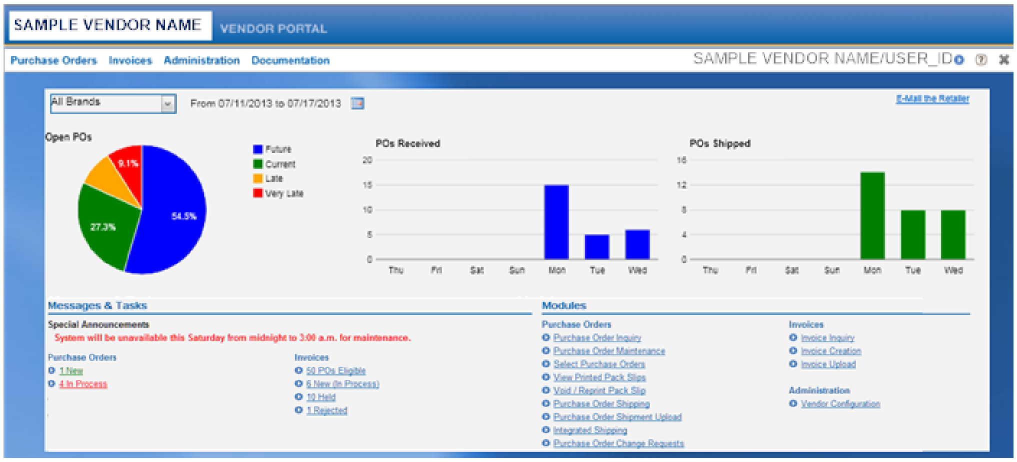
> **Note:**
>
> The vendor can restrict the chart data to a specific brand. Also, the vendor can change the range of dates included in the bar charts.

- an email link to contact you, if you have specified one
- a current special announcement from you, if you have specified one

Depending on the vendor user's authority:

- current totals of purchase orders by status, with links to related screens where the vendor can work with the purchase orders
- current totals of invoices by status and purchase orders eligible for invoicing, with links to related screens where the vendor can work with invoices
- links to all modules which the vendor user has authority to use

Links to unauthorized modules are grayed out.



> **Note:**
>
> The Vendor Portal requires access to the Internet to display the charts and graphs.

For more information: See *Information on the Vendor Portal landing page* for descriptions of the contents of the landing page.

Vendor Integration

Overview: A vendor can receive and confirm shipment of drop ship purchase orders by:

- using the screens in the Vendor Portal for all activities, or
- using the vendor integration between Order Broker and the vendor's system.

A vendor can also use a combination of these options; for example, the vendor can receive purchase orders through the vendor integration, and also use the Vendor Portal screens to confirm shipments and update purchase orders.

Included in the vendor integration: The vendor integration includes:

- sending batches of new purchase orders to the vendor's system when the vendor's system requests them
- enabling the vendor's system to acknowledge receipt of a batch of purchase orders
- confirming shipments of purchase orders, including the carrier (ship via) used, tracking number, weight, shipment date, and freight charges

Not included in the vendor integration: The vendor integration does not include:

- modifying purchase orders, such as changing expected ship dates or putting a line on hold
- accepting or rejecting address changes or cancellation requests from the retailer

- receiving cost changes from the retailer
- generating invoices and submitting them to the retailer

Each of these options is available in the Vendor Portal if the vendor user has authority.

Mapping to the vendor's system: The vendor can use the messages described in the *Vendor Integration Guide* to map to the vendor's system, or contact a Oracle representative for information on creating unique maps.

JSON messages: The vendor integration uses the JSON (JavaScript Object Notation) format for its messages.

For more information: See the *Vendor Integration Guide* for details, and see the *Preferences tab* at the Create Vendor or Edit Vendor screen for related configuration.

Supplier Direct Fulfillment Module Email Notifications Summary

A summary of the email notifications to the retailer and the vendor are described in the table below.

Notification Type	Generated When:	Setup
Retailer Notifications		**"From" email address:** From the *From Email* address specified at the *Event Logging* screen. **Localization:** The language and data formats used in retailer email notifications are from the organization settings. See the *Organizations* screen for more information.
Change notification emails to retailer	The vendor maintains a purchase order or line, including: • holding a purchase order line • releasing a purchase order line • changing the due date on a purchase order line • entering a reason description for a purchase order line without changing its hold status or due date • denying an address change or cancellation request **Note:** This email is generated when an address change does not apply to all items on the purchase order, even if one or more items are updated with the address change.	*PO Status Notification* setting at the *Email* tab of the *Drop Ship Preferences* screen
Shipment or invoice upload error notification email to retailer	The vendor attempts to upload a CSV file of shipment confirmations or invoices, and there are any errors. **Note:** The upload files in error are saved in the OROB-ERRORS container of the FILE_STORAGE table.	*Upload Error Notification* setting at the *Email* tab of the *Drop Ship Preferences* screen

Notification Type	Generated When:	Setup
Out-of-balance invoice notification email to retailer	The vendor uploads or creates an invoice that includes at least one line that is *out-of-balance*.	*Invoice Balance Notification* setting at the *Email* tab of the *Drop Ship Preferences* screen

Notification Type	Generated When:	Setup
Vendor Notifications		**Vendor Portal link included in emails:** Each email to the vendor includes a link to the Vendor Portal. Use the VPA Url setting at the *Drop Ship Preferences* screen to specify the URL to include. **"From" email address:** From the *From Email* address specified at the *Event Logging* screen. **Localization:** The Language specified at the *Preferences* tab of the *New Vendor* or **Edit Vendor** screen is used for the following emails sent to the vendor. The data formats specified at this tab are also used. **Note:** The VPA Url does not automa

Notification Type	Generated When:	Setup
		tically append the vendor’s locale to the link embedded in the emai

Notification Type	Generated When:	Setup
		l. The same URL is embedded for all vendors.
New purchase order notification email to vendor	One or more new purchase orders are received by Order Broker and ready for fulfillment by the vendor.	*PO Notification* setting at the *Email* folder of the *Preferences* tab of the *New Vendor* or **Edit Vendor** screen
Shipment or invoice upload error notification email to vendor	The vendor attempts to upload a CSV file of shipment confirmations or invoices, and there are any errors.	*Upload Error Notification* setting at the *Email* folder of the *Preferences* tab of the *New Vendor* or **Edit Vendor** screen
Out-of-balance invoices approved or rejected notification email to vendor	The retailer approves or rejects an *out-of-balance* invoice submitted by the vendor.	*Invoice Balance Notification* setting at the *Email* folder of the *Preferences* tab of the *New Vendor* or **Edit Vendor** screen

Notification Type	Generated When:	Setup
Change request (address change or cancellation) notification email to vendor	The shipping address changes for a purchase order, or the retailer requests a purchase order line cancellation.	*PO Notification* setting at the *Email* folder of the *Preferences* tab of the *New Vendor* or **Edit Vendor** screen
Cost change notification email to vendor	The retailer changes the cost of a purchase order line.	*PO Notification* setting at the *Email* folder of the *Preferences* tab of the *New Vendor* or **Edit Vendor** screen

Change notification emails to retailer

Drop ship orders changed by the vendor

- *Subject line:* Drop Ship Orders Changed by [Vendor Name]
- *Sample contents:*

  Vendor: [Vendor Name]

  The following drop ship orders have been changed.

Order Number	PO Number	Line	Item	Description	Status	Orig Due Date	New Due Date	Reason
12223	456	1	BUGHAT	CUTE BABY BUG HAT	Held	03/03/2017	38/31/2017	processing delay
12223	456	2	SCARFRED	FAIR TRADE COTTON SCARF	In Process	03/03/2017	03/04/2017	processing delay

The date format is from the setting for the organization. See the *Organizations* screen for more information on data formats.

Cancellations denied by the vendor

– *Subject line:* Denied Cancellations by [Vendor Name]

– *Sample contents:*

Vendor: [Vendor Name]

The following drop ship order cancellation request(s) were denied.

Order Number	PO Number	Line	Item	Description
12220	453	1	BUGHAT	CUTE BABY BUG HAT

Address changes declined by the vendor

Subject line: Address Changes Declined By [Vendor Name]

Sample contents:

Vendor: [Vendor Name]

The following drop ship order address change(s) were declined.

Order Number	PO Number
12218	450

> **Note:**
>
> This email is generated when an address change does not apply to all items on the purchase order, even if one or more items are updated with the address change.

Shipment or invoice upload error notification email to retailer

Shipment upload error

- *Subject line:* Shipment Upload in Error from [Vendor Name]
- *Sample contents:*

  Vendor: [Vendor Name]

  Shipment upload could not process.

  Error: 3032 - Invalid Carrier (1) is not associated to vendor (MNO).

> **Note:**
>
> The description of the error is not translated.

Invoice upload error

Subject line: Invoice Upload in Error from [Vendor Name]

Sample contents:

Vendor: [Vendor Name]

Invoice upload could not process.

Error: Invalid PO number: 403 Data: DETAIL,403,1,,,BU1234,1.12345,2.12345,3.12345,other desc,1.09,1

> **Note:**
>
> The description of the error is not translated.

For more information: See the Vendor Portal online help, available from the Order Broker home screen, for more information on shipment or invoice upload errors.

Out-of-balance invoice notification email to retailer

- *Subject line:* Out of Balance Invoice from [Vendor Name]

- *Sample contents:*

  Vendor: [Vendor Name]

  An out of balance invoice has been confirmed. Access the Invoice Inquiry menu option to approve or reject held invoices.

New purchase order notification email to vendor

- *Subject line:* New PO Notification from [Retailer Name]
- *Sample contents:*

Organization: EZK Organization (http://servername.example.com/LocateVPA/)

New purchase orders are ready to be fulfilled.

> **Note:**
>
> Use the VPA Url setting at the *Drop Ship Preferences* screen to specify the link to the *Vendor Portal* to include in email notifications to the vendor. The VPA Url does not automatically append the vendor's locale to the link embedded in the email. The same URL is embedded for all vendors.

Shipment or invoice upload error notification email to vendor

Shipment upload error

- *Subject line:* Shipment Upload Error from [Retailer Name]
- *Sample contents:*

Shipment upload could not process.

Error: 3032 - Invalid Carrier (1) is not associated to vendor (MNO).

Invoice error

Subject line: Invoice Upload Error

Sample contents:

Invoice upload could not process.

Error: Invalid PO number: 403 Data:
DETAIL,403,1,,,BU1234,1.12345,2.12345,3.12345,other desc,1.09,1

Out-of-balance invoices approved or rejected notification email to vendor

- *Subject line:* Out of Balance Invoices Approved or Rejected by [Retailer Name]
- *Sample contents:*

  Organization: [Retailer Name] (http://servername.example.com/LocateVPA/)

  Out of balance invoices have been approved or rejected.

Invoice Number	Invoice Status
LOC-1108E	Posted

> **Note:**
>
> Use the VPA Url setting at the *Drop Ship Preferences* screen to specify the link to the *Vendor Portal* to include in email notifications to the vendor. The VPA Url does not automatically append the vendor's locale to the link embedded in the email. The same URL is embedded for all vendors.

Change request (address change or cancellation) notification email to vendor

- *Subject line:* Change Requests from [Retailer Name]
- *Sample contents:*

Organization: [Retailer Name] (http://servername.example.com/LocateVPA/)

Purchase orders have requested changes. Access the Purchase Order Change Request menu option to accept or decline changes.

> **Note:**
>
> Use the VPA Url setting at the *Drop Ship Preferences* screen to specify the link to the *Vendor Portal* to include in email notifications to the vendor. The VPA Url does not automatically append the vendor's locale to the link embedded in the email. The same URL is embedded for all vendors.

Cost change notification email to vendor

- *Subject line:* Cost Changes from [Retailer Name]
- *Sample contents:*

  Organization: [Retailer Name] (http://servername.example.com/LocateVPA/)

  The following purchase orders have cost changes.

Order Number	PO Number	Line	Item	Description	Cost Before	Cost After
12434-001	664	1	V257BUGHAT	CUTE BUG HAT BABY	$1.00	$1.23

Localization Settings

The following table indicates the source of localization settings for Supplier Direct Fulfillment screens, print output, and emails. The currency, if indicated, is always from the purchase order.

See the *Order Broker Routing Engine Overview* for information on localization settings used Order Broker foundation, and see *Store Connect Overview* for information on localization settings used for Store Connect.

	Language	Data Formats
emails to retailer	organization; see the *Organizations* screen	N/A

	Language	Data Formats
emails to vendor	vendor; see *Edit Vendor* screen	vendor
screens	locale appended to URL (for example, `?locale=fr`)	vendor
pack slips	organization	organization
pull sheets	vendor	vendor

4 Setting Up Data for the Supplier Direct Fulfillment Module

Purpose: Follow the steps below at Order Broker screens when completing data setup for the Supplier Direct Fulfillment module as part of Order Broker configuration.

Before you start: When setting up data, you typically log into Order Broker as the default admin user. If you are setting up data for an additional organization in Order Broker and are not using the default admin user login, you need full authority to all secured features based on the roles assigned to the user profile. See the *Role Wizard* and the *User Profile Configuration* screen for background.

Integrated shipping setup: See *Integrated Shipping Setup, Troubleshooting, and Mapping: Supplier Direct Fulfillment* for information on the setup required for integrated shipping with ADSI.

Allow list: The allow list is a list of URLs that are approved for communication. Oracle staff need to make sure that all URLs, such as logos and those used for integrations, are included on the allow list for Order Broker. See the description of the *allow list* in the glossary for more information.

Vendor integration: See the *Vendor Integration Guide* for information on required setup for integrated vendors. This document is available from the *Documentation* area of the *Home Screen*

In this topic:

- *Basic Organizational Setup*
  - Create the organization that will include your system and vendors for the Supplier Direct Fulfillment module.
  - Create a default system for your organization to correspond to the system originating drop ship purchase orders.
  - Create a location type for the system originating drop ship purchase orders.
  - Specify event logging settings.
  - Optionally, create additional retailer user profiles.
  - Create a location representing your main warehouse in your originating system.
- *Supplier Direct Fulfillment Setup*
  - Set up drop ship preferences for your organization.
  - Create the default vendor system.
  - Create at least one brand.
  - Create vendors and set preferences.
  - Create vendor users.
  - Create carriers.

- Set up web service authentication for integrated vendors
- *Information on the Vendor Portal landing page*

Step	Procedure
Basic Organizational Setup	The following steps are required if you are setting up an organization in Order Broker for use of the Supplier Direct Fulfillment module. Not all steps are required if you already have completed setup for use of the Order Broker module.
Define tenant data **About tenant data: Use the Tenant screen to specify the modules you use and other information related to your installation of Order Broker.** **Note:** This step may not be necessary if you have already completed configuration for the Order Broker for this organization.	• Select *Systems* > *Tenant* to advance to the *Tenant* screen. • Review and, optionally, change any of the information on the screen.
Create the organization that will include your system and vendors for the Supplier Direct Fulfillment module. **About organizations:** The organization is the second level in the Order Broker hierarchy, below the tenant. All drop ship setup and purchase order creation takes place within the organization. **Note:** This step is not necessary if you have already completed configuration for the Order Broker for this organization.	• Select *Locations* > *Organizations and Preferences* to advance to 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* to create the organization.

Step	Procedure
Create a default system for your organization to correspond to the system originating drop ship purchase orders. **About systems and the default system:** Each system in Order Broker represents a group of data in application, such as a company in Order Management System or CWDirect, and is required both for Order Broker usage and for Supplier Direct Fulfillment. The first system you create for an organization is automatically flagged as the default. **Note:** This step is not necessary if you have already completed configuration for the Order Broker for this system.	• Select *Systems* > *Systems* to advance to the Systems screen. • Select your 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. • *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) system control value. However, names for systems do not need to be the same as the Order Management System or CWDirect company descriptions. • Click *NEW*. • At the System screen, to complete the creation of the system, click *Save*. **Note:** – It is not necessary to flag the system as on-line if you are using Supplier Direct Fulfillment and not the Order Broker, or to select any other options or enter any other data for the system. – 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.
Assign the default shipping system to the default admin user. **Note:** This step is not necessary if you have already completed configuration for the Order Broker or already created another system for Supplier Direct Fulfillment.	• Select *Systems* > *User Profiles* to advance to the User Profiles screen. • Select the edit icon ( ) next to the default admin user to advance to the User Profile Configuration screen. • At this screen, select the *Default Shipping System* to control the system product code to display when the default admin user reviews an order. Click *Save*.

<table>
<tr><th>Step</th><th>Procedure</th></tr>
<tr><td>Create a location type for the system originating drop ship purchase orders.
About location types: Types must be 1 of 3 categories (store, vendor, or warehouse) and further identify a group of locations based on the system to which they belong, such as Order Management System or CWDirect warehouses and Xstore locations.

Note: This step is not necessary if you have already completed configuration for the Order Broker for this organization.</td><td>Select Location Types in Modern View to advance to the Location Types screen.
Enter a description of the location type in the Location Type Description field. The description cannot exceed 40 positions.
Enter a code for the location type in the Location Type Code field. The code cannot exceed 10 positions.
Select the correct category from the Category drop-down box. Typically, you would select a Category of Warehouse to identify the locations.
Click New.</td></tr>
<tr><td>Create a location representing your main warehouse in your originating system.
About locations: A location can represent a store, a warehouse, or a virtual location such as a web storefront. Each location is associated with an integrated system, such as Order Management System or CWDirect.

Note: This step is not necessary if you have already completed configuration for the Order Broker for this organization.</td><td>Select Locations > Locations to advance to the Locations screen.
Select your organization at the Organization drop-down box.
Select the location type you created earlier from the Type drop-down box.
Enter a Code identifying the location. The code cannot exceed 10 positions and should match the warehouse code in the originating system, such as CWDirect or Order Management System.
Enter a name for the location in the Name field. The name cannot exceed 40 positions.
Select the system from the System drop-down box.
Click NEW to advance to the New Location screen. It is not necessary to enter additional information about the location.
Click Save.</td></tr>
<tr><td>Specify event logging settings.
About event logging: Oracle staff can specify whether to log different types of activity for Order Broker, and how much detail to include.

Note: This step is not necessary if you have already completed configuration for the Order Broker or Supplier Direct Fulfillment for another organization.</td><td>Oracle staff use the Event Logging screen to set the level of logging for various activities.
Typically, Oracle staff set all Event logging options at this screen to Detailed until you have completed final configuration of Order Broker.
Typically, Oracle staff set the XML logging option to Everything until you have completed final configuration of Supplier Direct Fulfillment.
Oracle staff complete the Email Notifications settings for each event.
Oracle staff complete the Email Settings:
The Administrative Email address receives all email notifications.
The From Email address appears as the originating email address for all email notifications.
Click Update.</td></tr>
</table>

Step	Procedure
Create roles for retailer users. **Note:** This step is not necessary if you have already completed configuration for the Order Broker for this organization.	• Select *Systems* > *Roles* to advance to the Roles screen. • Click *NEW* to advance to the Role Wizard. • Use the *Role Wizard* to create roles for retailer user who need to manage the drop ship process.
Optionally, create additional retailer user profiles. **About user profiles:** Follow these steps to enable users to log into Order Broker, and to set authority levels controlling the screens available to each user.	Set up users in IDCS or OCI IAM and import them through the process described under Import users from IDCS or OCI IAM.
Supplier Direct Fulfillment Setup	The following steps are required regardless of whether you have already completed setup for the Order Broker module.
Set up drop ship preferences for your organization. **About drop ship preferences:** Use the **Drop Ship Preferences** screen to set rules governing locate item searching and order assignment as well as the logo to display on the Vendor Portal and the link to the Vendor Portal to include in email notifications. You can set preferences at the organization, location type, and location level.	• Select *Organizations and Preferences* and click the *Drop Ship Preferences* icon () for your organization to advance to the Drop Ship Preferences screen. • See the Drop Ship Preferences screen for field descriptions. You can return to the Drop Ship Preferences screen later to reset any existing preferences. Also, see Information on the Vendor Portal landing page for a sample of the Vendor Portal landing page with descriptions of the displayed data. • **For more information:** See Integrated Shipping Setup, Troubleshooting, and Mapping: Supplier Direct Fulfillment for information on the setup required for integrated shipping through ADSI. **Note:** Oracle staff need to make sure that any external URLs are added to the allow list. **Important:** You need to open the Drop Ship Preferences screen and click *Save* for your preference settings to take effect.
Create the default vendor system. **About the default vendor system:** The Supplier Direct Fulfillment module requires you to create a default vendor system for your organization before you can create any vendors in Order Broker. **Note:** The system flagged as the Vendor Default should not be the default system for the organization.	• Select *Systems* > *Systems* to advance to the Systems screen. • Optionally, select a different 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. • Click *NEW*. • At the System screen, select the *Vendor Default* flag. It is not necessary to select any other options or enter any other data. • Click *Save*.

Step	Procedure

Create at least one brand. **About brands:** You need to create at least one brand for an organization to use the Supplier Direct Fulfillment module. Brands. The brand controls the logo that prints on the pack slip and picking pullsheet, and the formats of these documents.
 	
Note: To integrate with Order Management System or CWDirect, you must enter a brand code that matches the ID for the related retail brand (WRDB).
	• Advance to the Brands screen in Modern View.
	• Select the *organization* from the *Organization* drop-down box.
	• Enter the brand code in the *Brand Code* field. The brand code can be 1 to 10 positions long, can include spaces and special characters, and must be unique within the *organization*; however, other organizations can have the same brand code.
	• Enter the name of the brand in the *Brand Name* field. The name can be from 1 to 40 positions long and can include spaces and special characters.
	• Click *NEW*.
	• Complete entry of the *New Brand* screen, including:
	  – Specifying the URL for a logo to print on the pack slip, if graphical, and picking pullsheet. The image file can be in JPG, PNG, or GIF format, and the recommended size is 225 pixels wide by 50 pixels high.
	  – Program names for the pack slip and pullsheet. The default programs are `ob_sdf_packslip_report` and `ob_sdf_pullsheet_report`.
	  – message to print on the pack slip.
	Click *Save* when you are done. See the *New Brand* screen in Modern View for more information.
	
	Note: Oracle staff need to make sure that any external URLs are added to the *allow list*.

Step	Procedure
Create vendors and set preferences. **About vendors:** Vendors fulfill drop ship purchase orders sent to them for fulfillment through Order Broker. When the purchase orders originate in Order Management System or CWDirect, the vendor code in Order Broker needs to match the vendor code in *Work with Vendors* (*WVEN*). Vendors use the Vendor Portal to work with drop ship purchase orders. **Who can set vendor preferences?** Both you and the vendor administrative user, if authorized, can set vendor preferences. See Create vendor users.	Ways to create vendors include: • Use the Vendors screen (select *Locations* > *Vendors*) to create a new vendor, using the code that matches the vendor code in Order Management System or CWDirect. If you use this option, you can set vendor preferences at the same time. See the Vendors screen for more information. • Use the *Download CSV Vendors* option (*ECSV*) in Order Management System or CWDirect to import vendors into Order Broker through the CreateDSVendor message. If you use this option, the vendor name and address match the information from the originating system; however, you still need to use the Vendors screen (select *Locations* > *Vendors*) afterward to set vendor preferences. • Use the CreateDSVendor message to create a vendor when using a system other than Order Management System or CWDirect. If you use this option, you still need to use the Vendors screen (select *Locations* > *Vendors*) afterward to set vendor preferences. • Create a vendor automatically when you send a drop ship purchase order to Order Broker through the CreateDSOrder message. Order Broker creates the vendor using the vendor code, name, and email address indicated in the message. If you use this option, you still need to use the Vendors screen (select *Locations* > *Vendors*) afterward to set vendor preferences and optionally enter the vendor address.
If you create a vendor through any means other than using the New Vendor and *Edit Vendor* screens, you need to complete vendor configuration by setting preferences through these screens.	Vendor preference settings at the New Vendor and *Edit Vendor* screens include: • *pack slip generation options:* Whether to generate a PDF pack slip; whether the pack slip should be graphical or nongraphical; whether to generate a CSV file containing pack slip information; whether to generate a packing pullsheet. • *email notification options:* Whether to generate each type of email notification to the vendor, the email address(es) to use See the Supplier Direct Fulfillment Module Email Notifications Summary. • *data formats:* The language to use for vendor forms (pull sheets) and for system-generated emails to the vendor, as well as date/time and numeric formats for pull sheets, emails to the vendor, and Vendor Portal screens. **Note:** The language used in the Vendor Portal is controlled by the locale appended to the Vendor Portal URL. • *integration settings:* The setup required for an integrated vendor. *invoicing options:* Whether the vendor can submit invoices, and controls on invoice approvals and requirements.

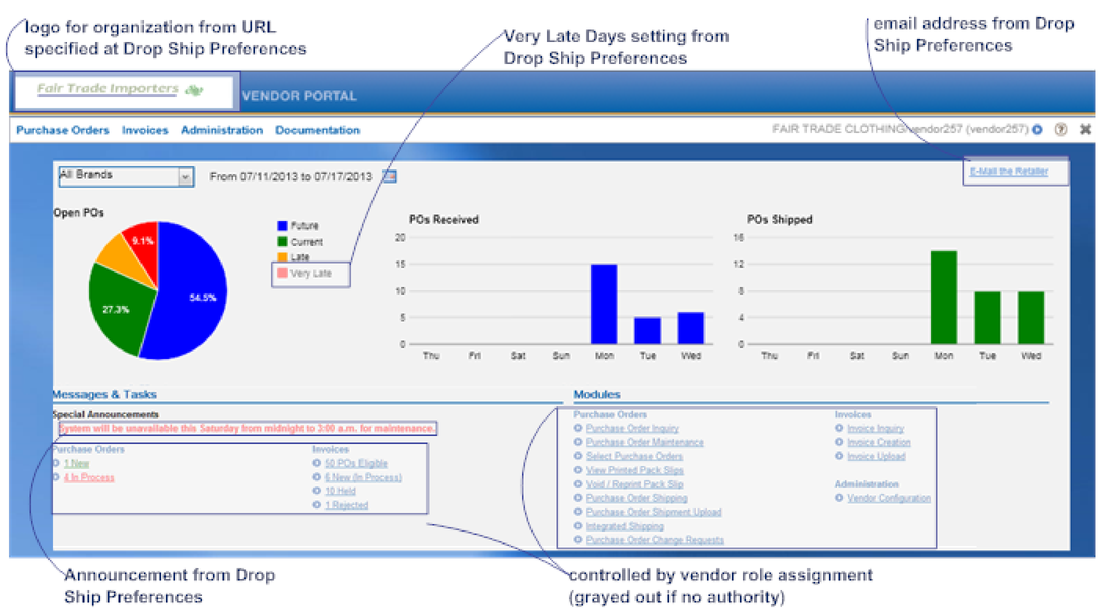
Step	Procedure
Create roles for vendor users. **Note:** This step is not necessary if you have already set up roles to support Supplier Direct Fulfillment for another organization.	• Select *Systems* > *Roles* to advance to the Roles screen. • Click *NEW* to advance to the Role Wizard. • Use the *Role Wizard* to create roles for vendor users who use the Vendor Portal to fulfill drop ship purchase orders.
Create vendor users. **About vendor users:** A vendor user is different type of user profile from the user profiles set up through User Profile Configuration, and has authority only to the Vendor Portal, where the vendor user has access only to the purchase orders related to that vendor.	Set up vendor users in IDCS or OCI IAM and import them through the process described under Import users from IDCS or OCI IAM.

Create carriers.
About carriers and assigning them to vendors: Carriers (ship vias) deliver drop ship purchase orders. When you create a new vendor, the vendor is assigned to all active carriers by default. Similarly, when you create a new, active carrier, you have the option to assign the carrier to all vendors.
	Ways to create carriers and assign them to vendors include:
	• Use the Carriers screen in Modern View to create a new carrier, using the code that matches the ship via code (WVIA) in Order Management System. When you click *NEW* to create a carrier, the *New Carrier* window opens for you to specify whether a tracking number, weight, and rate are required when the vendor confirms shipment using this carrier. When you use this option:
	  – A window prompts you on whether to assign the carrier to all vendors automatically.
	  – You can also use the Carriers tab at the Edit Vendor screen to change the carrier assignments for a vendor.
	• Create a carrier automatically when you send a drop ship purchase order to Order Broker through the CreateDSOrder message. When you use this option, Order Broker creates the carrier using the carrier code specified in the message:
	  – The carrier description, which is displayed to the vendor at the Vendor Portal, is set to `Auto Created 99`, where `99` is the carrier code passed in the CreateDSOrder message.
	  – The carrier is automatically assigned to all existing vendors as an active carrier, with the *Tracking # Required*, *Weight Required*, and *Rate Required* flags all unselected.

Step	Procedure
Set up web service authentication for integrated vendors **About web service authentication:** By setting up and requiring user IDs and passwords for web services, you confirm that Order Broker authenticates the identity of the system submitting web service messages. If authentication is required and Order Broker receives a web service request message without a valid web service user and password, the request is refused with error 3005: `Invalid vendor code`.	Use the *Manage External Application Access* screen to work with and create client IDs for OAuth authentication, and then use the *Edit Web Services* window to assign the Vendor web service to the client ID. See these screens for details. Then use the *Edit Vendor* screen to specify the client ID for the vendor to use. Each integrated vendor requires a unique client ID. **Note:** Each integrated vendor must be notified of the credentials required to authenticate inbound request messages.

Information on the Vendor Portal landing page

Overview: The composition of the Vendor Portal landing page is controlled by your Drop Ship Preference settings and other configuration options. Details about these and other settings are below.



Logo

Logo image URL: You can use the Logo URL field at the *Drop Ship Preferences* screen to specify the location of the logo on Vendor Portal screens. The URL should use https rather than http.

The recommended size is approximately 250x35.

If the URL entered does not point to an existing image file, Vendor Portal screens do not display a logo.

> **Note:**
>
> Oracle staff need to make sure that any external URLs are added to the *allow list*.

Purchase order aging chart

Future/current/late/very late purchase orders: The Vendor Portal landing page displays a pie chart indicating the percentages of open purchase orders based on the aging of their earliest due dates. Order Broker uses the following calculation to determine whether an unshipped, uncanceled purchase order is future, current, late, or very late:

- *Future:* The due date is at least 7 days in the future. For example, if today is 7/17, the due date must be 7/24 or later.
- *Current:* The due date is the current date or later, but no more than 6 days in the future. For example, if today is 7/17, the due date can be 7/17 through 7/23.
- *Late:* The due date is earlier than the current date, but does not fall into the very late range based on the setting of the *Very Late Days* preference specified at the *Drop Ship Preferences* screen. For example, if today is 7/17 and the *Very Late Days* preference is set to 10 days, the due date can be 7/7 through 7/16.
- *Very Late:* The due date is at least the number of days old specified in the *Very Late Days* preference. For example, if today is 7/17 and the *Very Late Days* preference is set to 10 days, the due date can be 7/6 or earlier.

Original or revised due date: The calculation is based on the revised due date, if the vendor has revised it; otherwise, it is based on the original due date.

Line quantity not used in percentage calculation: The calculation does not factor in the purchase order line quantity. For example, there is one current purchase order line with a quantity of one, and another future purchase order line with a quantity of four. The Vendor Portal landing page displays 50% current and 50% future.

Statuses: Purchase order lines in *New Order*, *In Process*, and *Held* status are included in the calculation. *Shipped* and *Canceled* lines are not included.

The determination of dates is based on the vendor’s local time zone, rather than your time zone.

The Vendor Portal must have Internet access to display the charts and graphs.

Additional information for the Vendor Portal landing page

Link to generate an email: The retailer email address on the Vendor Portal landing page is from the *Retailer Email Address* at the Drop Ship Preferences screen. When the vendor clicks the email link, the default mail program opens with the retailer email address as the “to” address, and the subject line is from the *Email Subject* at the Drop Ship Preferences screen.

Announcement: The announcement displayed on the Vendor Portal landing page is from the *Announcement* at the Drop Ship Preferences screen.

Tasks and modules: The vendor user’s authority, based on the assigned roles, controls the tasks and modules that are enabled on the Vendor Portal landing page vs. those that are grayed out. See the *Roles* screen for background.

5
Store Connect Overview

Purpose: Store Connect is a stand-alone Order Broker module whose screens enable store associates to process and fulfill delivery and pickup orders that are assigned to a store location by the Routing Engine.

Setting up data for Store Connect: See *Setting Up Data for the Store Connect Module* for information on the setup required in Order Broker before you can start using the Store Connect module.

Store Connect Basics

Overview: When you create a Store Connect system in your organization, locations assigned to that system are accessible to store associates for processing orders through the Store Connect user interface, provided the locations are flagged to support each type of orders at the **Preferences** screen.

How are Orders Assigned to Store Connect Locations?

The Routing Engine assigns orders to locations in the Store Connect system the same way as it assigns any other orders. The Order Broker preferences and fulfillment rules apply. For example, only locations flagged as *Pickup Available* at the **Preferences** screen are eligible to fulfill pickup orders.

Supported order types: Delivery, pickup, and ship-for-pickup orders are eligible for processing through Store Connect.

See the *Order Broker Routing Engine Overview* for background on order assignment.

> **Note:**
>
> Orders assigned to Store Connect locations should include the customer's first and last name. If an order includes only the customer's company name, store associates cannot search for the order by name at Store Connect screens.

Setting Up Store Associate Users for Store Connect

A store associate is a distinct type of user profile, with access only to Store Connect screens. You assign each associate to one or more store locations. To use Store Connect, the user must be flagged as active and be assigned to at least one store location. See *Setting Up Data for the Store Connect Module* for more information on creating store associates.

Using the Store Connect User Interface

Store location login: The Store Associate can log into a single store location at a time. If the associate is assigned to more than one location, a window opens at login requiring the selection of the store where the associate is currently working.

Open orders only on order processing screens: Only open orders assigned to the current store location are displayed on order processing screens. Also, if any of the items on the order are not currently open, or are assigned to a different store location for fulfillment, these items are not displayed on order processing screens. For example, a pickup order includes an item that has been picked, and another item that has already been picked up by the customer. Only the picked item is displayed. Similarly, if a delivery order includes two order lines, one assigned to location A and the other assigned to location B, only the first item is displayed when the store associate is logged into location A.

All Orders option: Store Connect also provides an All Orders option, so that the associate can research all orders across the enterprise, regardless of status. Screens displaying order detail and history are available. The associate cannot process transactions for orders or lines that are not assigned to the associate's current location.

Different screen sizes supported: The Store Connect user interface adapts to a standard laptop-sized screen, a tablet size, or a smaller, mobile phone size.

Logging into Store Connect

To log into Store Connect, a user must be:

- Created through the *Identity Cloud User Synchronization* job. See *Setting Up Data for the Store Connect Module* for more information.
- Flagged as *Active* at the *Store Associate User Profiles* screen.
- Assigned to at least one store location. See the *Edit Store Associate User Profile* screen.

The processing flows for each order type are described below.

Processing Flow for Delivery Orders

The screens that the associate uses to process delivery orders are described briefly below.

- *New Orders:* The New Orders screen is displayed when the store associate first logs in. This screen displays all orders that have been created in Order Broker, assigned to the associate's current store location, and set to Polled status. The associate can accept one or more or orders at this screen for processing.

  Once the order is accepted, it is no longer displayed at the New Orders screen and is instead displayed at the Ready to Pick screen.
- *Pick Orders:* The Ready to Pick screen displays orders that have been accepted and are ready for picking. The associate can select an order to begin picking. At the Pick Order screen, the associate can indicate the picked quantity by increasing the units, or scanning the item barcode.

  Once a delivery order is fully picked, it is no longer displayed at the Ready to Pick screen and is instead displayed at the Ready to Ship screen.
- *Ship Orders:* The Ready to Ship screen displays both delivery orders and ship-for-pickup orders that have been picked. Provided the order is not under review, the associate can select an order to begin shipping. At the Ship Order screen, the associate needs to complete the Shipping Details based on whether ADSI or the Standard Shipping Service are enabled (normal shipping) or manual shipping are enabled for the store location at the Store Connect Preferences screen:
  – Normal shipping: If ADSI or the Standard Shipping Service are selected as the *Shipping Service* for the location at the Store Connect Preferences screen, the associate needs to:

    * Enter or confirm the package weight. If a weight was specified in the SubmitOrder request, it defaults.
    * Select the box size. If an irregular size is selected, the associate needs to specify the box's length, width, and height.
    * Optionally, select a different carrier.

    > **Note:**
    >
    > The length and weight units of measure defined at the Store Connect Preferences screen are displayed at the Ship Order screen.

  See the *Manage External Services* screen for information on configuring ADSI or the Standard Shipping Service, which can then be selected at the Store Connect Preferences screen.

  – Manual shipping: If manual shipping is selected as the *Shipping Service* for the location at the Store Connect Preferences screen, the associate may need to enter a tracking number based on the carrier settings and, optionally, change the carrier.

  When the associate confirms a shipment, in addition to updating the order and generating a shipment confirmation email to the customer if configured at the Email tab of the *Store Connect Preferences* screen:

  – A barcode shipping label is generated if the shipment uses ADSI or the Standard Shipping Service. Contact your Oracle representative for information on generating a shipping label if using the Standard Shipping Service.

  – The Pack Slip is generated if the *Print Pack Documents* setting at the Store Connect Preferences screen is **Fulfillment**.

  Once the order is fully shipped from the sourcing location, it is no longer displayed at any of the processing screens in Store Connect, although the associate can still display it through the All Orders screen.

  Additional options when shipping an order: In addition to the options described above for other processing steps, at the Ship Order screen the associate can:

  – Change to shipping the order manually, or revert to normal shipping (that is, ADSI or the Standard Shipping Service), if normal shipping was selected by default for the location.

  – Change to a partial shipment. The associate can then decrease the quantity of one or more order lines before confirming shipment.

  – Edit the shipping address. This step may be necessary if ADSI or the Standard Shipping Service returns an error.

Processing Flow for Pickup Orders

Standard processing flow: The screens that the associate uses to process pickup orders are described briefly below. Some of the steps in processing pickup orders are the same as those described above for delivery orders.

- *New Orders:* As described above, the associate can accept one or more or orders at this screen for processing.

- *Pick Orders:* The associate can select an order to begin picking. At the Pick Order screen, the associate can indicate the picked quantity by increasing the units, or scanning the item barcode.

  When the associate completes picking, a pickup order is ready for pickup, provided it is not under review. Also, the pickup ready notification email is sent to the customer, if configured at the Email tab of the *Store Connect Preferences* screen. If items are picked at different times, the email is generated as each item is picked and ready for pickup.

- *Pick Up Orders:* The Ready to Pick Up screen displays pickup orders that have been picked. Provided the order is not under review, the associate can select an order to begin confirming pickup. At the Pick Up Order screen, the associate can complete pickup of the order, or of one or more items on the order.

  Additional options when confirming pickup of an order: In addition to the options described above for other processing steps, at the Pick Up Order screen the associate can:

  – Change the order pickup date, if the customer needs more time.

  – Change to a partial pickup, if the customer is not prepared to pick up the entire order at once. Optionally, the associate can then revert to a full order pickup if needed.

Processing Flow for Ship-for-Pickup Orders

When the sourcing location differs from the pickup location: The screens that the associate uses to process ship-for-pickup orders are described briefly below. Some of the steps in processing ship-for-pickup orders are the same as those described above for delivery or pickup orders.

At the sourcing location:

- *New Orders:* As described above, the associate can accept one or more or orders at this screen for processing.

- *Pick Orders:* The associate can select an order to begin picking. At the Pick Order screen, the associate can indicate the picked quantity by increasing the units, or scanning the item barcode.

  When the associate completes picking for one or more items, the items are ready for shipping to the pickup location.

  Once the order is fully picked, it is no longer displayed at the Ready to Pick screen and is instead displayed at the Ready to Ship screen.

- *Ship Orders:* The Ready to Ship screen displays both delivery orders and ship-for-pickup orders that have been picked. The associate can select a ship-for-pickup order to begin shipping it to the pickup location. See *Processing Flow for Delivery Orders*, above, for more information on shipping options. The status of shipped order lines changes to Intransit and then automatically to Intransit Polled.

  Once the order is fully shipped, it is no longer displayed at any of the processing screens in Store Connect for the sourcing store location, although the associate can still display it through the All Orders screen.

The order is then in transit to the pickup location.

At the pickup location: Once the order is intransit from the sourcing location, it is displayed at the Ready to Receive screen at the pickup location.

- *Receive Orders:* At the pickup location, the Ready to Receive screen displays ship-for-pickup orders that are in transit from the sourcing locations. The associate can receive the order or, if necessary, fully or partially reject the order if, for example, one of the items was damaged in transit.

  Once the order is received, the pickup ready notification to the customer is generated, provided the order is not under review. If items are received at different times, the email is generated as each item is received and ready for pickup.

- *Pick Up Orders:* The Ready to Pick Up screen displays ship-for-pickup orders that have been received. Provided the order is not Under Review, the associate can select an order to begin confirming pickup. At the Pick Up Order screen, the associate can complete pickup of the order.

  Additional options when confirming pickup of an order: In addition to the options described above for other processing steps, at the Pick Up Order screen the associate can:

  – Change the order pickup date, if the customer needs more time.

  – Change to a partial pickup, if the customer is not prepared to pick up the entire order at once. Optionally, the associate can then revert to a full order pickup if needed.

When the sourcing location is the same as the pickup location: In this case, the processing flow is similar to a pickup order, as described above:

- The associate accepts the order.
- The associate picks the order once it is accepted. The status changes automatically from Picked to Received. At this time, provided the order is not under review, the pickup-ready email notification is generated and the order is ready for pickup.

Auto-Cancellation of Pickup or Ship-for-Pickup Orders

If Auto-Cancellation is enabled: If the organization is configured to support auto-cancellation of unclaimed pickup or ship-for-pickup orders, there are related screen and email differences in Store Connect:

- A Pickup By Date is assigned to each line on a pickup or ship-for-pickup order when it is picked, based on the *Auto Cancel Days of Unclaimed Pickup Orders* or the *Auto Cancel Days of Unclaimed Ship For Pickup Orders* defined at the **Fulfillment** tab of the Preferences screen.
- The associate can edit the Pickup By Date if, for example, the customer requests additional time to pick up the order.
- The *Pickup Ready Notification to Customer (Pickup or Ship-for-Pickup Order)* email and the *Pickup Ready Reminder to Customer (Pickup Order)* email, if configured at the Email tab of the *Store Connect Preferences* screen, indicate the Pickup By Date for each item.

Under Review? Even if a pickup order is under review, the Pickup By Date is still assigned.

Example: The organization is configured to set the Pickup By Date 7 days after the order is picked. A pickup order that is under review is picked on 8/1, and the Pickup By Date is set to 8/8. The under review setting changes on 8/3, and the customer is notified that the order is ready for pickup; but the Pickup By Date is still 8/8, which is 7 days from the original date when the order was picked, not from the date when the customer was notified.

If the order is set to under review after initially being ready for pickup, the reminder email is not generated. For example, this might happen if the credit card expired. If the Under Review flag is later cleared, the order is then eligible again for email generation.

For more information: See *Auto-Cancel Unclaimed Orders* for background on requirements, configuration, and process flow for auto-cancellation.

Additional Options and Information During Processing in Store Connect

New Orders screen: If *Print Pick List Pull Sheet* is selected at the Store Connect Preferences screen, Store Connect generates the pull sheet as an aide in picking the order(s). Also, if the *Print Pack Documents* setting at the Store Connect Preferences screen is **Order Accept** or **Order Accept and Pick**, the pack slip is also generated at this time.

Additional order information: Processing screens in Store Connect indicate if the order is:

- Under review: the words **Under Review** in red follow the order number.
- Assigned to an express shipper: indicated by the express shipping icon ( ).
- Not shipped for longer than the *Order Age Hours* defined at the Store Connect Preferences screen: indicated by red text and a triangle icon (12/7/2021).

Additional order options: At various order list and detail screens, the associate has the option to:

- Cancel the order: A cancel reason is required. Note that the pickup location for a ship-for-pickup order cannot cancel the order before receiving it.
- Reject the order: A reject reason is required. An associate can reject an order if, for example, the store is too busy. If a delivery order is rejected, or if a ship-for-pickup order is rejected from the sourcing location, the Routing Engine attempts to reassign ("reshop") the order as it does any other order.

View Order screen: A View Order screen is available by selecting View at the New Orders, Ready to Pick, Ready to Ship, and Ready to Pick Up screens. While at the View Order screen, the associate can perform the next processing step for the order; for example, if the associate selects the View option for an order at the Ready to Ship screen, the Begin Shipping option is available at the View Order screen.

Additional Things to Note for all Order Types

Checking status before update takes place: Before any update to the order takes place, the system confirms that the order is still eligible for the selected update. For example, if the associate is ready to ship an order, but the order has been canceled since it was displayed on the Ship Order screen in Store Connect, the order is not updated to shipped, the Store Connect screen displays an error message, and the associate is returned to the Ready to Ship screen with the order no longer listed.

Split Orders?

If you have the Allow Split Order preference selected, and:

- If a single line on a split order is assigned to a Store Connect location, then only that line is visible in Store Connect.
- If more than one line on an order is assigned to a Store Connect location, then the store associate has the option to process the item separately. For example, an associate can reject a single item on an order and process the remaining item(s).

If you do not have the Allow Split Order preference selected, the associate cannot process items on an order individually. The items appear to be grouped together, and there is no option to process an update against a single line.

Viewing All Orders in Store Connect

The All Orders screen in Store Connect enables the store associate to view all orders, regardless of status or location assignment. From this screen, the associate can select:

- View Order History for an order to advance to the Order History screen, displaying all order history regardless of whether it is related to the current location.
- View for an order to advance to the View Full Order screen. This screen is similar to the View Order screen displayed through the processing steps described above, except that it is available regardless of order status, and displays all order lines, including those not assigned to the current store location.

  From the View Full Order screen, the associate can also process the order based on its current status if the order is assigned to the current store location. For example, if the order has been accepted at the current store location, the Begin Picking option is available.

Notifying Store Connect Locations about New Orders

Email notification: Order Broker generates the *New Order Notification to Store Connect Location* email when any orders are assigned, using the email address specified for the store location, if the *Send New Order Notifications* flag at the **Email** tab of the Store Connect Preferences screen is selected.

Store Connect Email Notifications Summary

A summary of the email notifications to store locations or the customer is provided in the table below.

Notification Type	Generated When:	Setup
Store Location Notifications		**"From" email address:** Set to no-reply@omni.retail.oraclecloud.com, and can also include an alias, if one is specified as the *From Email Alias* at the *Event Logging* screen.
New Order Notification to Store Connect Location)	An order assigned to the store location immediately changes status from *New Order* to *Polled*. See *Notifying Store Connect Locations about New Orders* for background.	**Store location email address:** From the *Emails* specified at the *New Location* or *Edit Location* screen.

Notification Type	Generated When:	Setup
Customer Notifications		**"From" email:** The "from" email address is set to no-reply@omni.retail.oraclecloud.com, and it can also include an alias if one is specified in the *Cust Service From Email Address Alias* field at the *Email tab* at the *Store Connect Preferences* screen. **Logo:** Displaying the logo at the top of emails to customers from the *Logo URL* specified at the *Email tab* at the *Store Connect Preferences* screen is not currently implemented. **Email Notification API?** Optionally, you can have the content for the three email types listed below available for retrieval through the Email Out API, so that you can use an external service to generate email as well as using a customized "from" email address. To use this option: • Select an Email Generation Type of *Standard Email Service* next to the shipment confirmation, pickup ready notification, or pickup reminder email at the **Email** tab of the *Store Connect Preferences* screen. • Use the Email Out API, described in the Operations Guide. **Note:** The Email Out API requires OAuth authentication, set up through the Admin web service. See the *Web Service Authorization* screen.
Shipment Confirmation to Customer (Delivery Order)	The store associate confirms a shipment for a delivery order.	The *Shipment Notification Email Generation Type* at the Store Connect Preferences screen is set to System Generation HTML.

Notification Type	Generated When:	Setup
Pickup Ready Notification to Customer (Pickup or Ship-for-Pickup Order)	The store associate verifies that a pickup order is picked, or that a ship-for-pickup order is received, provided that the order is not under review. When the sourcing location is the same as the pickup location for a ship-for-pickup order, the notification can be generated when the order is picked. The email is generated each time an item on the order is ready for pickup. For example, if an item on a pickup order is picked on Tuesday, and another item is picked on Wednesday, the email is generated each time.	The *Pickup Ready Notification Email Generation Type* at the Store Connect Preferences screen is set to System Generation HTML.
Pickup Ready Reminder to Customer (Pickup or Ship-for-Pickup Order)	The Generate Pickup Ready Reminder Emails job generates these emails, provided the order is not under review.	The *Pickup Ready Reminder Email Generation Type* at the Store Connect Preferences screen is set to System Generation HTML.

New Order Notification to Store Connect Location

- *Subject line:* New Order Notification for Location [Location Code] - [Location Name]

  Sample contents:

  Store Location: [Location Name]

  New orders are ready to be fulfilled.

Setup: See *Store Connect Email Notifications Summary*.

Shipment Confirmation to Customer (Delivery Order)

Setup: See *Store Connect Email Notifications Summary*.

A separate confirmation email is generated for each shipment.

> **Note:**
>
> This email is generated only if the Email Generation Type for the *Shipment Notification Email* at the *Email* tab of the **Store Connect Preferences** screen is set to *System Generated Email*.

- *Subject line:* Your Order # [order number] Has Been Shipped
- *Sample contents:*

Your Order Has Been Shipped

Thank you for your order,

The following item(s) you ordered have been processed and shipped to the address you provided.

Your order number is

Contact Information

508 555 0100

Shipping Information

Attention

Washington, DC 20012 US
508 555 0100

Order Summary

Item	Quantity	Unit Price	Price
Oregano	2	$5.00	$10.00

Tracking Information

Default Carrier:

Email contents:

Sample email contents	Source
Thank you for your order, BROWN CONSULTING, MARY BROWN. Your order number is 13462-001.	Customer first and last name (xom_customer table) **Note:** If there is no customer first and last name, then the company name is used. Order number (xom_order table)
Customer Information BROWN CONSULTING, MARY BROWN 5085550100	Customer company, first name, last name, and day time phone number (xom_customer table)

Sample email contents				Source
Shipping Information BROWN CONSULTING, MARY BROWN MS MARY BROWN, ESQ 1234 SAMPLE AVENUE ADDRESS LINE 2 ADDRESS LINE 3 ADDRESS LINE 4 WORCESTER, MA 01610 USA				Shipping address, including: – company, first name, last name – prefix, first name, last name, suffix – address lines 1 - 4 – city, state/province, postal code, country code – (xom_shipping table; from the first shipping record for the order, if there is more than one)
Order Summary				System product description (system_product table) Quantity, unit price (xom_item table); formatted based on the Data Formats defined for the organization Only items shipped at the same time are listed See *Which currency symbols are supported in emails?* for a list of supported currency symbols
Item	Quantity	Unit Price	Price	
.25 OZ CLOVES	1	$0.95	$0.95	
MARJORAM	1	$9.50	$9.50	
BOX OF MINTS	1	$1.89	$1.89	
Tracking Information UPS: TRACKING_NUMBER				The carrier code and the tracking number, if any, entered manually or assigned through integrated shipping (ship_via and shipping_reference from the xom_status_history table)

Pickup Ready Notification to Customer (Pickup or Ship-for-Pickup Order)

Setup: See *Store Connect Email Notifications Summary*.

Generated when?

- *Pickup order:* The store associate confirms any items on a pickup order are picked, and the order is not under review.
- *Ship-for-pickup order:* If the sourcing location is:
  - Different from the pickup location, the email is generated when the store associate confirms any items on a pickup order are received, and the order is not under review.
  - The same as the pickup location, the email is generated when the store associate confirms any items on a pickup order are picked, and the order is not under review.

If *Auto-Cancel Unclaimed Orders* is enabled, the Pickup By Date is assigned when the order is picked, and is listed in the email.

Note:

- The *Pickup Ready Notification to Customer (Pickup or Ship-for-Pickup Order)* is generated only when a store associate picks a pickup order or receives a ship-for-pickup order through Store Connect. If the sourcing location for a ship-for-pickup order is the same as the pickup location, the email is generated when a store associate picks the order.
- The email is not generated for a pickup or ship-for-pickup order if the order is currently *Under Review*; however, Order Broker creates a record in the email_notification table, and when the *Under Review* flag is cleared, the email is eligible for generation. Regardless of whether the order is under review, if *Auto-Cancel Unclaimed Orders* is enabled, the Pickup By Date is still assigned at the time the order is picked.

Note:

This email is generated only if the Email Generation Type for the *Pickup Ready Notification Email* at the *Email* tab of the **Store Connect Preferences** screen is set to *System Generated Email*.

Contents:

- *Subject line:* Your Order Is Ready For Pickup
- *Sample contents (auto-cancellation not enabled):* The following sample illustrates the email contents for a pickup or ship-for-pickup order if *Auto-Cancel Unclaimed Orders* is not enabled.

Your Order Is Ready For Pickup

Thank you for your order,

The following item(s) you ordered have been processed and are ready for pickup at the location you selected.

Your order number is

Contact Information

5085550100

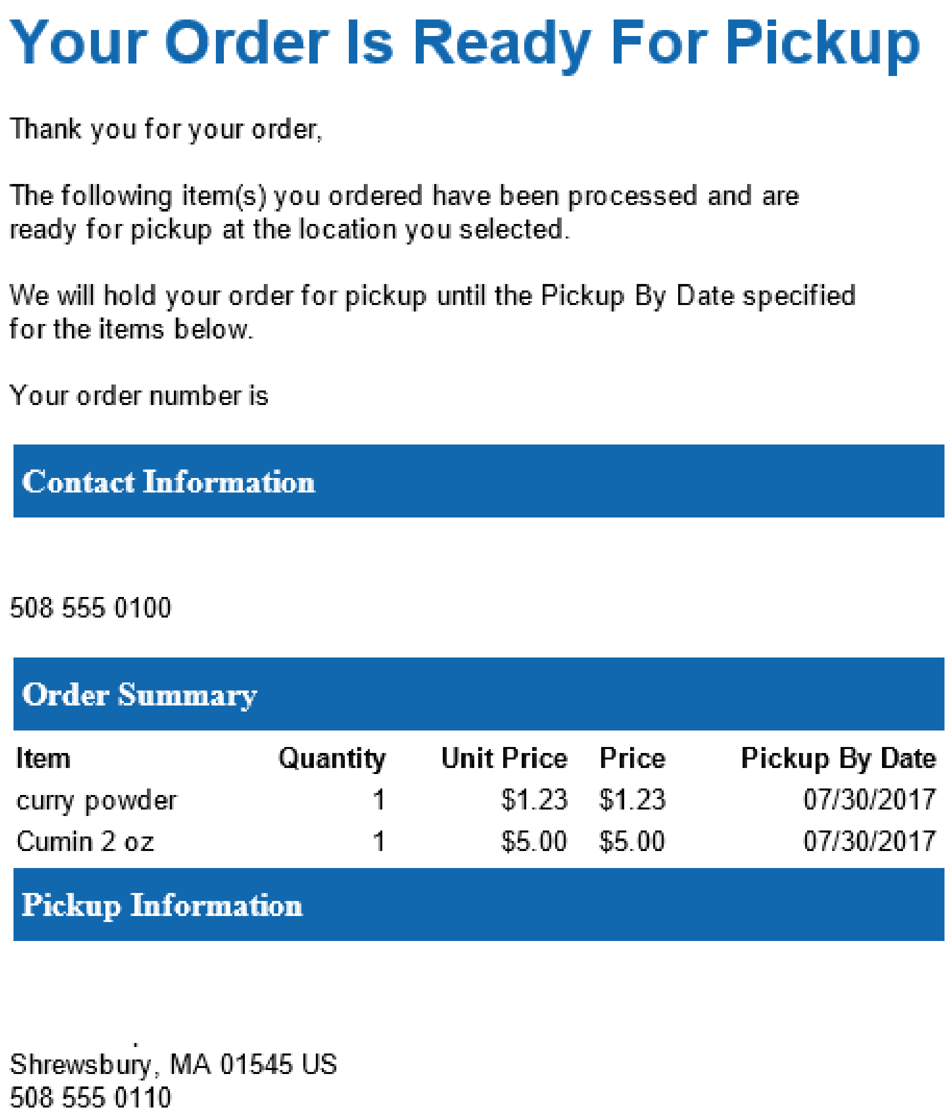
Order Summary

Item	Quantity	Unit Price	Price
Oregano	2	$12.34	$24.68

Pickup Information

Shrewsbury, MA 01545 US
508 555 0110

Sample contents (pickup or ship-for-pickup order with auto-cancellation enabled): The following sample illustrates the email contents for a pickup or ship-for-pickup order if *Auto-Cancel Unclaimed Orders* is enabled.



Your Order Is Ready For Pickup

Thank you for your order,

The following item(s) you ordered have been processed and are ready for pickup at the location you selected.

We will hold your order for pickup until the Pickup By Date specified for the items below.

Your order number is

Contact Information

508 555 0100

Order Summary

Item	Quantity	Unit Price	Price	Pickup By Date
curry powder	1	$1.23	$1.23	07/30/2017
Cumin 2 oz	1	$5.00	$5.00	07/30/2017

Pickup Information

Shrewsbury, MA 01545 US
508 555 0110

Sample email contents	Source
Thank you for your order, MARY BROWN.	Customer first and last name (xom_customer table) If there is no customer first and last name, then the company name is used.
The following item(s) you ordered have been processed and are ready for pickup at the location you selected.	Standard text for a pickup order.
We will hold your order for pickup until the Pickup By Date specified for the items below.	Standard text for a pickup order. Included only if *Auto-Cancel Unclaimed Orders* is enabled.
Your order number is 13542-001.	Order number (xom_order table).

Sample email contents				Source
Customer Information SPROCKET HALL BAKERY, MARY BROWN 5085550100				Customer company, first name, last name, and day time phone number (xom_customer table).
Order Summary				System product, system product description (system_product table). Quantity, unit price (xom_item table); formatted based on the Data Formats defined for the organization. Only orders that are ready for pickup (status is *Picked* or *Received*) are listed See *Which currency symbols are supported in emails?* for a list of supported currency symbols. **Pickup By Date:** The Pickup By Date column is also included for an item on a pickup or ship-for-pickup order if this date was assigned because *Auto-Cancel Unclaimed Orders* is enabled.
Item	**Quantity**	**Unit Price**	**Price**	
Dried marjoram 75 oz.	1	$ 9.50	$19.00	
Whole cloves 1 oz.	2	$10.00	$10.00	
Pickup Information Worcester Store Sample Street - 1234 1234 Sample Street Worcester, MA 01602 US 5085550100				Location name, code, street, apartment/suite, city, state/province, postal code, phone number, country code defined for the location in Order Broker.

Pickup Ready Reminder to Customer (Pickup or Ship-for-Pickup Order)

Setup: See *Store Connect Email Notifications Summary*.

Generated when? When the Pickup By Date is changed for a pickup or ship-for-pickup order (see *If Auto-Cancellation is Enabled*) or the Generate Pickup Ready Reminder Email job runs.

- *Subject line:* Your Order Is Ready For Pickup
- *Sample contents: auto-cancellation not enabled):* The following sample illustrates the email contents for a pickup or ship-for-pickup order if *Auto-Cancel Unclaimed Orders* is not enabled.

Note:

This email is generated only if the Email Generation Type for the *Pickup Ready Notification Email* at the *Email* tab of the **Store Connect Preferences** screen is set to *System Generated Email*.

Your Order Is Ready For Pickup

Thank you for your order,

This is a reminder email. The following item(s) are ready for pickup at the location you selected. If you no longer want the item(s) please call the number below.

Your order number is

Contact Information

5085550100

Order Summary

Item	Quantity	Unit Price	Price
Oregano	2	$12.34	$24.68

Pickup Information

Shrewsbury, MA 01545 US
508 555 0110

Sample contents (pickup order with auto-cancellation enabled): The following sample illustrates the email contents for a pickup or ship-for-pickup order if *Auto-Cancel Unclaimed Orders* is enabled.

Your Order Is Ready For Pickup

Thank you for your order,

This is a reminder email. The following item(s) are ready for pickup at the location you selected. If you no longer want the item(s) please call the number below.

We will hold your order for pickup until the Pickup By Date specified *for the items below.

Your order number is

Contact Information

508 555 0100

Order Summary

Item	Quantity	Unit Price	Price	Pickup By Date
curry powder	1	$1.23	$1.23	08/14/2017

Pickup Information

Shrewsbury, MA 01545 US
508 555 0110

See the *Pickup Ready Notification to Customer (Pickup or Ship-for-Pickup Order)* for information on the data in this email.

Pick List Pull Sheet

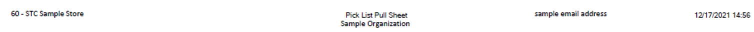
Purpose: The associate in Store Connect can use the pick list pull sheet to pick items needed for orders.

Sample: The following table presents information in the base pick list pull sheet, generated if the *Pick List Pull Sheet Form* Store Connect preference is set to `ob_pullsheet_report`.

Language, date and time formats, and number formats are from the organization.

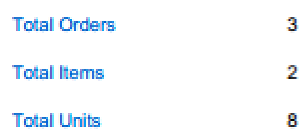
Generated when? The associate selects *Accept & Print* or *Reprint Pack List* for one or more orders, or items on an order.

Field	Description
Page heading	



60 - STC Sample Store	Pick List Pull Sheet Sample Organization	sample email address	12/17/2021 14:56

Field	Description
store location	The associate's current store location.
organization name	The name of the organization.
user ID	The associate's user ID.
generated date and time	The date and time when the associate generated the pick list pull sheet.
Pull sheet summary	



Total Orders	3
Total Items	2
Total Units	8

Field	Description
Total Orders	The total number of separate orders to be picked.
Total Items	The total number of distinct items to be picked.
Total Units	The total number of units, for all items, to be picked.
Item totals	

Item #	Item Description	Pick Quantity	Notes
cloves	Whole cloves 1 oz.	4	
marjoram	Dried marjoram .75 oz.	4	

Field	Description
Item #	The system product code.
Item Description	The description of the item.
Pick Quantity	The total quantity needed to pick for all orders on the pick list pull sheet.
Notes	Space for the associate to enter notes about each item.
Order details	

Order Type	Order #	Name	Item #	Item Description	Quantity Needed	Carrier
Pickup		NAME	cloves	Whole cloves 1 oz.	5	Pick Up
			saffron	Premium saffron 2 grams	1	
Delivery		NAME	cloves	Whole cloves 1 oz.	2	
			marjoram	Dried marjoram .75 oz.	1	

Field	Description
Order Type	Indicates the order type. *Order sequence:* • Pickup orders are listed first, followed by delivery orders, and then ship-for-pickup orders. • Orders requiring express shipment are listed before other delivery or ship-for-pickup orders. • Within each of these groups, orders are in sequence based on order number (lowest to highest).
Order #	The order number assigned by the originating system.
Name	The sold-to customer's name.

Field	Description
Item #	The system product code. Only order lines whose next action is *Pick* (*Accepted* status) can be included.
Item Description	The description of the item.
Quantity Needed	The total quantity of the item needed for this order.
Carrier	The code and description of the carrier to deliver the delivery or ship-for-pickup order. Listed as *Pick Up* for a pickup order.

Packing Slip

Purpose: The associate in Store Connect can use the packing slip to pick items for an order, to include when shipping a delivery order to the customer or a ship-for-pickup order to the pickup location, or to provide the customer with the items on a pickup or ship-for-pickup order.

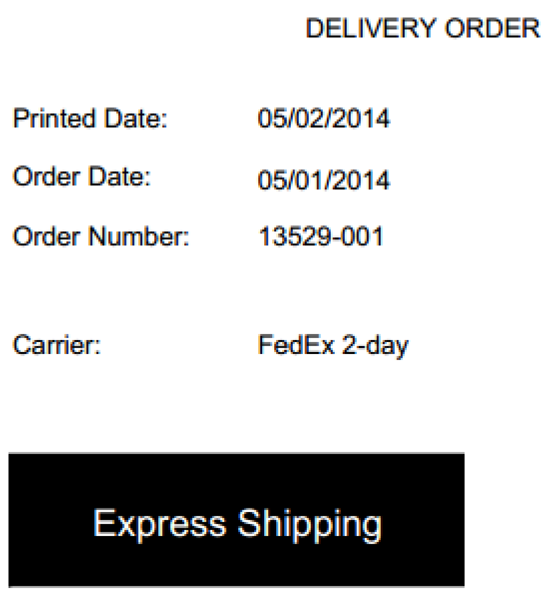
Sample: The following table presents information from the base packing slip, generated if the *Pack Slip Form* Store Connect preference is set to `ob_packslip_stc_report`.

Language, date and time formats, and number formats are from the organization.

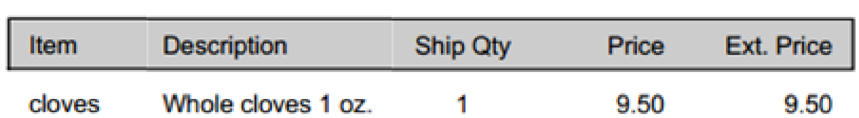
How to generate: See the *Printing Preferences* tab for details on when the pack slip is automatically generated at different processing stages, including order acceptance, picking, and fulfillment, as well as receiving or shipping ship-for-pickup orders.

Field	Description
Header information	
Bar Code	A bar code of the order number, in Code 128 format. Includes an asterisk (*) at the end, indicating to accept the entry.
13456-001*	
SHIP TO	The shipping address for the order is below the logo. Included only for delivery or ship-for-pickup orders. Includes: • first name, middle initial, last name (delivery order) • company (delivery order) or location name (ship-for-pickup order) • first address line, including the apartment or suite, if any • three additional address lines, if any • city, state, zip code, and country For a delivery order, this is the customer's name and shipping address. For a ship-for-pickup order, this is the name and address of the pickup location, as submitted by the originating system. For example, when the order originates from Order Management System, this is the name and address that defaults from the store cross reference, although it can be overridden at order creation in Order Management System. Note that the pickup-ready email notification indicates the location name and address as specified in Order Broker.

Field	Description
SOLD TO	The customer's address is below the *SHIP TO*, if any, on the left. Includes: • first name, middle initial, last name • company name • first address line, including the apartment or suite, if any • three additional address lines, if any • city, state, zip code, and country
Message	The *Delivery Pack Slip Message* or*PickUp Pack Slip Message*, if any, is below the customer address.
Additional order summary information	To the right and below the order bar code.



Order type	Indicates the order type.
Printed Date	The current date when you generated the packing slip.
Order Date	The date when the order was created in Order Broker.
Order Number	The number assigned to the order by the originating system.
Carrier	The carrier specified at the order header. Included only for a delivery order.
Express Shipping	Indicates if the carrier for a delivery or ship-for-pickup order is flagged for express delivery.
Pick Up	Indicated for a pickup order.
Items	



Item	Description	Ship Qty	Price	Ext. Price
cloves	Whole cloves 1 oz.	1	9.50	9.50

Item	The system product code. **Note:** If the item code is very wide, it may be truncated.

Field	Description
Description	**Note:** If the item description is very wide, it may be truncated.
Ship Qty	The quantity of the order line.
Price	No price prints for an order that is flagged as a gift.
Ext. Price	No extended price prints for an order that is flagged as a gift.
Bottom of page	
Return Address	The name and address of the organization, including: • organization name • name of your location that originated the order • first address line, including the suite, if any • three additional address lines, if any • city, state, zip code, and country Included only for a delivery order.

Localization Settings

The following table indicates the source of localization settings for Store Connect screens, reports, and emails. The currency is from the order.

See the *Order Broker Routing Engine Overview* for information on localization settings used Order Broker foundation, and see *Supplier Direct Fulfillment Overview* for information on localization settings used for Supplier Direct Fulfillment.

	Language	Data Formats
screens	locale appended to URL (for example, `?locale=fr`)	store associate user profile; see the *Edit Store Associate User Profile* screen
forms	organization; see the *Organization* screen	organization
emails	organization	organization

Setting Up Data for the Store Connect Module

Purpose: Follow the steps below at Order Broker screens when completing data setup for the Store Connect module as part of Order Broker configuration.

Routing Engine setup required first: Complete the steps below after you have completed *Setting Up Data for the Routing Engine Module*.

Before you start: When setting up data, you typically log into Order Broker as the default admin user. If you are setting up data for an additional organization in Order Broker and are not using the default admin user login, you need full authority to all secured features based on the roles assigned to the user profile. See the *Role Wizard* and the *User Profile Configuration* screen for background.

Note:

To enable Store Connect, you need to select *Use Store Connect* at the Tenant (retailer information) screen.

In this topic:

- *Create the Store Connect Default System.*
- *Create a location type for Store Connect locations.*
- *Create Store Connect locations.*
- *Set up preferences for Store Connect locations.*
- *Set up Store Connect preferences for your organization.*
- *Schedule the Generate Pickup Reminder Ready Emails job.*
- *Specify the logo to display in Store Connect.*
- *Create Store Connect users.*
- *Create reason codes.*
- *Create boxes.*
- *Set up carriers.*
- *Create external shipping services.*
- Shipping Service Conversion *(Confirm and Reconfigure shipping services after upgrading to Order Broker 21.1)*
- *Additional Integrated Shipping Setup and Troubleshooting*

Step	Procedure
Create the Store Connect Default System. Identify the system for Store Connect locations. **Required?** This step is required if your Store Connect system is different from a POS system that you set up through Setting Up Data for the Routing Engine Module. **Important:** You need to use the Store Connect Preferences screen to confirm your settings after setting up the Store Connect system. See Set up Store Connect preferences for your organization.	• Select *Systems* > *Systems* to advance to the Systems screen. • If necessary, select your 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. **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 or OCI IAM. You can use `STC_` (with an underscore rather than a hyphen) instead. • Click *New*. You advance to the System screen. • Select the *Store Connect Default* field. • Use the *Reservation* tab to specify the statuses to include in the reserved quantity for each Store Connect location. Typically, the reserved statuses are *New Order*, *Accepted*, *Picked*, and *Polled*. • Click *Save*. *Inventory Export:* You can also set up and use the Fulfilled Inventory Export at the **Schedule Jobs** screen.
Create a location type for Store Connect locations. **About location types:** Types must be 1 of 3 categories (store, vendor, or warehouse) and further identify a group of locations based on the system to which they belong, such as Store Connect. **Required?** This step is required if your Store Connect location type is different from the POS location type that you set up through Setting Up Data for the Routing Engine Module.	• Select *Location Types* in Modern View to advance to the Location Types screen. • Enter a description of the location type in the *Location Type Description* field. The description cannot exceed 40 positions. • Enter a code for the location type in the *Location Type Code* field. The code cannot exceed 10 positions. • Select the correct category from the *Category* drop-down box. Typically, you would select a *Category* of *Store* to identify the store locations. • Click *New*.

<table>
<tr><th>Step</th><th>Procedure</th></tr>
<tr><td>Create Store Connect locations.
Required? This step is required if your Store Connect locations are different from the POS locations that you set up through Setting Up Data for the Routing Engine Module.</td><td>Select Locations > Locations to advance to the Locations screen.
If necessary, select your organization at the Organization drop-down box.
Select the location type you created earlier from the Type drop-down box.
Enter a Code identifying the location. The code cannot exceed 10 positions.
Enter a name for the location in the Name field. The name, which appears on Store Connect screens and is included in the pickup-ready notification email to the customer, cannot exceed 40 positions.
Select the Store Connect system from the System drop-down box.
Click New to advance to the New Location screen, and complete additional information about the location, such as the address.
Enter the:
Address: Included in the pickup-ready notification email to the customer
Telephone number: Included in the pickup-ready notification email to the customer
Email(s): To receive new order notifications
Click Save.</td></tr>
<tr><td>Set up preferences for Store Connect locations.
This step is required.</td><td>Preferences: After creating Store Connect locations, you need to use the Preferences screen to apply preference settings to the new locations, including the types of orders that they support.</td></tr>
</table>

Step	Procedure
Set up Store Connect preferences for your organization. **About Store Connect preferences:** Use the **Store Connect Preferences** screen to set up information, such as specifying: • order aging thresholds • the link to your logo for display on Store Connect screens, print on packing documents, and include in email notifications • the pick verification method, pick list and pack slip forms, when to print pack documents, pack document messages • whether to use manual shipping, or an external service for shipment confirmation • email notification return address, the types of email to generate, and whether to generate an HTML email or use the email API	• If you are configuring Order Broker shipping for Store Connect for the first time, advance to the *External Services* screen and create each shipping service to be used in Store Connect. See *Shipping Service Conversion*, below, for information on the steps required when you update to Order Broker 21.1 or higher from a previous version where Store Connect was in use. • Select *Organizations and Preferences* and click the Store Connect Preferences icon ( ) for your organization to advance to the *Store Connect Preferences* screen. See the *Store Connect Preferences* screen for field descriptions. You can return to this screen later to reset any existing preferences. Also, see the *Store Connect Overview* for background. **Important:** After setting up the Store Connect system, you need to open the *Store Connect Preferences* screen and click *Save* for your preference settings to take effect. **Important:** – Oracle staff need to make sure that any external URLs are added to the *allow list*. – Set any of the email templates specified at the *Email tab* as needed. Also, if any of the email templates are specified, you need to enter a *Cust Service From Email Address* that has been approved by Oracle.
Schedule the Generate Pickup Reminder Ready Emails job.	Optionally, use the Schedule Jobs screen to schedule the Generate Pickup Reminder Ready Emails job.
Specify the logo to display in Store Connect.	• Select *Systems* > *Tenant* to advance to the *Tenant* screen. • Use the Tenant Logo field to specify the URL for the logo. **Note:** Oracle staff need to make sure that any external URLs are added to the *allow list*.

Step	Procedure
Create Store Connect users. **About Store Connect users:** A Store Connect user has authority only to Store Connect screens.	Use the *Identity Cloud User Synchronization* job to import users from IDCS or OCI IAM. Store Connect users need to have the OBCS_Store_User role assigned in IDCS or OCI IAM. See the *Identity Cloud User Synchronization* for more information. **Assign locations:** • You can assign a store associate to locations, as well as changing the associate's *Active* flag setting, through the Store Associate Location Assignment web service; see the *Operations Guide* on My Oracle Support (2114324.1) for more information. A store associate must be assigned to at least one location in order to use Store Connect. • You can also change these settings at the *Edit Store Associate User Profile*, or use this screen to edit other information about the store associate. *Note:* When you make any changes in IDCS or OCI IAM to an existing store associate's user role, the changes do not take effect until the user logs in. For example, if the associate is currently logged into Store Connect and you remove the OBCS_Store_User role, the associate can continue working in the current, open session.
Create reason codes. **About reason codes:** You can set up reason codes that the associate uses: • reject an order, or a line on an order • cancel an order, or a line on an order	• Advance to the Reason Codes screen in Modern View. • Enter a Code and Description and click *New* to open the *New Reason Code* window. • Complete the entries at the *New Reason Code* window and click *Save*.
Create boxes. **About boxes:** Create one or more boxes to define the dimensions of a box used to ship one or more items using an automated shipping system. If the store associate confirms shipment of items on delivery orders through integration with an automated shipping system, the system requires you to select the box size on the Estimated Weight and Dimensions window. The store associate can select one of the predefined box sizes or manually define the length, width, and height of the box.	• Advance to the Boxes screen in Modern View. • Select Boxes in Modern View. • Enter the box name in the *Name* field. Box names can be 1 to 50 positions in length and must be unique in Order Broker. The name can include special characters and spaces. Include the dimensions of the box in the name so that this information is available when selecting a box in the Store Connect module. The name `Irregular Size`, regardless of case, is reserved by the system to allow a user to manually define the length, width, and height of a box at the Estimated Weight and Dimensions window in Store Connect. • Advance to the *New Box* window in Modern View. • Complete entry of the *New Box* window, including: – the length, width, and height of the box. – whether the box is displayed in Store Connect. – whether the box is the default box size to display in Store Connect. • Click *Save* when you are done. See the *New Box* window in Modern View for more information.

Step	Procedure
Set up carriers.	• Use the Carriers screen in Modern View to review the carriers that associates can use to ship delivery orders, and confirm that each carrier is flagged to Display in Store Connect. Also, you can flag express carriers.
Create external shipping services.	Use the *Manage External Services* screen suite to create and manage shipping external services. You then use the **Shipping** tab of the *Store Connect Preferences* screen to assign shipping services at any level in the Store Connect hierarchy: the Store Connect system, a location type, or an individual store. See below for information on how existing shipping services are converted through the 21.1 update or higher.

Shipping Service Conversion

With the 21.1 update or higher, Order Broker provides a new *External Services* screen suite to create and manage external services. At this time, only shipping services are supported.

Replaces Store Connect Preferences settings: The shipping service information defined at these new screens replaces the configuration options that were formerly available at the **Shipping** tab of the *Store Connect Preferences* screen.

How existing shipping preferences map to new external shipping services: Existing JSON API or ADSI shipping services that were defined at the Store Connect Preferences screen in any organization prior to this release will automatically create external service records. You can then use the Manage External Services screens to review and update the external shipping service records. The settings are mapped as follows:

- *JSON API* settings entered at the Store Connect Preferences screen before this release create *Standard Shipping Service* records in the new screen suite.
- *ADSI* settings entered at the Store Connect Preferences screen before this release create *ADSI Shipping Service* records in the new screen suite.
- The *External Service Type* is always set to **Shipping**.
- The code used when creating each external service will be SHIP plus an incremental number. For example, the first external service record will be SHIP1, and the second will be SHIP2.
- The description assigned when creating each external service will be:
  – For ADSI: **ADSI Shipping for ORG - ORG Description**, where ORG is the organization code and ORG Description is the organization description.
  – For JSON API: **Standard Shipping for ORG - ORG Description**, where ORG is the organization code and ORG Description is the organization description.
- *Active* flag: Selected.
- *Endpoint URL*: From the *Shipper URL* defined at the Store Connect Preferences screen.
- *Shipper Reference*: From the *Shipper Name* defined at the Store Connect Preferences screen.
- *Outbound Message Version*: Set to 1 for a Standard Shipping Service. Not used for ADSI.

- *Authentication Type*: Set to the current Basic or OAuth setting for a Standard Shipping Service. Not used for ADSI.
- *User ID*: Set to the current *User ID* for a Standard Shipping Service that uses Basic authentication. Not used for ADSI.
- *Password*: Set to the current *Password* for a Standard Shipping Service that uses Basic authentication. Not used for ADSI.
- *OAuth URL*: Set to the current *OAUTH URL* for a Standard Shipping Service that uses OAuth. Not used for ADSI.
- *Scope*: Set to the current *Scope* setting for a Standard Shipping Service that uses OAuth. Not used for ADSI.
- *Client ID*: Set to the current *Client ID* for a Standard Shipping Service that uses OAuth. Not used for ADSI.
- *Client Secret*: Set to the current *Client Secret* for a Standard Shipping Service that uses OAuth. Not used for ADSI.
- *Length Unit of Measure*: Set to the current *Length Unit of Measure* for a Standard Shipping Service. For ADSI, defaults to Inches and cannot be changed. Can be Inches (default) or Centimeters for a Standard Shipping Service.
- *Weight Unit of Measure*: Set to the current *Weight Unit of Measure* for a Standard Shipping Service. For ADSI, defaults to Pound and cannot be changed. Can be Pound (default), Gram, or Kilogram for a Standard Shipping Service.

> **Note:**
>
> After advancing to this update, you need to:
>
> - Review the external service records that were automatically created, and correct or delete them as necessary.
> - Select the external service to use at the **Shipping** tab of the Store Connect Preferences screen, and set up the *Shipping Label Return Address*. See below for more information. These are now the only available options at the **Shipping** tab.

Additional Integrated Shipping Setup and Troubleshooting

Additional required setup: The setup required for integrated shipping in Store Connect also includes the following:

- *return address:* The *Shipping Label Return Address* specifies the location whose address is used as the return address on the shipping label, and should include:
  - contact name and company name
  - street address line 1
  - U.S. city, state/province, and postal code
  - phone number of 10 positions, plus any formatting (for example, (508) 555-1111). The store location phone number is used if there is not a day or evening phone number for the order shipping address.

  See the *Edit Location* screen for more information on setting up locations.

- *Carrier codes:* The service codes set up in the integrated shipping system should match the carrier codes set up in Order Broker. If the service codes include leading zeros, then the carrier codes must match; for example, *1* is not a match for `01`.

  See *Carriers* screen in Modern View for more information on setting up carriers.
- *Boxes:* The dimensions of the box used with each shipment is required for all delivery orders using an integrated shipping system. When the store associate confirms shipment of items on delivery orders through integration with an automated shipping system, the system requires you to select the box size on the Estimated Weight and Dimensions window. The store associate can select one of the predefined box sizes or manually define the length, width, and height of the box. See the Boxes screen in Modern View.
- *originating address:* The address of the fulfilling location is used as the originating address, and must include:
  - street address line 1
  - U.S. city, state/province, and postal code
  - phone number of 10 positions, plus any formatting (for example, (508) 555-1111).

  See the *Edit Location* screen for more information on setting up locations.
- *allow list:* If a store associate attempts to ship through integration with ADSI and the ADSI URL is not on the *allow list*, the Store Connect screen opens a pop-up window indicating an unhandled ADSI error. Also, an error message is logged.

Restrictions for integrated shipping:

- *International shipping not supported:* Shipping to addresses outside of the United States is not currently supported through integrated shipping screens in Store Connect.
- *Address line and apartment/suite:* Address line 2 cannot exceed 35 positions; also, the apartment/suite number is appended to address line 2. If the address line 2 exceeds 35 positions, ADSI truncates the line for a Federal Express carrier, and returns an error for a UPS carrier.

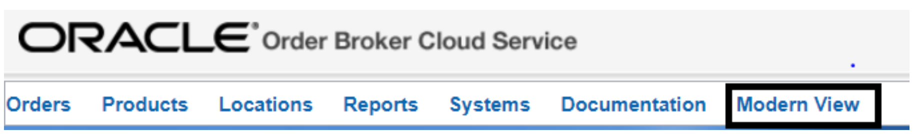
> **Note:**
>
> - *Duplicate service codes:* If you set up multiple service codes in ADSI for the same carrier, the first service code is used on the shipment regardless of whether it was the carrier selected for the order. For example, if you set up both service code 10 and service code 20 in ADSI as UPS Next Day, and the associate confirms the shipment using carrier 20, service code 10 is returned from the integrated shipping system.
> - *Rate shopping:* If the associate confirms a shipment using a rate-shopping service code, and ADSI returns a code that is not currently a valid carrier in Order Broker, Order Broker automatically creates the carrier code.

6
Modern View Overview

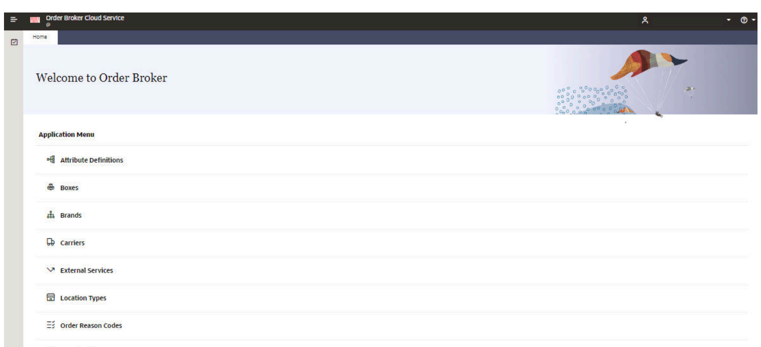
Order Broker Modern View provides select screens for maintaining foundation data . The screens available in Modern View enable you to create, review, update, or delete brands, carriers, boxes, and reason codes. The options available in Modern View differ somewhat from the options you use in Classic View.

Advancing to Modern View

Advancing to Modern View: The **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 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 *What are the supported languages?* in the Frequently Asked Questions for a list of supported languages.

Application data screens available in Modern View: The screens available in Modern View rather than Classic View to work with application data are:

- *Attribute Definitions*
- *Boxes*
- *Brands*
- *Carriers*
- *External Services*
- *Location Types*
- *Order Reason Codes*
- *Organizations*

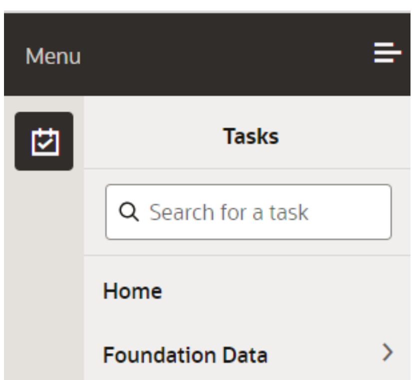
Although these options may be displayed in the Classic View home page and in the drop-down menus, an error message is displayed if you attempt to select any of them.

As in Classic View, authority to each of these options is required through the Rule Wizard. If the user does not have authority to an option, the Modern View home page does not display it.

Additional ways to update application data: In addition to using the screens listed above to work with foundation data, you can also use the application data web services. See Application Data Services in the Operations Guide (MOS ID 2114324.1) for more information.

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:

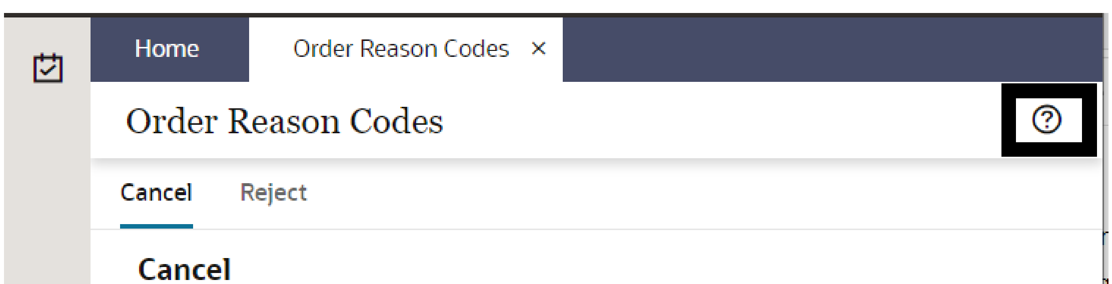
- Add a new record (+)
- Edit a record ( )
- View a record ( )
- Delete a record (×)

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.

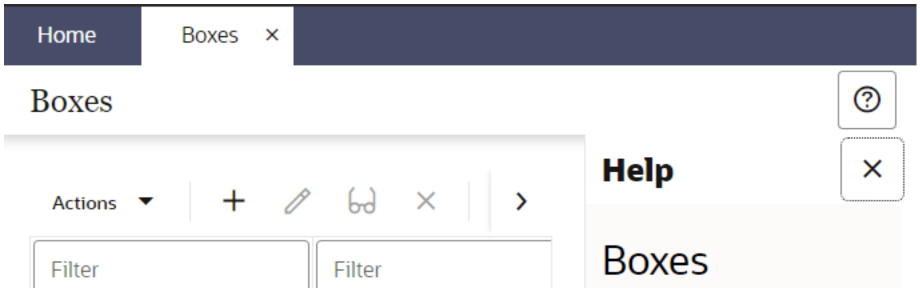
Refresh displayed records: You can use the refresh option ( ) to update the displayed records.

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.



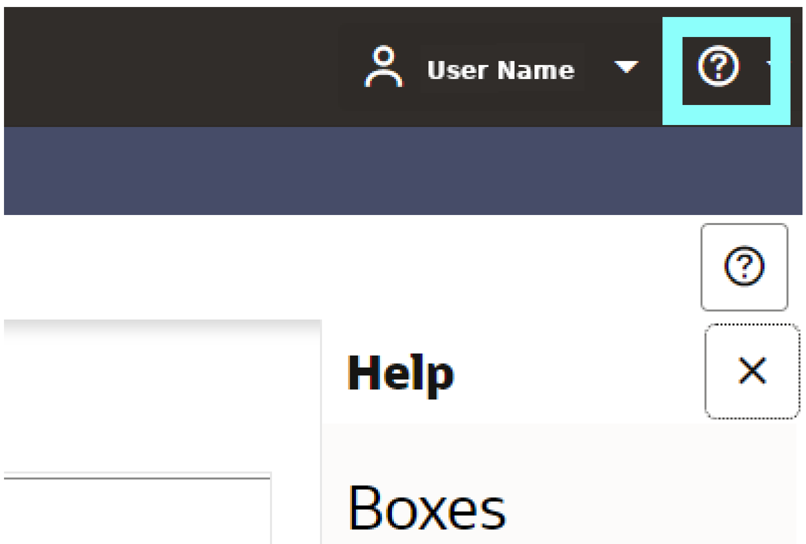
The help topic then opens in a panel to the right of screen.



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.



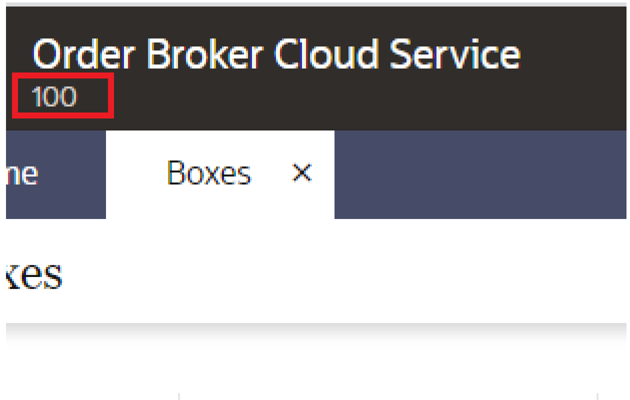
- Clicking the Help icon at the bottom of a screen-specific help topic (

) 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 displayed and updated in Modern View is from the first organization, alphanumerically by organization code, in your environment. For example, if you have an organization code 100 and an organization code 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.

Attribute Definitions

Purpose: Use the **Attribute Definitions** screen to review or work with attributes that you can create and apply to products and locations to control order routing.

Used for the Routing Engine module.

For more information: See *Using Attribute Rules for Delivery and Pickup Orders* and *Using Attribute Rules for Ship-for-Pickup Orders* for background.

Assigning attributes to locations or products: Use the *New Location Attribute* and *New Product Attribute* screens in Classic View to assign attributes.

How to display this screen: Select *Attribute Definitions* from the Modern View home screen. See the *Modern View Overview* for background.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Attribute Definitions* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
create a new attribute definition	1. Select **Add** from the *Actions* menu or select the Add icon (+) to open the **Add Attribute Definition** window. 2. Complete each field. All fields are required. • Enter the description of the attribute in the *Attribute Description* field. The name can include letters, numbers, spaces, and special characters. • Enter the attribute code in the *Attribute Code* field. The attribute code can be 1 to 40 positions long, can include letters, numbers, spaces, and special characters, but all letters are set to upper case. Also, the code must be unique within the *organization*; however, other organizations can have the same code. • Select the *Attribute Type* from the drop-down box, indicating how to use the attribute for filtering orders. • Select the Ship for Pickup Match Type from the drop-down box, indicating whether the attribute applies to the location if it is the Originating, Pickup, or Sourcing location for an order. • Select the *Data Type* indicating the type of data that can be defined through the attribute. Note that if you select a Data Type of list, you can delete list items while creating the attribute definition. 3. Select **OK** or press enter to create the attribute definition, or select **Save and Create Another** to continue creating attribute definitions.

Option	Procedure
search for attribute definitions	The existing attribute definitions for your current organization are displayed. Use any combination of the fields at the top of the screen and tab through the search fields to restrict the search results to matching attribute definitions: • Optionally, enter a full or partial description in the *Attribute Description* field. When you tab through this field, the displayed attribute definitions are limited to those whose descriptions start with your entry, but that don't need to match completely. For example, if your entry is `prod`, the attribute definitions with descriptions starting with Product or Product and Location are displayed. • Optionally, enter a full or partial code in the *Attribute Code* field. When you tab through this field, the displayed attribute definitions are limited to those whose codes start with your entry, but that don't need to match completely. • Optionally, select an *Attribute Type* to display attribute definitions of the same type. • Optionally, select a *Data Type* to display attribute definitions of the same type. • Optionally, select an *Allow Multiple* setting of Yes or No to display attribute definitions that match your selection. **Sort displayed attribute definitions:** You can also sort the displayed attribute definitions by clicking the up arrow (^) or down arrow next to each field title. **Clear filters:** Select **Clear Filters** to remove the criteria entered in the filter fields.
update an attribute definition	1. Highlight a displayed attribute definition. 2. Select **Edit** from the *Actions* menu or click the Edit icon ( ) to open the **Edit Attribute Definition** window. You can edit the *Attribute Description* or *Ship for Pickup Match Type* You can also add or remove list items for a List attribute, and you can change the setting of the Allow Multiple flag for a Text or Number attribute. See *Fields at the Add, Edit, and View Attribute Definitions Windows*, below, for details on fields. 3. Select **OK** or press enter to save your changes.
view an attribute definition	1. Highlight a displayed attribute definition. 2. Select **View** from the *Actions* menu or click the View icon ( ) to open the **View Attribute Definition** window. See *Fields at the Add, Edit, and View Attribute Definitions Windows*, below, for details on fields.
delete an attribute definition	1. Highlight a displayed attribute definition. 2. Select **Delete** from the *Actions* menu or click the Delete icon ( ). 3. Select **OK** or press enter at the **Confirm Deletion** window to delete the attribute definition.

Fields at the Attribute Definitions screen

Field	Description
Attribute Description	The description of the attribute. Can be up to 100 positions. Optionally, enter a full or partial description to display attribute definitions whose descriptions match or start with your entry.
Attribute Code	The Code identifying an attribute you can apply to locations, products, or both. Attribute codes can be 1 to 40 positions in length and must be unique within the *organization*. The code can include special characters, but cannot include any spaces. Any lowercase letters entered are automatically converted to uppercase. Optionally, enter a full or partial code to display attribute definitions whose codes match or start with your entry.
Attribute Type	• *Location:* The attribute can be applied to locations to filter eligible locations when routing orders. For example, if an order originates in a location associated with a particular brand, the eligible sourcing or pickup locations can be restricted to that brand. • *Product:* The attribute can be applied to products. Not used in routing orders. • *Location and Product:* The attribute can be applied to products and locations to filter eligible locations when routing orders. For example, if a product requires engraving, the eligible sourcing and pickup locations can be restricted to those that support engraving. Optionally, select an attribute type to display matching attribute definitions.
Data Type	Indicates the type of data that can be defined through the attribute. Available data types are: • *Boolean:* Indicates whether a condition is true for the product or location; for example, use a Boolean attribute to identify each location that supports oversized items. • *List:* Used to define a list of valid values that can be assigned to a product or location; for example, this might be a list of brands. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions. Optionally, select a data type to display matching attribute definitions.
Allow Multiple	Set to *Yes* if multiple values for the attribute can be assigned to the same product or location; otherwise, set to *No*. Boolean attributes do not support allowing multiples. Also, multiple attribute values cannot be applied to a location when the attribute's Location Use for the location is set to *Originating Location*. Optionally, select Yes or No to display matching attribute definitions.

Fields at the Add, Edit, and View Attribute Definitions Windows

All fields are display-only at the View Attribute Definition window.

Field	Description
Attribute Description	The description of the attribute. Can be up to 100 positions. Truncated if it exceeds the allotted space. Required at the Add or Edit Attribute Definition window.
Attribute Code	The Code identifying an attribute you can apply to locations, products, or both. Attribute codes can be 1 to 40 positions in length and must be unique within the *organization*. The code can include special characters, but cannot include any spaces. Any lowercase letters entered are automatically converted to uppercase. Required at the Add Attribute Definition window; otherwise, display-only.
Last Updated	Indicates the last date and time, if any, when the attribute definition was updated. Note that this field displays a date and time after you select OK at the Edit Attribute Definition window only if you actually made a change to the definition. Displayed only at the Edit and View Attribute Definition windows. Display-only.
In Use	Yes indicates that the attribute is currently assigned to a product and/or a location; otherwise, set to No. If the attribute is in use, it cannot be deleted. Also, if the attribute is a list type and is in use, you cannot delete any list values, although you can add list values. Displayed only at the Edit and View Attribute Definition windows. Display-only.
Attribute Type	• *Location:* The attribute can be applied to locations to filter eligible locations when routing orders. For example, if an order originates in a location associated with a particular brand, the eligible sourcing or pickup locations can be restricted to that brand. • *Product:* The attribute can be applied to products. Not used in routing orders. • *Location and Product:* The attribute can be applied to products and locations to filter eligible locations when routing orders. For example, if a product requires engraving, the eligible sourcing and pickup locations can be restricted to those that support engraving. Required at the Add Attribute Definition window; otherwise, display-only.
Ship For Pickup Match Type	Indicates whether to filter a location based on its role in fulfilling a ship-for-pickup order: • Sourcing: Locations must match the attribute in order to qualify to source the order. For example, if a product requires engraving, the sourcing location must support engraving, based on a matching location attribute with a Location Use of Sourcing. • Pickup: Locations must match the attribute in order to qualify as pickup locations for the order. For example, if the order was submitted under a particular brand, the pickup location must support that brand, based on a matching location attribute with a Location Use of Pickup. • Sourcing and Pickup: Both the sourcing and the pickup location for an order must match the attribute. For example, if a product is flagged as oversized, both the sourcing and the pickup location must support oversized products, based on both a matching location attribute with a Location Use of Sourcing and a matching location attribute with a Location Use of Pickup. **Note:** This setting does not control routing of delivery or pickup orders. Required at the Add or Edit Attribute Definition window.

Field	Description
Data Type	Indicates the type of data that can be defined through the attribute. Available data types are: • *Boolean:* Indicates whether a condition is true for the product or location; for example, use a Boolean attribute to identify each location that supports oversized items. • *List:* Used to define a list of valid values that can be assigned to a product or location; for example, this might be a list of brands. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions. Required at the Add Attribute Definition window; otherwise, display-only.
Value	Use this field to enter each supported value that can be applied for a list attribute. For example, if the attribute is for brand, the values might be the name of each supported brand. Each value can be up to 50 positions. At least one value is required for a list attribute. If this is a Boolean, Number, or Text attribute, this field is not displayed. Click Add Value after entering each new value. The new value is displayed below. Duplicates? If you enter the same value more than once, no error is displayed; however, the duplicate is not added. Values are case-insensitive. For example, if you add a value of ABC123 and then try to enter a value of abc123, it is treated like a duplicate and not added, although no error is displayed. Existing values are listed below this field. Optionally, you can delete a value at the Add or Edit Attribute Definition window by selecting the delete (trash can) icon); however, you cannot delete any values if the attribute definition is currently *In Use*.
Allow Multiple	Selected if multiple values for the attribute can be assigned to the same product or location; otherwise, unselected. Not displayed for a boolean attribute. Note that multiple attribute values cannot be applied to a location when the attribute's Attribute Type for the location is set to *Originating Location*. Optional at the Add or Edit Attribute Definition window.

Boxes

Purpose: Use the **Boxes** screen to define the dimensions of a box used to ship one or more items using an integrated shipping system and whether the box is available in the Supplier Direct Fulfillment module, Store Connect module, or both. The dimensions of the box used with each shipment is required for all delivery orders and purchase orders using an integrated shipping system, as well as for shipment of any ship-for-pickup orders.

> **Note:**
>
> This option is used for the Supplier Direct Fulfillment module and the Store Connect module and is used only if Use Vendor Portal or Use Store Connect is selected at the *Tenant* screen.

Using boxes in the Drop Ship (Supplier Direct Fulfillment) module: If your vendors use the Integrated Shipping screen to confirm shipments, the system requires them to select the box size on the Estimated Weight and Dimensions window. The vendor user can select one of the predefined box sizes or manually define the length, width, and height of the box.

Using boxes in the Store Connect module: When the store associate confirms shipment of items on delivery orders through integration with an automated shipping system, the system requires you to select the box size on the Estimated Weight and Dimensions window. The store associate can select one of the predefined box sizes or manually define the length, width, and height of the box. If only one box size is flagged to display in Store Connect, that box size defaults at the Ship Order screen in Store Connect.

Using an API to work with boxes: You can also use an API to create, update, review, count, or delete boxes. See the Operations Guide (MOS ID 2114324.1) for more information.

How to display this screen: Select *Boxes* from the Modern View home screen. See the *Modern View Overview* for background.

> **Note:**
>
> Only users with *Boxes* authority can display this screen. See the *Role Wizard* for more information.

Option	Procedure
create a new box definition	1. Optionally, select a different *organization*. See the *Modern View Overview* for background. **Note:** You must complete the *Preferences* screen for an organization before you can select it. 2. Select **Add** from the *Actions* menu or select the Add icon (+) to open the **Add Box** window. 3. Complete each of the required fields, and optionally select any of the check boxes. See *Fields at the Add Box, Edit Box, and View Box Windows*, below, for details on fields. 4. Select **OK** or press enter to create the box, or select **Save and Create Another** to continue creating boxes.

Option	Procedure
search for a box definition	The existing boxes defined for your current organization are displayed. Use any combination of the fields at the top of the screen and tab through the fields to restrict the search results to matching boxes: 1. Optionally, enter a full or partial box description in the *Box Description* field. When you tab through this field, the displayed boxes are limited to those that start with your entry, but that don't need to match completely. For example, if your entry is `De`, the box with a description of Default box is displayed. 2. Optionally, select **Yes** or **No** in the *Available in Store Connect* or *Available in Vendor Portal* fields, tabbing through each field. **Sort displayed boxes:** You can also sort the displayed boxes by clicking the up arrow (^) or down arrow next to each field title. **Clear filters:** Select **Clear Filters** to remove the criteria entered in the filter fields.
edit a box definition	1. Highlight a displayed box. 2. Select **Edit** from the *Actions* menu or click the Edit icon ( ) to open the **Edit Box** window. See *Fields at the Add Box, Edit Box, and View Box Windows*, below, for details on fields. 3. Select **OK** or press enter to save your changes.
view a box definition	1. Highlight a displayed box. 2. Select **View** from the *Actions* menu or click the View icon ( ) to open the **View Box** window. See *Fields at the Add Box, Edit Box, and View Box Windows*, below, for details on fields.
delete a box definition	1. Highlight a displayed box. 2. Select **Delete** from the *Actions* menu or click the Delete icon ( ). 3. Select **OK** or press enter at the **Confirm Deletion** window to delete the box.

Fields at the Boxes screen

Field	Description
Description	The description of the box. Up to 50 positions. Alphanumeric.
Available in Store Connect	Indicates if the box is available in the Store Connect module (the Available in Store Connect field is selected for the box). Used only if Use Store Connect is selected at the *Tenant* screen.
Available in Vendor Portal	Indicates if the box is available in the Vendor Portal (the Available in Vendor Portalfield is selected for the box). Used only if Use Vendor Portal is selected at the *Tenant* screen.

Fields at the Add Box, Edit Box, and View Box Windows

All fields are enterable at the **Add Box** and **Edit Box** windows, but are display-only at the **View Box** window.

Field	Description
Box Description	The description of a box. Box names can be 1 to 50 positions in length and must be unique in your organization. The name can include special characters and spaces. Do not use a description of `Irregular Size`, regardless of case, because this option is required to allow a user to manually define the length, width, and height of a box at the Estimated Weight and Dimensions window in Supplier Direct Fulfillment or Store Connect. **Note:** It is helpful to include the dimensions of the box in the name so that this information is available when selecting a box in the Supplier Direct Fulfillment or Store Connect module. Required when creating or editing a box.
Length	The length of the box, typically up to 5 positions with a 2-place decimal, for example: 123.45. The highest length you can enter is 999.99, and the lowest is .01. Required when creating or editing a box.
Width	The width of the box, typically up to 5 positions with a 2-place decimal, for example: 123.45. The highest width you can enter is 999.99, and the lowest is .01. Required when creating or editing a box.
Height	The height of the box, typically up to 5 positions with a 2-place decimal, for example: 123.45. The highest length you can enter is 999.99, and the lowest is .01. Required when creating or editing a box.
Available in Store Connect	Select this flag if the box should be available in the Store Connect module. You should select this flag if you will also select this box definition as the default in Store Connect. Used only if Use Store Connect is selected at the *Tenant* screen.
Default in Store Connect	Select this flag if the box should be the default available for shipping in Store Connect. If another box was previously flagged as the default for Store Connect, the flag for the previous default box is cleared. Used only if Use Store Connect is selected at the *Tenant* screen and if *Available at Store Connect* is selected for the box.
Available in Vendor Portal	Select if the box is available in the Vendor Portal module. You should select this flag if you will also flag this box definition as the default in the Vendor Portal. Used only if Use Vendor Portal is selected at the *Tenant* screen.
Default in Vendor Portal	Select this flag if the box should be the default available for shipping in the Vendor Portal. If another box was previously flagged as the default for the Vendor Portal, the flag for the previous default box is cleared. Used only if Use Vendor Portal is selected at the *Tenant* screen and if *Available in Vendor Portal* is selected for the box.

Brands

Purpose: Use this screen to work with the brands for an organization. Each organization using the Supplier Direct Fulfillment option must have at least one brand.

Used for the Supplier Direct Fulfillment module.

What does brand control?

- The brand logo prints on the pack slip and pullsheet when the vendor generates these PDFs. When the vendor generates pack slips for multiple brands, a separate batch and PDF file is generated for each brand.
- The vendor can use brand as a selection criterion when generating pack slips or confirming shipments.

Created how? You must create each brand within Order Broker, and the brand code must match the ID for the related retail brand from Order Management System. See *Setting Up Data for the Routing Engine Module* for more information.

> **Note:**
>
> This option is used for the Supplier Direct Fulfillment module if Use Vendor Portal is selected at the *Tenant* screen.

Using an API to work with brands: You can also use an API to create, update, review, count, or delete brands. See the Operations Guide (MOS ID 2114324.1) for more information.

How to display this screen: Select *Brands* from the Modern View home screen. See the *Modern View Overview* for background.

> **Note:**
>
> Only users with *Brands* authority can display this screen. See the *Role Wizard* for more information.

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>create a new brand</td><td>
1. Optionally, select a different organization. See the Modern View Overview for background.

Note:
You must complete the Preferences screen for an organization before you can select it.

Note:
To integrate with Order Management System, you must enter a brand code that matches the ID for the related retail brand (WRDB).

2. Select Add from the Actions menu or select the Add icon (+) to open the Add Brand window.
3. Complete each of the required fields. See Fields at the Add Brand, Edit Brand, and View Brand Windows, below, for details on fields.
4. Select OK or press enter to create the brand, or select Save and Create Another to continue creating brands.
</td></tr>
<tr><td>search for a brand</td><td>
The existing brands defined for your current organization are displayed. Use any combination of the fields at the top of the screen and tab through the search fields to restrict the search results to matching brands:
1. Optionally, enter a full or partial brand description. When you tab through this field, the displayed brands are limited to those whose descriptions start with your entry, but that don’t need to match completely. For example, if your entry is <code>Hou</code>, the brand with a description of House Brand is displayed.
2. Optionally, enter a full or partial brand code in the Brand Code field. When you tab through this field, the displayed brands are limited to those whose codes that start with your entry, but that don’t need to match completely. For example, if your entry is <code>Ac</code>, the brand with a code of Accent is displayed.
Sort displayed brands: You can also sort the displayed brands by clicking the up arrow (^) or down arrow next to each field title.
Clear filters: Select Clear Filters to remove the criteria entered in the filter fields.
</td></tr>
<tr><td>edit a brand definition</td><td>
1. Highlight a displayed brand.
2. Select Edit from the Actions menu or click the Edit icon ( ) to open the Edit Brand window. See Fields at the Add Brand, Edit Brand, and View Brand Windows, below, for details on fields.
</td></tr>
</table>

Option	Procedure
view a brand definition	1. Highlight a displayed brand. 2. Select **View** from the *Actions* menu or click the View icon ( ) to open the **View Brand** window. See *Fields at the Add Brand, Edit Brand, and View Brand Windows*, below, for details on fields. 3. Select **OK** or press enter to save your changes.
delete a brand definition	1. Highlight a displayed brand. 2. Select **Delete** from the *Actions* menu or click the Delete icon ( ). 3. Select **OK** or press enter at the **Confirm Deletion** window to delete the brand.

Fields at the Brands screen

Field	Description
Search Fields:	
Brand Description	The name or description of the brand. The name can be from 1 to 128 positions long and can include spaces and special characters. Displayed in the drop-down selection field on screens in the Vendor Portal.
Brand Code	The code identifying the brand. The code can be from 1 to 20 positions long and can include spaces and special characters.
Results fields:	
Brand Description	The name or description of the brand. The name can be from 1 to 128 positions long and can include spaces and special characters. Displayed in the drop-down selection field on screens in the Vendor Portal.
Brand Code	The code identifying the brand. The code can be from 1 to 20 positions long and can include spaces and special characters.

Fields at the Add Brand, Edit Brand, and View Brand Windows

All fields are enterable at the **Add Brand** window, and everything but the Brand Code is enterable at the **Edit Brand** window. All fields are display-only at the **View Brand** window.

Field	Description
Brand Description	The name or description of the brand. The name can be from 1 to 128 positions long and can include spaces and special characters. Displayed in the drop-down selection field on screens in the Vendor Portal.

Field	Description
Brand Code	The code identifying the brand. Must match the ID for the related retail brand from Order Management System (WRDB) and must not already be assigned to a brand in Order Broker. The code can be from 1 to 20 positions long and can include spaces and special characters. Required when creating a brand. You cannot create a new brand with the same exact code as an existing brand within the organization. Note that matching is case-insensitive: you cannot create a brand with a code of ABCD if there is an existing brand with a code of abcd. Otherwise, display-only.
Contact Address	**Note:** The contact address fields are optional and informational only.
Contact Name	Up to 128 positions.
Email(s)	Separate multiple email addresses with a semicolon (;). Up to 2500 positions total.
Telephone	Up to 20 positions.
Extension	Up to 10 positions.
Fax	Up to 20 positions.
Address Lines 1 through 4	Four lines, up to 128 positions each.
Suite	The suite number. Up to 20 positions total.
City	Up to 128 positions.
State/Province	Up to 10 positions.
Country	Up to 3 positions.
Postal Code	The ZIP or postal code for the brand contact. Up to 20 positions.
Return Address	If the *Integration Enabled* flag is selected at the *Drop Ship Preferences* screen, indicating that vendors can confirm shipments through an integration with shipping service such as ADSI, the return address prints on the shipping label; in this case, the *Telephone*, *Address*, *City*,*State/Province*, *Postal Code*, and *Country* are required. If you do not use integrated shipping, the fields on this tab are optional and informational only.
Company	Up to 128 positions.
Contact Name	Up to 128 positions.
Email(s)	Separate multiple email addresses with a semicolon (;). Up to 2500 positions total.
Telephone	Up to 20 positions. Used as the recipient phone number for ADSI (integrated shipping) integration if there is no phone number for the purchase order recipient. Required if the *Integration Enabled* flag is selected at the *Drop Ship Preferences* screen.
Extension	Up to 10 positions.
Fax	Up to 20 positions.

Field	Description
Address Lines 1 through 4	Four lines, up to 128 positions each. Required if the *Integration Enabled* flag is selected at the *Drop Ship Preferences* screen.
Suite	The suite number. Up to 20 positions.
City	Up to 128 positions.
State/Province	Up to 10 positions.
Country	Up to 3 positions.
Postal Code	The ZIP or postal code for the brand return address. Up to 20 positions.
Preferences	
Brand Logo URL	The URL for the brand logo to print on the graphical pack slip and pullsheet. The URL should use https rather than http. The image prints in the upper left corner of each document if you use the default form, or if your unique form supports it. If you leave this field blank, no logo prints on the graphical pack slip or the pullsheet. **File format:** The image file can be in JPG, PNG, or GIF format. **Image dimensions:** The recommended size is 225x50. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Pack Slip Message	The message, if any, to print on all pack slips for the brand. Prints below the sold-to customer name and address in the upper left of the pack slip. This message is also included in the Pack Slip CSV file, if generating the CSV file is specified in the Generate Format setting at the vendor's *Preferences tab*. Your entry can be up to 255 positions, and can include line breaks (carriage returns), but you should preview the pack slip output to make sure that the message fits in the space allotted.

Carriers

Purpose: Use this screen to work with carriers for order shipments. A carrier is required for all sales orders and purchase orders.

Order Management System integration: Carriers in Order Broker that correspond to Order Management System ship vias must have codes identical to the Order Management System ship via codes. The ship via code in Order Management System is a 2-position numeric field.

How to display this screen: Select *Carriers* from the Modern View home screen. See the *Modern View Overview* for background.

> **Note:**
>
> Only users with *Carriers* authority can display this screen. See the *Role Wizard* for more information.

Carrier creation and vendor assignment

Assign to vendors: When you create a new carrier with the *Active* flag selected, or when you select the *Active* flag for an existing carrier, the carrier is assigned as a valid shipper for all vendors in your organization. The carrier is displayed at the *Carriers* tab of the *New Vendor* and *Edit Vendor* screen, and the Assigned flag is selected.

Otherwise, if the carrier is not flagged as active, the carrier is not displayed at the *Carriers* tab of the *New Vendor* and *Edit Vendor* screen.

> **Note:**
>
> Flagging a carrier as inactive does not prevent you from assigning the carrier to a purchase order through the CreateDSOrder message, and will not prevent the vendor from generating a pack slip using an inactive carrier; however, the vendor will not be able to confirm shipment with an inactive carrier when using the **Purchase Order Shipping** screen. The vendor can confirm a shipment using an inactive carrier through the shipment upload.

You can use the *Carriers tab* at the *Edit Vendor* screen to change the carrier assignments for a vendor. Also, if you change the carrier's *Active* setting:

- if the carrier was previously inactive and you activate the vendor, the carrier becomes eligible to ship packages for vendors it is assigned to.
- if the carrier was previously active and you change the carrier to inactive, the carrier is no longer eligible to ship packages for vendors it is assigned to.

Creating a carrier through rate shopping with ADSI: If your vendors use the Integrated Shipping screen to confirm shipments, and the shipment specifies a rate shopping service code (carrier code), it is possible that ADSI might return a service code that is not currently a valid carrier in Order Broker. In this situation, Order Broker automatically creates the carrier code, but does not assign the new carrier to the vendor. See *Integrated Shipping Setup, Troubleshooting, and Mapping: Supplier Direct Fulfillment* for background.

Carrier creation and sales order assignment

Creating a carrier through the SubmitOrder message: If the carrier specified in the *submit order message* for a delivery order does not already exist, it is assigned to the order and created automatically using the `ship_via` as the carrier *Code* and the `ship_via_description` as the carrier *Description*. The new carrier is flagged as *Active*, but no other settings are selected. The new carrier is not automatically assigned to any existing vendors, but is eligible to be automatically assigned when you create new vendors.

Default carriers:

- *Delivery orders:* A *Default Carrier* is required at the *Preferences* screen for your organization. This is the carrier that Order Broker assigns to orders that do not have a ship via specified in the *submit order message*.
- *Pickup orders:* The default *PICKUP* carrier is created automatically for your organization, and assigned to all pickup orders, when a SubmitOrder request is received. The default *PICKUP* carrier:
  - has a *Code* of *PICKUP*

- has a default *Description* of *In Store Pick Up*, but you can change it
- is automatically assigned to all pickup orders

You cannot delete these carriers.

Order Broker does not assign these default carriers to vendors.

If the carrier in the submit order message exists but is not currently flagged as active, Order Broker changes the setting back to active.

Using a carrier for a delivery order in Store Connect: The carrier on a delivery order is displayed on Store Connect screens and prints on the pick list pull sheet and packing slip; however, the store associate cannot confirm a shipment using a carrier unless both the *Display in Store Connect* and *Active* flags are currently selected.

Specifying a carrier to prevent splitting an order: If the *Do Not Split Order For Carrier* field at the **Preferences** screen specifies a carrier, the Routing Engine does not attempt to place a delivery order or line by splitting it across locations. See that setting for more information.

Using an API to work with carriers: You can also use an API to create, update, review, count, or delete carriers. See the Operations Guide (MOS ID 2114324.1) for more information.

Option	Procedure
create a new carrier	1. Optionally, select a different *organization*. See the *Modern View Overview* for background. **Note:** You must complete the *Preferences* screen for an organization before you can select it. 2. Select **Add** from the *Actions* menu or select the Add icon (+) to open the **Add Carrier** window. 3. Complete each of the required fields. See *Fields at the Add Carrier, Edit Carrier, and View Carrier Windows*, below, for details on fields. 4. Select **OK** or press enter to create the carrier, or select **Save and Create Another** to continue creating carriers.

Option	Procedure
search for a carrier	The existing carriers defined for your current organization are displayed below the selected type. Use any combination of the fields at the top of the screen and tab through the search fields to restrict the search results to matching carriers: • Optionally, enter a full or partial carrier description. When you tab through this field, the displayed carriers are limited to those whose descriptions start with your entry, but that don't need to match completely. For example, if your entry is `Ex`, the carriers with descriptions of Express Overnight or Express Two-Day or displayed. • Optionally, enter a full or partial carrier code in the *Carrier Code* field. When you tab through this field, the displayed carriers are limited to those whose codes start with your entry, but that don't need to match completely. For example, if your entry is `2`, the carrier codes starting with 2 are displayed. • Optionally, select **Yes** or **No** in the *Express*, *Available in Store Connect*, or *Active* fields to display matching carriers. **Sort displayed carriers:** You can also sort the displayed reason codes by clicking the up arrow (^) or down arrow next to each field title. **Clear filters:** Select **Clear Filters** to remove the criteria entered in the filter fields.
edit a carrier definition	1. Highlight a displayed carrier. 2. Select **Edit** from the *Actions* menu or click the Edit icon ( ) to open the **Edit Carrier** window. You can edit the *Carrier Description* or change any of the flag settings for the carrier. See *Fields at the Add Carrier, Edit Carrier, and View Carrier Windows*, below, for details on fields. Note that changes you made to an existing carrier do not update the orders where the carrier was used. For example, if you change the description or the Express flag for an existing carrier, this information is not reflected on the Order Status report for an existing order.
view a carrier definition	1. Highlight a displayed carrier. 2. Select **View** from the *Actions* menu or click the View icon ( ) to open the **View Carrier** window. See *Fields at the Add Carrier, Edit Carrier, and View Carrier Windows*, below, for details on fields. 3. Select **OK** or press enter to save your changes.

Option	Procedure
delete a carrier definition	1. Highlight a displayed carrier. 2. Select **Delete** from the *Actions* menu or click the Delete icon ( ). 3. Select **OK** or press enter at the **Confirm Deletion** window to delete the carrier. **Important:** To avoid a potential Store Connect processing error, you should not delete a carrier. If you accidentally delete a carrier, you should recreate it using the exact same code. You cannot delete the *Default Carrier* defined at the Preferences screen, or the PICKUP carrier that is automatically assigned to pickup orders.

Fields at the Carriers screen

Field	Description
Carrier Description	The description of the carrier. A description such as *Auto Created 15*, where *15* is the carrier code, indicates that the carrier was created automatically through the CreateDSOrder or Submit Order message. Case-insensitive for searching; for example, an entry of `e` matches a description of `Express Delivery`.
Carrier Code	The code identifying a carrier.
Express	Indicates if this is an express shipper. Express shippers are indicated in Store Connect with an icon: Used for Store Connect. Not used in Supplier Direct Fulfillment.
Available in Store Connect	If both this flag and the *Active* flag are selected, the carrier is eligible to ship orders in Store Connect. Not used in Supplier Direct Fulfillment.

Field	Description
Active	Indicates whether: • the carrier is visible at the *Carrier* tab of the *New Vendor* or *Edit Vendor* screens • the vendor can confirm shipment of purchase orders using this carrier in the Vendor Portal • the store associate can confirm shipment of a delivery order using this carrier in Store Connect if the *Display in Store Connect* flag is also selected • *Purchase orders:* Flagging a carrier as inactive does not prevent you from assigning the carrier to a purchase order through the CreateDSOrder message, and will not prevent the vendor from generating a pack slip using an inactive vendor; however, the vendor will not be able to confirm shipment with an inactive vendor when using the **Purchase Order Shipping** screen. The vendor can confirm a shipment using an inactive carrier through the shipment upload. • *Reset to Active when used on a new order:* When Order Broker creates a new sales order using an existing carrier that is not currently flagged as active, it resets this flag to active for the carrier. • *Store Connect:* Flagging a carrier as inactive does not prevent the carrier from being displayed in Store Connect, but the associate cannot confirm shipment of a delivery order using the carrier. Both the *Active* and *Display in Store Connect* flags must currently be selected for the carrier to be eligible for shipment through Store Connect.

Fields at the Add Carrier, Edit Carrier, and View Carrier Windows

All fields are enterable at the **Add Carrier** window. All fields except the *Carrier Code* are enterable at the **Edit Carrier** window. All fields are display-only at the **View Carrier** window.

Field	Description
Carrier Description	The description of the carrier. Your entry can be up to 128 positions.
Carrier Code	The code identifying a carrier. Your entry can be up to 20 positions. Must not be the same as an existing carrier code in the current organization. Required when creating a new code; otherwise, display-only.
Express	Indicates if this is an express shipper. Express shippers are indicated in Store Connect with an icon:  Used for Store Connect. Not used in Supplier Direct Fulfillment.
Weight Required	Select this flag if the vendor must provide the shipping weight for each manual shipment using this carrier; otherwise, the shipping weight is optional in manual shipment. This flag does not affect Store Connect.
Available in Store Connect	If both this flag and the *Active* flag are selected, the carrier is eligible to ship orders in Store Connect. Not used in Supplier Direct Fulfillment.

Field	Description
Rate Required	Select this flag if the vendor must provide the shipping rate for each manual shipment using this carrier; otherwise, the shipping rate is optional. This flag does not affect Store Connect.
Tracking Number Required	Select this flag if: • the vendor must provide a tracking number for each manual shipment using this carrier; otherwise, the tracking number is optional. • the store associate in Store Connect must provide a tracking number for each shipment using this carrier through the manual shipment process; otherwise, the tracking number is optional in manual shipment.
Active	Indicates whether: • the carrier is visible at the *Carrier* tab of the New Vendor or Edit Vendor screens • the vendor can confirm shipment of purchase orders using this carrier in the Vendor Portal • the store associate can confirm shipment of a delivery order using this carrier in Store Connect if the *Display in Store Connect* flag is also selected • *Purchase orders:* Flagging a carrier as inactive does not prevent you from assigning the carrier to a purchase order through the CreateDSOrder message, and will not prevent the vendor from generating a pack slip using an inactive vendor; however, the vendor will not be able to confirm shipment with an inactive vendor when using the **Purchase Order Shipping** screen. The vendor can confirm a shipment using an inactive carrier through the shipment upload. • *Reset to Active when used on a new order:* When Order Broker creates a new sales order using an existing carrier that is not currently flagged as active, it resets this flag to active for the carrier. • *Store Connect:* Flagging a carrier as inactive does not prevent the carrier from being displayed in Store Connect, but the associate cannot confirm shipment of a delivery order using the carrier. Both the *Active* and *Display in Store Connect* flags must currently be selected for the carrier to be eligible for shipment through Store Connect. • *Default PICKUP carrier:* You cannot flag the default PICKUP carrier for Store Connect as inactive. • *SHIP2STORE carrier:* If this carrier was created in a prior release of Order Broker, you can flag it as inactive.

External Services

Purpose: Use the External Services screen to review and work with attributes for external services used for integration. At this time, only shipping services, for use in Store Connect, are supported.

Assigning external services: External services are available for assignment at the **Shipping** tab of the Store Connect Preferences screen for any organization.

How to display this screen: Select *External Services* from the Modern View home screen. See the *Modern View Overview* for background.

> **Note:**
>
> Only users with *Manage External Services* authority can display this screen. See the *Role Wizard* for more information.

When upgrading from Order Broker 21.0 or earlier: See *Shipping Service Conversion* for information on how shipping services are converted when you upgrade from Order Broker 21.0 or earlier, and the required steps to verify and select shipping services.

Using an API to work with external services: You can also use an API to create, update, review, count, or delete external services. See the Operations Guide (MOS ID 2114324.1) for more information.

Options at this screen

Option	Procedure
create a new external service	1. Select **Add** from the *Actions* menu or select the Add icon (+) to open the **Add External Service** window. 2. Complete each of the required fields. See *Fields at the Add External Service, Edit External Service, and View External Service Windows*, below, for details on fields. 3. Select **OK** or press enter to create the external service, or select **Save and Create Another** to continue creating external services.

Option	Procedure
search for an external service	The existing external services defined for your current organization are displayed. Use any combination of the fields at the top of the screen and tab through the search fields to restrict the search results to matching external services: • Optionally, enter a full or partial description in the *External Service Description* field. When you tab through this field, the displayed external services are limited to those whose descriptions start with your entry, but that don't need to match completely. For example, if your entry is `St`, the external services with descriptions starting with Standard Shipping are displayed. • Optionally, enter a full or partial code in the *External Service Code* field. When you tab through this field, the displayed external services are limited to those whose codes start with your entry, but that don't need to match completely. For example, if your entry is `AD`, the external service codes starting with ADSI are displayed. • Optionally, select **Yes** or **No** in the *Active* fields to display active or inactive external services. It is not necessary to select an External Service Type of Shipping, since this is the only valid External Service Type setting. **Sort displayed external services:** You can also sort the displayed external services by clicking the up arrow (^) or down arrow next to each field title. **Clear filters:** Select **Clear Filters** to remove the criteria entered in the filter fields.
update an existing external service	1. Highlight a displayed external service. 2. Select **Edit** from the *Actions* menu or click the Edit icon ( ) to open the **Edit External Service** window. • You can edit the *External Service Description*, or change the Active flag. • If the shipping service is ADSI, the only additional fields you can change are the Endpoint URL and the Shipper Reference. • If the shipping service is Standard Shipping Service, you can change all the remaining fields in the window. See *Fields at the Add External Service, Edit External Service, and View External Service Windows*, below, for details on fields. 3. Select **OK** or press enter to save your changes.
view an external service	1. Highlight a displayed external service. 2. Select **View** from the *Actions* menu or click the View icon ( ) to open the **View External Service** window. See *Fields at the Add External Service, Edit External Service, and View External Service Windows*, below, for details on fields.

Option	Procedure
delete an external service	1. Highlight a displayed external service. 2. Select **Delete** from the *Actions* menu or click the Delete icon (✕). 3. Select **OK** or press enter at the **Confirm Deletion** window to delete the external service. **Note:** You cannot delete an external service that is currently selected as the Shipping Service for an organization at the Store Connect Preferences screen.

Fields at the External Services screen

Field	Description
External Service Description	The description of the external service. Optionally, enter a full or partial description to search for an external service to display external services whose descriptions start with or match your entry.
External Service Code	The code that identifies an external service. Optionally, enter a full or partial code to display external services whose codes start with or match your entry.
Active	Indicates if the external service is flagged as active. Optionally, use this flag to filter search results based on whether the external service is active. Select: • *Yes* for external services that are active. • *No* for external services that are not active.
External Service Type	Always set to **Shipping**. Although the External Service Type is available in the search fields, you cannot use it for searching, since Shipping is the only available setting.

Fields at the Add External Service, Edit External Service, and View External Service Windows

All fields are display-only at the View External Service window.

Field	Description
External Service Description	The description of the external service. Up to 256 positions. Required at the Add or Edit External Service window.
External Service Code	The code identifying the external service. Your entry is converted to uppercase. Up to 20 positions. Required at the Add External Service window; otherwise, display-only.
Active	Indicates if the shipping service is currently active. **Note:** • Inactive shipping services are indicated as (Inactive) in the Shipping Service drop-down at the Store Connect Preferences screen. • If an inactive shipping service assignment applies to a store location, only manual shipping is available at the location.
External Service Type	At this time, only an external service type of **Shipping** is available. Required when creating an external service; otherwise, display-only.

Field	Description
Shipping Service	At the Add External Service window, this field is available and required when you select the external service type of **Shipping**; otherwise, display-only. When creating an external service, select a shipping type: • ADSI • Standard Shipping Service: Uses the Generic Ship Order API. See the Operations Guide on My Oracle Support (2114324.1) for details.
Outbound Message Version	Displayed only when the selected Shipping Service is Standard Shipping Service. Currently, the only available version for the Standard Shipping Service is 1.0. Required.
Shipping Service Configuration	The remaining fields at the window vary depending on the selected shipping service and the selected authentication type.
Endpoint URL	Enter the URL to use for the integrated shipping system when the store associate confirms shipments through integrated shipping. Up to 256 positions. Included for both ADSI and Standard Shipping Service. Required. **Note:** Oracle staff need to make sure that this URL is added to the allow list.
Shipper Reference	Reference value for the shipper to identify the calling system. Included for both ADSI and Standard Shipping Service. Up to 256 positions. Optional.
Authentication Type	Included only for the Standard Shipping Service. Possible authentication types are Basic and OAuth (default). The selected authentication type controls the additional fields described below. Required.
OAuth URL	The URL to use for authentication request messages for the Standard Shipping Service. Up to 256 positions. Included only for the Standard Shipping Service and when the Authentication Type is set to OAuth; in this case, required.
Scope	The scope to specify for authentication request messages for the Standard Shipping Service. Up to 256 positions. Included only for the Standard Shipping Service and when the Authentication Type is set to OAuth. Optional.
Client ID	The client ID to use for authentication request messages for the Standard Shipping Service. Up to 256 positions. Included only for the Standard Shipping Service and when the Authentication Type is set to OAuth; in this case, required.
Client Secret	The client secret to use for authentication request messages for the Standard Shipping Service. Up to 256 positions. Included only for the Standard Shipping Service and when the Authentication Type is set to OAuth; in this case, required.
User ID	The user ID to authenticate request messages for the Standard Shipping Service. Up to 256 positions. Included only for the Standard Shipping Service and when the Authentication Type is set to Basic; in this case, required.
Password	The password to authenticate request messages for the Standard Shipping Service. Up to 256 positions. Included only for the Standard Shipping Service and when the Authentication Type is set to Basic; in this case, required.
Packaging Dimensions	Included for both ADSI and the Standard Shipping Service.

Field	Description
Length Unit of Measure	Defines the length unit of measure to display in the Length, Width, and Height fields at the **Ship Order** screen in Store Connect. Possible settings are Inch and Centimeter for a Standard Shipping Service. Defaults to Inches. Cannot be changed for ADSI.
Weight Unit of Measure	Defines the weight unit of measure to display in the Package Weight field at the **Ship Order** screen in Store Connect. Possible settings are Gram, Kilogram, and Pound (default) for a Standard Shipping Service. Defaults to Pounds. Cannot be changed for ADSI.

Organizations

Purpose: Use the **Organization** screen to work with the default organization, or to create or work with additional organizations.

Setting preferences for an organization: Use the *Organizations and Preferences* screen in Classic View to advance to the screens you use to work with Order Broker, Drop Ship, or Store Connect preferences.

How to display this screen: Select *Organizations* from the Modern View home screen. See the *Modern View Overview* for background.

> **Note:**
>
> Only users with *Organization and Preferences* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
create a new organization	1. Select **Add** from the *Actions* menu or select the Add icon (+) to open the **Add Organization** window. 2. Enter the description of the organization in the Organization Description field. The description can be from 1 to 35 positions long, and can include spaces and special characters. 3. Enter the organization code in the Organization Code field. The organization code can be 1 to 10 positions long, can include spaces and special characters, and must be unique within Order Broker. 4. Complete any additional optional fields. See *Fields at the Add Organization, Edit Organization, and View Organization Windows*, below. 5. Select **OK** or press enter to create the organization, or select **Save and Create Another** to continue creating organizations. **Note:** If you want to enter or change any data for a new organization immediately after you create it, you may need to advance to Classic View, and then return to Modern View and select the Organizations option again in order to update the new organization.

Option	Procedure
search for an organization	The existing organizations are displayed. Use any combination of the fields at the top of the screen and tab through the search fields to restrict the search results to matching organizations: • Optionally, enter a full or partial organization description in the *Organization Description* field. When you tab through this field, the displayed organizations are limited to those whose descriptions start with your entry, but that don’t need to match completely. For example, if your entry is `1`, the organizations with descriptions starting with 123 or 157 are displayed. • Optionally, enter a full or partial code in the *Organization Code* field. When you tab through this field, the displayed organizations are limited to those whose codes start with your entry, but that don’t need to match completely. **Sort displayed organizations:** You can also sort the displayed organizations by clicking the up arrow (^) or down arrow next to each field title. **Clear filters:** Select **Clear Filters** to remove the criteria entered in the filter fields.
update an organization	1. Highlight a displayed organization. 2. Select **Edit** from the *Actions* menu or click the Edit icon ( ) to open the **Edit Organization** window. You can edit any fields except the *Organization Code*. See *Fields at the Add Organization, Edit Organization, and View Organization Windows*, below, for details on fields. 3. Select **OK** or press enter to save your changes.
view an organization	1. Highlight a displayed organization. 2. Select **View** from the *Actions* menu or click the View icon ( ) to open the **View Organization** window. See *Fields at the Add Organization, Edit Organization, and View Organization Windows*, below, for details on fields.
delete an organization	1. Highlight a displayed organization. 2. Select **Delete** from the *Actions* menu or click the Delete icon ( ). 3. Select **OK** or press enter at the **Confirm Deletion** window to delete the organization. **Note:** You cannot delete an organization that has an existing system defined. Also, you can not delete the only existing organization in Order Broker.

Fields at the Organizations screen

Field	Description
Organization Description	The description can be from 1 to 35 positions long, and can include spaces and special characters. Optionally, enter a full or partial organization description to display organizations that match or begin with your entry.

Field	Description
Organization Code	The code identifying the *organization*. Optionally, enter a full or partial organization code to display organizations that match or begin with your entry.

Fields at the Add Organization, Edit Organization, and View Organization Windows

Field	Description
Organization Description	The description can be from 1 to 35 positions long, and can include spaces and special characters. Required at the Add Organization and Edit Organization screen.
Organization Code	The code identifying the *organization*. Up to 10 positions. Required at the Add Organization screen; otherwise, display-only.
Locale	The language to use for the system-generated emails, reports, and forms listed below. The locale also defines the data formats used on reports and emails. **Order Broker emails:** The organization locale controls the format of information in the following system-generated emails: • *Incremental Inventory Import Status Email* • *Order Broker Polling Status Email* **Supplier Direct Fulfillment emails:** The organization locale is used to format the following emails generated through the Supplier Direct Fulfillment module: • *Change notification emails to retailer* • *Shipment or invoice upload error notification email to retailer* • *Out-of-balance invoice notification email to retailer* Emails to the vendor use the vendor's language and data formats. **Store Connect Emails:** The organization locale determines the formats to use on all emails generated through Store Connect. **Forms:** The organization locale determines the formats to used on forms generated by the vendor in Supplier Direct Fulfillment, or by the associate through Store Connect. **Reports:** The organization locale determines the formats to use on generated reports. **Settings that are not defined at the organization level:** The locale defined for the organization does not control the language displayed on screens, which is defined by the locale appended to the URL (for example, `?locale=fr`). Also, the locale defined for the organization does not control the date, time, or number formats displayed on screens, which are controlled by the Data Formats defined for the user profile, store associate user profile, or vendor. See the *User Profile Configuration*, *Store Associate User Profile*, or *New Vendor* screens for more information. See *Valid Locales and Associated Data Formats*, below, for a list of valid locales and the data formats applied to reports and emails. Defaults to United States-English. Required.
Organization Address	

Field	Description
Address Line 1 through Address Line 4	The organization's address. Up to 50 positions per line. Optional.
Suite	The organization's suite number. Up to 9 positions. Optional.
City	The organization's city. Up to 35 positions. Optional.
State/Province	The organization's state or province code. Up to 3 positions. Optional.
Postal Code	The organization's zip or postal code. Up to 10 positions. Optional.
Country	The organization's country code. 3 positions. Optional.
Phone	The organization's phone number. Optional.
Fax	The organization's fax number. Optional.
Return Address	
Address Line 1 through Address Line 4	The organization's return address. Up to 50 positions per line. Optional.
Suite	The suite number for the return address. Up to 9 positions. Optional.
City	The city for the return address. Up to 35 positions. Optional.
State/Province	The state or province code for the return address. Up to 3 positions. Optional.
Postal Code	The zip or postal code for the return address. Up to 10 positions. Optional.
Country	The country code for the return address. 3 positions. Optional.
Phone	The phone number for the return address. Optional.

Valid Locales and Associated Data Formats

Locale Code	Locale Description	Default Date Format	Default Time Format	Default Thousands separator	Default Decimal separator
zh-CN	Chinese-China	YYYY/MM/DD	AM/PM	Comma	Period
zh-SG	Chinese-Singapore	DD/MM/YYYY	AM/PM	Comma	Period
zh-HK	Chinese-Hong Kong	DD/MM/YYYY	AM/PM	Comma	Period
zh-TW	Chinese-Taiwan	YYYY/MM/DD	AM/PM	Comma	Period
nl-BE	Dutch-Belgium	DD/MM/YYYY	24 Hour	Period	Comma
nl-NL	Dutch-Netherlands	DD-MM-YYYY	24 Hour	Period	Comma
en-AU	English-Australia	DD/MM/YYYY	AM/PM	Comma	Period
en-CA	English-Canada	YYYY-MM-DD	AM/PM	Comma	Period
en-IN	English-India	DD/MM/YYYY	AM/PM	Comma	Period

Locale Code	Locale Description	Default Date Format	Default Time Format	Default Thousands separator	Default Decimal separator
en-IE	English-Ireland	DD/MM/YYYY	24 Hour	Comma	Period
en-MT	English-Malta	DD/MM/YYYY	24 Hour	Comma	Period
en-NZ	English-New Zealand	DD/MM/YYYY	AM/PM	Comma	Period
en-PH	English-Philippines	DD/MM/YYYY	AM/PM	Comma	Period
en-SG	English-Singapore	DD/MM/YYYY	AM/PM	Comma	Period
en-ZA	English-South Africa	YYYY/MM/DD	24 Hour	Space	Comma
en-GB	English-United Kingdom	DD/MM/YYYY	24 Hour	Comma	Period
en-US	English-United States	MM/DD/YYYY	AM/PM	Comma	Period
fr-BE	French-Belgium	DD/MM/YYYY	24 Hour	Space	Comma
fr-CA	French-Canada	YYYY-MM-DD	24 Hour	Space	Comma
fr-FR	French-France	DD/MM/YYYY	24 Hour	Space	Comma
fr-LU	French-Luxembourg	DD/MM/YYYY	24 Hour	Period	Comma
fr-CH	French-Switzerland	DD.MM.YYYY	24 Hour	Space	Comma
de-AT	German-Austria	DD.MM.YYYY	24 Hour	Space	Comma
de-DE	German-Germany	DD.MM.YYYY	24 Hour	Period	Comma
de-LU	German-Luxembourg	DD.MM.YYYY	24 Hour	Period	Comma
de-CH	German-Switzerland	DD.MM.YYYY	24 hour	Apostrophe	Period
it-IT	Italian-Italy	DD/MM/YYYY	24 Hour	Period	Comma
it-CH	Italian-Switzerland	DD.MM.YYYY	24 Hour	Apostrophe	Period
ja-JP	Japanese-Japan	YYYY/MM/DD	24 Hour	Comma	Period
pt-BR	Portuguese-Brazil	DD/MM/YYYY	24 Hour	Period	Comma
pt-PT	Portuguese-Portugal	DD/MM/YYYY	24 Hour	Space	Comma
ru-RU	Russian-Russia	DD.MM.YYYY	24 Hour	Space	Comma
es-AR	Spanish-Argentina	DD/MM/YYYY	24 Hour	Period	Comma

Locale Code	Locale Description	Default Date Format	Default Time Format	Default Thousands separator	Default Decimal separator
es-BO	Spanish-Bolivia	DD/MM/YYYY	24 Hour	Period	Comma
es-CL	Spanish-Chile	DD-MM-YYYY	24 Hour	Period	Comma
es-CO	Spanish-Colombia	DD/MM/YYYY	AM/PM	Period	Comma
es-CR	Spanish-Costa Rica	DD/MM/YYYY	24 Hour	Space	Comma
es-DO	Spanish-Dominican Republic	DD/MM/YYYY	AM/PM	Comma	Period
es-EC	Spanish-Ecuador	DD/MM/YYYY	24 Hour	Period	Comma
es-SV	Spanish-El Salvador	DD/MM/YYYY	24 Hour	Comma	Period
es-GT	Spanish-Guatemala	DD/MM/YYYY	24 Hour	Comma	Period
es-HN	Spanish-Honduras	DD/MM/YYYY	24 Hour	Comma	Period
es-MX	Spanish-Mexico	DD/MM/YYYY	24 Hour	Comma	Period
es-NI	Spanish-Nicaragua	DD/MM/YYYY	24 Hour	Comma	Period
es-PA	Spanish-Panama	MM/DD/YYYY	AM/PM	Comma	Period
es-PY	Spanish-Paraguay	DD/MM/YYYY	24 Hour	Period	Comma
es-PE	Spanish-Peru	DD/MM/YYYY	24 Hour	Comma	Period
es-PR	Spanish-Puerto Rico	MM/DD/YYYY	AM/PM	Comma	Period
es-ES	Spanish-Spain	DD/MM/YYYY	24 Hour	Period	Comma
es-US	Spanish-United States	DD/MM/YYYY	AM/PM	Comma	Period
es-UY	Spanish-Uruguay	DD/MM/YYYY	24 Hour	Period	Comma
es-VE	Spanish-Venezuela	DD/MM/YYYY	AM/PM	Period	Comma
sv-SE	Swedish-Sweden	YYYY-MM-DD	24 Hour	Space	Comma

Location Types

Purpose: Use this screen to work with the *location type*s within an organization.

What is a location type? The location type describes one or more locations within a *organization*. Each location type indicates the location category (store or warehouse), and can also provide additional information, such as “East Coast Stores” or “Outlet Stores.”

Location relationships: See *Organization, System, and Location* for an overview of the relationships among Order Broker elements, including location types.

Created how? You must create each location type within Order Broker. See *Setting Up Data for the Routing Engine Module* or *Setting Up Data for the Supplier Direct Fulfillment Module* for more information.

Use in OCDS or Merchandising Omni Services imports: When you configure your system to import data from *OCDS or Merchandising Omni Services*, you need to specify the location types to apply when creating store and warehouse locations. See the *OCDS Integration tab* at the System screen for more information on configuration, and see *OCDS or Merchandising Omni Services Imports* for background.

> **Note:**
>
> Only users with *Location Types* authority can display this screen. See the *Role Wizard* for more information.

Using an API to work with location types: You can also use an API to create, update, review, count, or delete location types. See the Operations Guide on My Oracle Support (MOS ID 2114324.1) for more information.

How to display this screen: Select *Location Types* from the Modern View home screen. See the *Modern View Overview* for background.

Options at this screen

Option	Procedure
create a new location type	1. Select **Add** from the *Actions* menu or select the Add icon (+) to open the **Add Location Type** window. 2. Complete each field. All fields are required. • Enter the description of the location type in the *Location Type Description* field. The name can be from 1 to 40 positions long and can include spaces and special characters. • Enter the location type code in the *Location Type Code* field. The location type code can be 1 to 10 positions long, can include spaces and special characters, and must be unique within the *organization*; however, other organizations can have the same location type code. Since the code is case-sensitive, you can create more than one location type with the same code but different case; for example, you can create a code of abcd and another of ABCD. • Select the *location category* from the *Category* drop-down box. Possible categories are Store or Warehouse. 3. Select **OK** or press enter to create the location type, or select **Save and Create Another** to continue creating location types.

Option	Procedure
search for a location type	The existing location types defined for your current organization are displayed. Use any combination of the fields at the top of the screen and tab through the search fields to restrict the search results to matching location types: • Optionally, enter a full or partial description in the *Location Type Description* field. When you tab through this field, the displayed location types are limited to those whose descriptions start with your entry, but that don't need to match completely. For example, if your entry is `st`, the location types with descriptions starting with Store or store are displayed. • Optionally, enter a full or partial code in the *Location Type Code* field. When you tab through this field, the displayed location types are limited to those whose codes start with your entry, but that don't need to match completely. • Optionally, select **Store** or **Warehouse** in the *Category* field to display location types of the same category. **Sort displayed location types:** You can also sort the displayed location types by clicking the up arrow (^) or down arrow next to each field title. **Clear filters:** Select **Clear Filters** to remove the criteria entered in the filter fields.
change the description or category of a location type	1. Highlight a displayed location type. 2. Select **Edit** from the *Actions* menu or click the Edit icon ( ) to open the **Edit Location Type** window. • You can edit the *Location Type Description* , or change the *Category* flag. See *Location Type Fields*, below, for details on fields. 3. Select **OK** or press enter to save your changes.
view a location type	1. Highlight a displayed location type. 2. Select **View** from the *Actions* menu or click the View icon ( ) to open the **View Location Type** window. See *Location Type Fields*, below, for details on fields.

> **Note:**
>
> You cannot delete a location type through this screen. You can use the API to delete a location type if it is not currently assigned to any locations. See the Operations Guide on My Oracle Support (MOS ID 2114324.1) for more information.

Fields at the Location Type screen

Field	Description
Location Type Description	The description of the location type. The name can be from 1 to 40 positions long and can include spaces and special characters. Case-insensitive for searching; for example, an entry of o matches a name of `Outlet`.
Location Type Code	See *location type*. The name can be from 1 to 10 positions long and can include spaces and special characters. Case-sensitive for searching; for example, an entry of o does not match a type of `OUT`.
Category	Either Store or Warehouse. See *location category*.

Fields at the Add, Edit, or Display Location Type windows

Field	Description
Location Type Description	The description of the location type. The name can be from 1 to 40 positions long and can include spaces and special characters. Required at the Add or Edit Location Type windows.
Location Type Code	See *location type*. The name can be from 1 to 10 positions long and can include spaces and special characters. Required at the Add Location Type window; otherwise, display-only.
Category	Either Store or Warehouse. See *location category*. Required at the Add or Edit Location Type windows.

Order Reason Codes

Purpose: Use this screen to work with reason codes used by store associates or managers in Store Connect to:

- reject a delivery, ship-for-pickup, or pickup order, or a line on a delivery, ship-for-pickup, or pickup order
- cancel a pickup, ship-for-pickup, or delivery order, or a line on a pickup, ship-for-pickup, or delivery order

Cancel or reject reasons: Use the Cancel or Reject tabs at the top of the screen to work with either cancel reasons or reject reasons.

Auto Cancel Reason: You can also use this screen to create the *Auto Cancel Reason* to use when an unclaimed pickup or ship-for-pickup order is not picked up within a specified number of days. Note that you should not deactivate the *Auto Cancel Reason* code specified at the **Preferences** screen. See *Auto-Cancel Unclaimed Orders* for background.

Using an API to work with order reason codes: You can also use an API to create, update, review, count, or delete order reason codes. See the Operations Guide (MOS ID 2114324.1) for more information.

How to display this screen: Select *Order Reason Codes* from the Modern View home screen. See the *Modern View Overview* for background.

> **Note:**
>
> Only users with *Order Reason Codes* authority can display this screen. See the *Role Wizard* for more information.

Option	Procedure
switch between Cancel and Reject reason codes	Use the **Cancel** and **Reject** tabs below the screen title to switch between the two types of order reason codes.
create a new reason code	The steps to create a new Cancel reason code and a Reject reason code are the same. 1. Optionally, select a different *organization*. See the *Modern View Overview* for background. **Note:** You must complete the *Preferences* screen for an organization before you can select it. 2. Select **Add** from the *Actions* menu or select the Add icon (+) to open the **Add Cancel Order Reason Code** or the **Add Reject Reason Code** window, depending on whether the **Cancel** or **Reject** tab is selected at the top of the screen below the screen title. 3. Complete each of the required fields. See *Fields at the Add, Edit, or View Order Cancel or Order Reject Reason Code Windows*, below, for details on fields. 4. Select **OK** or press enter to create the reason code, or select **Save and Create Another** to continue creating reason codes.

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>search for a reason code</td><td>The existing cancel or reject reason codes defined for your current organization are displayed below the selected type. Use any combination of the fields at the top of the screen, as well as selecting either the Cancel or Reject tabs at the top of the screen below the screen title, and then tab through the search fields to restrict the search results to matching reason codes:

Optionally, enter a full or partial reason code description. When you tab through this field, the displayed reason codes are limited to those whose descriptions start with your entry, but that don’t need to match completely. For example, if your entry is <code>Cu</code>, the reason codes with descriptions of Customer Request or Customer No-Show or displayed.
Optionally, enter a full or partial reason code in the Order Reason Code field. When you tab through this field, the displayed reason codes are limited to those whose codes start with your entry, but that don’t need to match completely. For example, if your entry is <code>2</code>, the reason codes starting with 2 are displayed.
Optionally, select Yes or No in the Active fields to display matching reason codes.

Sort displayed reason codes: You can also sort the displayed reason codes by clicking the up arrow (^) or down arrow next to each field title.

Clear filters: Select Clear Filters to remove the criteria entered in the filter fields.</td></tr>
<tr><td>edit a reason code definition</td><td>
Highlight a displayed reason code.
Select Edit from the Actions menu or click the Edit icon ( ) to open the Edit Cancel Order Reason Code or Edit Reject Order Reason Code window. You can edit the Order Reason Code Description or change the setting of the Active flag. See Fields at the Add, Edit, or View Order Cancel or Order Reject Reason Code Windows, below, for details on fields.
Select OK or press enter to save your changes.

Note that you should not deactivate the Auto Cancel Reason code specified at the Preferences screen</td></tr>
<tr><td>delete a reason code</td><td>
Highlight a displayed reason code.
Select Delete from the Actions menu or click the Delete icon ( ).
Select OK at the Confirm Deletion window to delete the reason code.

Note: You can delete a reason code only if it is not specified as the Auto Cancel Reason at the Fulfillment tab of the Preferences screen.</td></tr>
<tr><td>view a reason code definition</td><td>
Highlight a displayed reason code.
Select View from the Actions menu or click the View icon ( ) to open the View Cancel Order Reason Code or View Reject Order Reason Code window. See Fields at the Add, Edit, or View Order Cancel or Order Reject Reason Code Windows, below, for details on fields.
</td></tr>
</table>

Fields at the Order Reason Codes screen

Field	Description
Order Reason Code Description	The description of the reason code. The description can be from 1 to 35 positions long and can include spaces and special characters.
Order Reason Code	The name of the reason code. The name can be from 1 to 30 positions long and can include spaces and special characters. The code identifies a reason to: • reject a delivery, ship-for-pickup, or pickup order, or a line on a delivery, ship-for-pickup, or pickup order • cancel a delivery, ship-for-pickup, or pickup order, or a line on a delivery, ship-for-pickup, or pickup order • automatically cancel an unclaimed pickup or ship-for-pickup order, if the code is specified in the *Auto Cancel Reason* field at the **Preferences** screen. The code name can be from 1 to 30 positions long and can include spaces and special characters.
Active	Indicates whether the reason code is available for selection in Store Connect when an associate or manager is canceling or rejecting an order or line. Select *Yes* or *No* to display reason codes that match your selection.

Fields at the Add, Edit, or View Order Cancel or Order Reject Reason Code Windows

All fields are enterable at the **Create Order Reason Codes** window. All fields except the *Order Reason Code* are enterable at the **Edit Cancel Order Reason Code** or **Edit Reject Order Reason Code** window. All fields are display-only at the **View Cancel Order Reason Code** or **View Reject Order Reason Code**window.

Field	Description
Order Reason Code Description	The description of the reason code. Can be up to 35 positions. Required when creating or editing a reason code.
Order Reason Code	The code identifying the reason to: • reject a delivery or pickup order, or a line on a delivery or pickup order • cancel a pickup or delivery order, or a line on a pickup or delivery order • automatically cancel an unclaimed pickup order, if *Auto-Cancel Unclaimed Orders* is enabled Your entry can be up to 30 positions. Required when creating a new code; otherwise, display-only.
Active	Indicates whether the reason code is available for selection by the store associate or manager when canceling or rejecting an order or line in Store Connect. Note that you should not deactivate the *Auto Cancel Reason* code specified at the **Preferences** screen

7 Home Screen

Purpose: The home screen is the first screen that opens in Order Broker. From this screen, you can select the screens and windows listed below.

Modern View: See the *Modern View Overview* for information on advancing to Modern View and a list of the options available.

Orders Menu:

- *Order Inquiry*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Trace Shopping Log*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Order*: Available if Use Routing Engine is selected at the *Tenant* screen.
    - *System Products*: Available if Use Routing Engine is selected at the *Tenant* screen.
    - *Browse Order Item*: Available if Use Routing Engine is selected at the *Tenant* screen.
    - *Edit Order Item*: Available if Use Routing Engine is selected at the *Tenant* screen.
    - *Order History Detail - Address Change Window*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Purchase Order Inquiry*: Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Purchase Order*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Browse Detail Customizations*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Browse Purchase Order Detail Messages*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Display Purchase Order Item*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Purchase Order History Detail*: Available if Use Vendor Portal is selected at the *Tenant* screen.
- *Invoice Inquiry*: Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Invoice*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Browse Invoice Detail*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Approve Invoice*: Available if Use Vendor Portal is selected at the *Tenant* screen.

Products Menu: Used by the Routing Engine module.

> **Note:**
>
> Screens indicated with an asterisk (*) are available from the *Products* dropdown menu but not from the *Products* area of the home screen.

- *Products*
  - *New Product*
  - *Edit Product*
  - *System Products*
    - *Edit System Product*
  - *Product Locations*
    - *New Product Location*
    - *Browse Product Locations*
    - *Edit Product Location*
  - *Product Attributes*: Used for the Routing Engine module.
    - *New Product Attribute*: Used for the Routing Engine module.
    - *Edit Product Attribute*: Used for the Routing Engine module.
- *Probability Rules*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Calculations*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Probability Rule Wizard*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Probability Location*: Available if Use Routing Engine is selected at the *Tenant* screen.
-
- **Probable Quantity Rules*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - **New Probable Quantity Rule*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - **Edit Probable Quantity Rule*: Available if Use Routing Engine is selected at the *Tenant* screen.
- **Probable Quantity Location*: Available if Use Routing Engine is selected at the *Tenant* screen.

  Locations Menu:

> **Note:**
>
> Screens indicated with an asterisk (*) are available from the *Locations* drop-down menu but not from the *Locations* area of the home screen.

- *Organizations and Preferences*
  - *Preferences*: Available if Use Routing Engine is selected at the *Tenant* screen.

  - *Drop Ship Preferences*: Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Store Connect Preferences*: Available if Use Store Connect is selected at the *Tenant* screen.
- *Order Broker Preference Overrides*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Edit Order Broker Preference Override*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Browse Order Broker Preference Override*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Locations*
  - *New Location*
  - *Edit Location*
  - *Location Attributes*: Used for the Routing Engine module.
    - *New Location Attribute*: Used for the Routing Engine module.
    - *Edit Location Attribute*: Used for the Routing Engine module.
- *Location Bulk Updates*: Used for the Routing Engine module.
- *Fulfillment Zones*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Fulfillment Zone Wizard*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Browse Fulfillment Zones*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Vendors*: Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *New Vendor*: Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Edit Vendor*: Available if Use Vendor Portal is selected at the *Tenant* screen.

Reports Menu:

- *Run Reports*
- *Schedule Reports*
  - *Schedule Report*
- *View Reports*
  - Used for the Routing Engine module:
    - *Location Import Errors Report*
    - *Order Status Report*
    - *Product Barcode Import Errors Report*
    - *Product Import Errors Report*
    - *Unfulfillable Report*
    - *Zone List Report*
  - Used for the Supplier Direct Fulfillment module:
    - *Invoice Detail Report*.

      * *PO Item Status Report*
      * *Vendor Aging Detail Report*
      * *Vendor Aging Summary Report*

> **Note:**
>
> Screens indicated with an asterisk (*) are available from the *Systems* dropdown menu but not from the *Systems* area of the home screen.

Systems Menu:

- **View Active Schedules*
  - *Auto Cancel Unclaimed Pickup Orders History*
  - *Browse Active Schedules*
  - *Completed Order Private Data Purge History*
  - *Daily Clean Up Job History*
  - *Email Notifications Job History*
  - *Fulfilled Inventory Export History*
  - *Identity Cloud User Synchronization History*
  - *Incremental Imports History*
  - *Inventory Quantity Export History*
  - *Sales Order Data Extract Job History*
  - *Product Imports History*
- **View Job History*
- **Schedule Jobs*

  For more information on imports:
  - *Importing Locations through File Storage API*
  - *Importing Products, System Products, and Item Image URLs through File Storage API*
  - *Importing Product Locations through File Storage API*
  - *Importing UPC Barcodes through File Storage API*
- *Event Logging*
- **Roles*
  - *Browse Role*
  - *Role Wizard*
- *User Profiles*
  - *User Profile Configuration*
  - *Browse User Profile*
- *Vendor User Profiles*: Available if Use Vendor Portal is selected at the *Tenant* screen.

  - *Vendor User Profile*: Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Browse Vendor User Profile*: Available if Use Vendor Portal is selected at the *Tenant* screen.
- *Store Associate User Profiles*: Available if Use Store Connect is selected at the *Tenant* screen.
  - *Edit Store Associate User Profile*: Available if Use Store Connect is selected at the *Tenant* screen.
  - *Browse Store Associate User Profile*: Available if Use Store Connect is selected at the *Tenant* screen.
- *Proximity Uploads*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Systems*
  - *System*
- **Tenant*: advance to either the *Tenant (retailer information)* screen or the *Tenant-Admin* screen, depending on whether you are an *admin user*
- **Web Service Authorization*
  - **New Web Service User*
    - **Web Service User*
- *Manage External Application Access*
  - *Edit Web Services*
  - *Generate Application Client*
  - *Regenerate Application Client Secret*
- **File Storage History*

Documentation:

- Operations Guide
- Data Dictionary
- Vendor Portal Online Help: Available if Use Vendor Portal is selected at the *Tenant* screen.
- Store Connect Help: Available if Use Store Connect is selected at the *Tenant* screen.
- Vendor Integration Guide: Available if Use Vendor Portal is selected at the *Tenant* screen.
Also available from the home screen:

About Order Broker

8 Orders Menu

- *Order Inquiry*: Used for the Routing Engine module. Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Trace Shopping Log*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Order*: Available if Use Routing Engine is selected at the *Tenant* screen.
    - *System Products*: Available if Use Routing Engine is selected at the *Tenant* screen.
    - *Browse Order Item*: Available if Use Routing Engine is selected at the *Tenant* screen.
    - *Edit Order Item*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Purchase Order Inquiry*: Used for the Supplier Direct Fulfillment module. Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Purchase Order*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Browse Detail Customizations*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Browse Purchase Order Detail Messages*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Display Purchase Order Item*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Purchase Order History Detail*: Available if Use Vendor Portal is selected at the *Tenant* screen.
- *Invoice Inquiry*: Used for the Supplier Direct Fulfillment module. Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Invoice*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Browse Invoice Detail*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Approve Invoice*: Available if Use Vendor Portal is selected at the *Tenant* screen.
    - *Reject Invoice*: Available if Use Vendor Portal is selected at the *Tenant* screen.

Order Inquiry

Purpose: Use the **Order Inquiry** screen to search for and review Order Broker orders sent from an integrated system, such as Xstore or Order Management System, for fulfillment by another integrated system.

Used for the Routing Engine module.

How to display this screen: Select *Order Inquiry* from the *Home Screen* or the *Orders Menu*.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. This screen is accessible to users with *Order Inquiry* authority. See the *Role Wizard* for more information.

How to display orders on this screen

When you first advance to the **Order Inquiry** screen, the *organization* associated with your *Default Shipping System* is selected by default, but no orders are displayed. Click *Search* to retrieve the last 50 orders in your organization, or select additional search criteria.

Sort order: The orders are sorted based on *Request ID*. The Request ID is a unique number assigned by the Routing Engine when an integrated system assigns an order or order line to the Order Broker for fulfillment.

How to view order updates? Click *Search* to refresh the screen.

> **Note:**
>
> This screen functions only after you have created at least one order in Order Broker.

Customer name anonymized? If the customer data on an order has been *anonymized* (deleted and replaced with asterisks), the customer name is displayed as:

*** ***

***

In this case, searching by customer name or company name is not supported.

An order is eligible to be anonymized only if it is no longer open.

See *Anonymizing Data* for background.

Options at this screen

Option	Procedure
search for orders	When you first advance to this screen, no orders are displayed and the *organization* associated with your *Default Shipping System* is selected by default. Use any combination of the fields at the top of the screen to restrict the search results. **Case?** All the enterable fields on this screen are case-insensitive for searching; for example, an entry of `a` or `A` matches a name of `Adams`.

Option	Procedure
review the reasons why the Routing Engine eliminated individual locations from sourcing the order	Click the *Trace Log* icon ( ) to advance to the Trace Shopping Log screen, where you can review the reasons why the Routing Engine filtered each possible location from sourcing the order. • The Routing Engine traces shopping logic only if the Trace Shopping Logic field is set to *Detailed* at the **Event Logging** screen. Typically, you would select to trace shopping logic only to research why certain locations are or aren't selected to fulfill orders. • These history records are retained only for the number of Trace Log History days specified at the Tenant-Admin screen; after that number of days, the daily cleanup job automatically deletes the records. • If the Trace Shopping Logic screen is already open in another tab, you advance to that screen, where the previously-selected order is displayed.
view order details or update an order	Click the *Edit/Display* icon ( ) to advance to the Order screen, where you can view order details and history or update an order if you have *Order Maintenance* authority. **Note:** If the Order screen is already open in another tab, you advance to that screen, where the previously-selected order is displayed.

Fields at this screen

Fields	Description
Search fields	**Case?** All the enterable fields on this screen support case-insensitive searching; for example, an entry of `a` or `A` matches a name of `Adams`.
Organization	See *organization*. Defaults from the organization associated with the Default Shipping System from your user profile, but you can override this default.
Request ID	A unique number to identify the order within Order Broker. Assigned by the Routing Engine when it creates the order. Depending on your integration and the type of order, each individual order line might create a separate order in the Order Broker, or might be included with other lines from the originating order in the external system. **Note:** The numbers might not always be in sequential order.
Order Number	The number or code identifying the order in the originating system. From the `order id` passed in the *submit order message*. Can be up to 30 positions. **Case:** If the originating system includes any lowercase letters in the order number, Order Broker converts them to uppercase when creating the order. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.

Fields	Description
Placed Location	The location where the order originated; see *placed location* for a discussion.
Sourced Location	The location supplying the inventory for a *ship-for-pickup order*. **Multiple locations?** If an order includes lines assigned to multiple sourcing locations, searching based on a sourcing location produces a list of orders that include lines assigned to the specified location.
Pickup Location	The location where the customer picks up a *pickup order* or *ship-for-pickup order*.
Date Ordered	The transaction date passed in the *submit order message*. Might not be the same as the date when the order was created.
Order Status	The order-level status, which can be different from the various line-level statuses if the Allow Split Order preference is selected. See *Order and Line Statuses*. **Under Review?** The words Under Review follow the order status in parentheses if the order's *Under Review* flag is selected. You might need to adjust the column widths to display these words.
Order Type	Possible order types are: • *Delivery* = The order is shipped to the customer from the fulfilling location. See *Delivery Order* for a discussion. *Pickup* = The customer goes to the fulfilling location, where the merchandise is already in stock, to pick up the order, See *Pickup Order* for a discussion. *Ship For Pickup* = The customer wants to pick up the order in a store location, and the inventory can be sourced from a location that differs from the pickup location and the originating location. **Customer name anonymized?** If the customer data on an order has been *anonymized* (deleted and replaced with asterisks), searching by the original company name, first name, or last name is not supported. See *Anonymizing Data* for background.
Company Name	The sold-to customer's company name, if it was passed in the *submit order message*. Not case-sensitive for searching; an entry of `A` or `a` matches a company name of `Acme`.
First Name	The sold-to customer's first name, if it was passed in the *submit order message*. Not case-sensitive for searching; an entry of `A` or `a` matches a first name of `Alice`.
Last Name	The sold-to customer's last name, if it was passed in the *submit order message*. Not case-sensitive for searching; an entry of `A` or `a` matches a last name of `Allen`.

Fields	Description
Postal Code	The sold-to customer's postal or zip code from the *submit order message*. **Case:** If the originating system includes any lowercase letters in the postal code, Order Broker converts them to uppercase when creating the order. Not case-sensitive for searching; an entry of `A` or `a` matches a postal code of `A1A OB1`.
Result fields	
Request ID	The screen sorts by *Request ID*.
Order Number	See *Order Number*.
Customer	The sold-to customer's first and last name, followed by the customer's company name. Based on the information passed in the *submit order message* for the customer. **Customer name anonymized?** If the customer data on an order has been *anonymized* (deleted and replaced with asterisks), the customer name is displayed as: *** *** *** See *Anonymizing Data* for background.
Placed Location	The location that originated the order.
Sourced Location	The location supplying the inventory for the order. A location of *Multiple* is listed if Split Order is enabled and the order is split across sourcing locations.
Pickup Location	The location where the customer picks up the order. Blank for a delivery order.
Date Ordered	The transaction date passed in the *submit order message*. Might not be the same as the date when the order was created.
Order Status	See *Order and Line Statuses*. *Under Review?* If the order is currently flagged as Under Review, meaning that the fulfilling system needs to delay shipping or fulfilling the order, the message (Under Review) is listed next to the order status. Depending on your browser settings, you might need to broaden the column to read this message. See the *Under Review* field at the **Order** screen for more information.
Order Type	See *Order Type*, above.
Postal Code	The sold-to customer's *Postal Code* or zip code.

Fields	Description
Trace Log	Click the *Trace Log* icon ( ) to advance to the *Trace Shopping Log* screen, where you can review the reasons why the Routing Engine eliminated each possible location from sourcing the order. • The Routing Engine traces shopping logic only if the *Trace Shopping Logic* field is set to *Detailed* at the **Event Logging** screen. Typically, you would select to trace shopping logic only to research why certain locations are or aren't selected to fulfill orders. These history records are retained only for the number of Trace Log History days specified at the *Tenant-Admin* screen; after that number of days, the *daily cleanup job* automatically deletes the records. If the *Trace Shopping Logic* screen is already open in another tab, you advance to that screen, where the previously-selected order is displayed.
Edit	Click the *Edit/Display* icon ( ) to advance to the *Order* screen, where you can view order details and history or update an order if you have *Order Maintenance* authority. If the *Order* screen is already open in another tab, you advance to that screen, where the previously-selected order is displayed.

Trace Shopping Log

Purpose: Use the **Trace Shopping Log** screen to view the existing product locations that the *Routing Engine* considered for placement of an order or line for sourcing, and the reason why each location was filtered from selection.

Simple trace example: A simple shopping logic trace for a product with four product location records might include the Routing Engine evaluating the locations as follows:

1. Initial list: The Routing Engine identifies each of the four product location for the requested item.
2. The Routing Engine filters out location A because it does not support the order type, based on the *Fulfillment* settings at the **Preferences** screen.
3. The Routing Engine filters out location B because it does not have sufficient inventory of the requested item(s).
4. The Routing Engine filters out location C because it is the requesting location.

The shopping trace entries displayed for the order might include:

- First, all product locations that for the product:
  - Initial List / Location A
  - Initial List / Location B
  - Initial List / Location C
  - Initial List / Location D
- Next, location A is filtered because it does not support the order type, for example:

  - Does not support Order Type / Location A
- Next, location B is filtered because it does not have sufficient inventory, for example:
  - Location has insufficient inventory / Location B
- Next, location C is filtered because it was the requesting location, for example:
  - Requesting Location / Location C

Location D is selected for the order; however, there is no entry at the *Trace Shopping Log* screen for the selected location. You can review the selected location at the *Order* screen.

See *Trace Log Elimination Reasons*, below, for a list of possible reasons why the Routing Engine might filter out a location.

When the Routing Engine takes multiple passes through possible locations: There are situations when the Routing Engine evaluates potential locations more than once and writes trace records for filtering a location each time, although one or more of the locations might ultimately be selected to fulfill or source the order.

- **If order must be split and split order is supported:** For example, an order includes two items. The Routing Engine first looks for a single location that can fulfill both order lines, but does not find a single location for both.Then, if splitting orders is selected, the Routing Engine checks whether the order can be fulfilled by splitting the lines across location A and location B.

  In this type of scenario, a shopping trace entry might first indicate a reason that location A and location B are filtered; however, these two locations are ultimately selected in a subsequent pass.
- **If zone fulfillment is in use:** For example, the shipping address is within a fulfillment zone that includes both primary and alternate locations. The Routing Engine first evaluates the primary locations but does not find one or more primary locations that can fulfill the order. The Routing Engine then evaluates the alternate locations. If the order cannot be fulfilled in one or more alternate locations, the Routing Engine then evaluates whether the order can be fulfilled by splitting across any primary and alternate locations.

  In these scenarios, a trace log can indicate a reason for filtering a location, although the location might ultimately be selected in a subsequent pass. For example, location A and location B are eliminated separately in the first pass, but are ultimately selected to fulfill individual order lines in a subsequent pass.

> **Note:**
>
> The Routing Engine evaluates multiple locations only if your organization supports *splitting orders*.

Demonstrates filtering rather than selection: Use the **Trace Shopping Log** screen to determine how locations are filtered from shopping, rather than how the remaining eligible locations are selected. Once the Routing Engine has determined the remaining locations after ineligible locations are filtered, the Routing Engine or the *Science Engine* selects the sourcing location based on the *Standard Brokering* or *Weighted Brokering* settings at the **Preferences** screen.

Enabling shopping logic tracing: Shopping log records are created only when *Trace Shopping Logic* at the **Event Logging** screen is set to *Detailed*.

> **Note:**
>
> Oracle recommends that you turn on shopping logic tracing to research questions related to how the Routing Engine is selected locations, but to otherwise keep tracing turned off in order to enhance system performance.

Shopping logic records created when? You can use trace shopping log records to track how the Routing Engine eliminates potential locations for sourcing a delivery or ship-for-pickup order after:

- A *submit order message* is received.
- A *status update* request is received, rejected the order or line.
- A store associate rejects the order or line in Store Connect.
- You change the status of an order to rejected through the *Order* screen, if splitting orders is not enabled.
- You change the status of an order line to rejected through the *Edit Order Item* window, if splitting orders is enabled.

The above scenarios related to rejecting an order line include the possibility of rejecting a partial quantity of the line if the Allow Partial Updates preference is selected.

Not created? Trace log records are not created when:

- The Routing Engine or the Science Engine selects the sourcing location. The screen displays only reasons for eliminating a location, not reasons for selecting a location.
- There are no product locations for the item.
- The pickup location rejects a pickup or ship-for-pickup order.
- You select a different location at the **Order** screen or the **Edit Order Item** window.
- A *locate items* or *product availability search* request is received.
- The order or line is put in Unfulfillable status because the Search Retries specified at the **Preferences** screen has been met.

Purging trace log records: The *daily cleanup job* purges trace log records for closed, completed, canceled, and unfulfillable orders when the shopping date is older than number of days specified in the Trace Log History setting at the *Tenant-Admin* screen.

Used for the Routing Engine module.

How to display this screen: Click the Trace Log icon () at the *Order Inquiry* screen. Available if Use Routing Engine is selected at the *Tenant* screen, regardless of whether Trace Shopping Logic is currently enabled.

> **Note:**
>
> If the **Trace Shopping Log** screen was already open in another tab when you clicked the edit/display icon, you advance to this screen with the previously-selected order data displayed.

Options at this screen

Option	Procedure
Filter the Shopping Trace Records Displayed	
Filter the displayed shopping trace records based on criteria such as trace type, item, reason, location code or name, or associated system	See the *Search and Filter Options*, below.

Fields at this screen

Fields	Description
Order Number	See *Order Number*.
Request ID	See *Request ID*.
Search and Filter Options	Optionally, use one or more of the following search options to restrict the displayed shopping trace records to those that match your entries or selections.

Fields	Description

Trace Type	Select a trace type and click *Search* to display shopping trace records created during that trace type. Possible types include:
	• *Initial Routing:* The Routing Engine identifies all possible product location records.
	• *Initial Routing (Primary Locations):* The Routing Engine identifies all possible primary locations for the zone when *zone fulfillment* is in effect and the customer's address is within the zone.
	• *Initial Routing (Alternate Locations):* The Routing Engine identifies all possible alternate locations for the zone when *zone fulfillment* is in effect, the customer's address is within the zone, and one or more locations were not found in the list of primary locations.
	• *Initial Routing (Primary and Alternate Locations):* The Routing Engine identifies all possible primary and alternate locations when zone fulfillment is in effect, the customer's address is within the zone, and one or more locations were not found in the list of primary locations or the list of alternate locations, so the combination of primary and alternate locations are now evaluated.
	• *Reshop - N (Location Zone Type):* The Routing Engine begins the routing process again because the fulfilling or sourcing location has rejected the order, where:
	  – The *N* indicates the pass for reshopping, and,
	  – The Location Zone Type indicates the type(s) of location zones being evaluated. Possible types are *Primary Locations*, *Alternate Locations*, and *Primary and Alternate Locations*.
	Example: The Trace Type for the second pass over primary and alternate locations is *Reshop - 2 (Primary and Alternate Locations)*.
	
	Note:
	The Routing Engine evaluates multiple locations only if your organization supports *splitting orders*.

Item	Enter a full or partial item code and click *Search* to display shopping trace records for items that start with your entry or match it completely.
Reason	Select a reason why the location was eliminated, or select *Initial List*, and click *Search* to display shopping trace records that match your entry. See *Trace Log Elimination Reasons*, below, for information on possible reasons.

Fields	Description
Location	Enter a complete, valid location code and click *Search* to display shopping trace records for that location.
Name	Enter a full or partial location name and click *Search* to display shopping trace records for locations whose names include your entry. **Note:** This is the name at the time the trace history record was created. If you have changed the name of the location since that time, searching based on the new name may not succeed.
System	Select a system and click *Search* to display shopping trace records for locations associated with the selected system. Only systems associated with the organization related to the order are available for selection.
Results	
Reason	The reason why the location was eliminated from selection; otherwise, set to *Initial List*. See *Trace Log Elimination Reasons*, below. **Note:** If the entire reason is not displayed, you can drag the Reason heading to the right to widen the displayed information.
Reason Value	The value related to the reason. Included only when related to zone, distance, attribute, or probability rule. If related to: • Zone: Indicates the zone name. • Proximity distance: Indicates 50 - miles, where 50 is the Default Distance and miles is the unit of measure; confirm with ship-for-pickup) • Attribute: Indicates the attribute name. • Probability rule: Indicates the probability rule name. Otherwise, this field is blank.

Fields	Description
Location	The code identifying the *location*. **Note:** The name and address for the location displayed here, as well as the available quantity of the item, is based on the information from when the shopping trace record was written, and may differ from the current information if the location record has been edited or the available quantity has changed.
Name	The name of the location at the time when the shopping took place.
City	The city for the location at the time when the shopping took place.
State/Province	The state or province for the location at the time when the shopping took place.
Postal	The postal or zip code for the location at the time when the shopping took place.
System	The *system* associated with the location.
Available Qty	The *available to promise quantity* of the item in the location at the time when the shopping took place.
Date/Time	The date and time when the shopping took place.

Trace Log Elimination Reasons

The following table lists possible reasons why a potential sourcing location was filtered from eligibility.

Reason	Description (Reason Why Location was Filtered from Eligibility)
Disallow shopping within same System	The Disallow shopping within same system flag was selected at the *System* screen, and the location is associated with the same system as the requesting location.
Does not support Order Type	The location was not eligible to fulfill the order based on the *Fulfillment* settings at the *Preferences* screen.
Does not support Sourcing orders	Ship-for-pickup orders are supported, and the location was not eligible to source the order based on the *Fulfillment* settings at the *Preferences* screen.

Reason	Description (Reason Why Location was Filtered from Eligibility)
Initial list	The location was included in the initial list of potential locations for the Trace Type because there was a product location record. Initial list trace records are listed before the subsequent trace records indicating why each location is eliminated from eligibility. **If no availability?** If you use *standard brokering*, only product locations with an *available to promise quantity*, or that are flagged as Backorder Available at the **Preferences** screen, are included in the initial list. Otherwise, if you use *weighted brokering*, product locations with no availability are included in the initial list, but then eliminated afterward with the *Zero Availability* reason.
Location at Maximum Daily Order Count	Use Maximum Order Limits was selected at the *Preferences* screen, and the location was filtered because it had already met the *Maximum Daily Orders*.
Location cannot be fulfilled from Alternate Search Locations for Zone	*Fulfillment Zones* were in use and the location was not assigned as an alternate location to the zone for the shipping address. In this case, the fulfillment zone name is indicated as the *Reason Value*.
Location cannot be fulfilled from Combined Primary and Alternate Search Locations for Zone	*Fulfillment Zones* were in use and the location was not assigned to the zone for the shipping address as either a primary or alternate location. In this case, the fulfillment zone name is indicated as the *Reason Value*.
Location cannot be fulfilled from Primary Search Locations for Zone	*Fulfillment Zones* were in use and the location was not assigned as a primary location to the zone for the shipping address. In this case, the fulfillment zone name is indicated as the *Reason Value*.
Location does not match Location Attribute	Use Attribute Rules was selected at the *Preferences* screen, the requesting location had a location attribute assigned with a use of originating, and the location was filtered because it was not assigned the same attribute with a use of sourcing. For example, the requesting location supports originating orders for brands A, but the location does not support sourcing orders for brand A. In this case, the attribute name is indicated as the *Reason Value*.

Reason	Description (Reason Why Location was Filtered from Eligibility)
Location does not match Product and Location Attribute	Use Attribute Rules was selected at the *Preferences* screen, the item had a product and location attribute assigned, and the location was filtered because it was not assigned the same attribute. For example, the item requires engraving, but the location does not support engraving. In this case, the attribute name is indicated as the *Reason Value*.
Location does not support Gift Wrap	Use Attribute Rules was selected at the *Preferences* screen, the order required gift wrap, and the location was filtered because its Gift Wrap flag was not selected.
Location has insufficient inventory	The requested quantity was more than the *available to promise quantity* for the location. **Note:** There may be subsequent shopping trace entries if splitting lines is supported, because the Routing Engine attempts to fulfill the line by splitting against eligible locations.
Location is not common for all products	Allow Split Order was not selected at the *Preferences* screen, the order included more than one order line, and there was not a product location record for this item at this location, although there was a product location for one or more other items on the order.
Location is not eligible to source Product Attribute	The submit order request specified an attribute for the product that was not associated with the location. For example, the submit order request specified brand A for the product, but the location does not support sourcing orders for brand A.
Previously Assigned Location not Eligible	The location was previously assigned as a fulfilling or sourcing location and the order or line was rejected.
Probability Rule	The location was filtered based on a probability rule. For example, a probability rule was set to exclude the location or lower the available quantity. In this case, the probability rule name is indicated as the *Reason Value*.

Reason	Description (Reason Why Location was Filtered from Eligibility)
Proximity distance	The location's distance from the customer's address is more than: • The Sourcing Distance defined at the *Preferences* screen if this is a ship-for-pickup order, or • The Default Distance defined at *Preferences* screen if this is a delivery order. • The *Maximum Turn-by-Turn Distance*, if you are using *Turn-by-Turn Distance Calculation for Delivery Orders*. In this case, the maximum distance and the unit of measure are indicated as the *Reason Value*, for instance, `50 – miles`. **Note:** This reason can occur even if the location is included in a fulfillment zone for the shipping address.
Requesting Location	This is the location where the order originated.
Shopping by common location. Location has insufficient inventory	Allow Split Order was selected at the *Preferences* screen, the order included more than one order line, this was a common location for the items, and the requested quantity of this item was not available at this location.
Split Line Off - Location has insufficient inventory	Allow Split Line was not selected at the *Preferences* screen and there was a product location for the item at this location, but not enough to fulfill the full line quantity.
Split Line On - Location has insufficient inventory	Allow Split Line was selected at the *Preferences* screen and there was a product location for the item at this location, but not enough to fulfill the full line quantity. This shopping trace entry comes after the *Location has insufficient inventory* entry.
Split Order On - Location has insufficient inventory	Allow Split Order was selected at the *Preferences* screen, the order included more than one order line, and the requested quantity of this item was not available at this location. This shopping trace entry comes after the *Location has insufficient inventory* entry.
Un-Requested Location	A different location was specified as the fulfilling or sourcing location for the order.

Reason	Description (Reason Why Location was Filtered from Eligibility)
Zero Availability	Exclude Locations with Zero Availability was selected at the *Preferences* screen, and the location was filtered because the *available to promise quantity* for the product in the location is zero or less and the location does not allow backorders. **Note:** This reason can apply only when *weighted brokering* is in use.

Order

Purpose: Use the **Order** screen to view the details and activity of an order, or update the order's status, or sourcing location, if you do not split orders (If you do split orders, you can use the *Edit Order Item* window to update an item's status, or sourcing location). This screen is accessible to users with *Order Inquiry* authority; however, all fields are display-only if the user does not have *Order Maintenance* authority. See the *Role Wizard* for more information.

Used for the Routing Engine module.

Customer name anonymized? If the customer data on an order has been *anonymized* (deleted and replaced with asterisks), the customer name is displayed as:

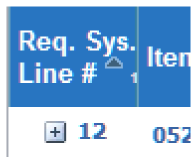
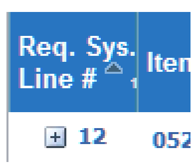
See *Anonymizing Data* for background.

How to display this screen: Click the edit/display icon ( ) at the *Order Inquiry* screen. Available if Use Routing Engine is selected at the *Tenant* screen.

> **Note:**
>
> If the **Order** screen was already open in another tab when you clicked the edit/display icon, you advance to this screen with the previously-selected order displayed.

Options at this screen

Option	Procedure
Viewing Options	

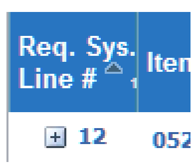
Option	Procedure
view order totals, addresses, and summary information	Click the *Header tab*. This tab is selected by default.
view the items on the order	Click the *Details tab*.
view the activity that has taken place for each item on the order	Click the *History tab*.
view the existing system products for an item on the order	Click the system products icon ( ) for an item on the *Details tab* to advance to the System Products window. **Line split?** If the line is split, this icon is available only after you click the plus sign for the requesting system line number to display additional fields and options:  See the *Details tab*, below, for a discussion.
view additional information about an item, including the description, price and tax, and polled count, in a single window	Click the edit/display icon ( ) for an item on the *Details tab* to advance to the Edit Order Item window if you have *Order Maintenance* authority and the Allow Split Order preference is selected; otherwise, the Browse Order Item window opens. See below for a discussion of maintenance options. **Line split?** If the line is split, this icon is available only after you click the plus sign for the requesting system line number to display additional fields and options:  See the *Details tab*, below, for a discussion.
view the updated ship to address associated with the item	Click the display icon ( ) for an item on the *History tab* to advance to the Order History Detail - Address Change Window. See the *History tab*, below, for a discussion.

Option	Procedure
Maintaining an order	**Authority to maintain an order:** You can update an order as described below if you have *Order Maintenance* authority. See the *Role Wizard* for more information. **Maintenance at the order level or at the line level?** If the Allow Split Order preference for an organization is: • *Unselected:* an order's status, and fulfilling location or sourced location, are set at the order level. • *Selected:* an order's status, and fulfilling location or sourced location, are set at the line level. **Note:** **Important:** When you have *Order Maintenance* authority and the Allow Split Order preference is selected, you use the *Edit Order Item* window, rather than the *Order* screen, to maintain an order line's status or sourcing location. **Cannot change both status and sourced location:** You cannot change both the status and any location for an order or an order line at the same time. To change more than one field, first apply one change and click *Save*, then return to the **Order** screen and apply the other change. **Caution:** Updating an order or line's status, fulfilling location, or sourced location is a means to correct occasional issues that may occur, and not recommended for routine processing. Except for the restrictions noted below, the screen does not prohibit most status or location updates. **Note:** Before updating an order, you can use other screens in Order Broker or contact a potential fulfilling, sourced, or pickup location directly to ensure that the update does not produce subsequent issues, such as fulfilling an order twice, reopening a shipped or canceled order, sourcing an order twice, or not fulfilling an order at all.

Option	Procedure
update the status of an order	If you have authority to *Order Maintenance* and the Allow Split Order preference for the organization is unselected, you can update the status of an order: • Select the new status from the *Order Status* field. • Click *Save*. You cannot change the status of an order to *Complete* or *Open*, since these are statuses that Order Broker applies to an order only when the individual lines have different statuses. You can change the status of a canceled order here regardless of whether the *Restrict Reassignment of Canceled Line* preference is selected. **Restrictions:** • When you select a status from the *Order Status* field for a delivery order, the corresponding *fulfilling location* field (*Shipment* or *Sourced*) becomes display-only. Similarly, when you select a status from the *Order Status* field for a ship-for-pickup order, the corresponding *Sourced* location field becomes display-only. In order to change both the order's status and its fulfilling or sourced location, complete one update and then return to the **Order** screen to complete the other update. **Updates:** • When you change the order status to *new_order*, *canceled*, or *fulfilled*, the *Polled Count* for the order lines are reset to *0*. • When you change the order status to *rejected*: – delivery order: The Routing Engine reassigns the order and changes the status to *new_order* if another eligible location exists and if the Search Retries limit hasn't been reached; otherwise, the Routing Engine changes its status to *unfulfillable*. There may be a brief delay before the update is applied. – When you use RICS order fulfillment, changing the order status to rejected also triggers a new fulfillment order request to RICS. See *Order Fulfillment through RICS Integration* for more information. – pickup order: The Routing Engine changes its status to *unfulfillable*. – ship-for-pickup order: The Routing Engine reassigns the order to a different sourcing location, and changes the status to *new_order* if another eligible sourcing location exists and if the Search Retries limit hasn't been reached. For a ship-for-pickup order, a rejected status update generally indicates that the inventory was not received from the sourced location, or that it was defective. There may be a brief delay before the update is applied. A status change can update the reserved quantity for the product location, depending on the system's *Include Reserved* setting and any *Reserved Statuses* for the system. See the *System* page for more information. Order Broker tracks the activity in status history. See the *History tab*, below.

Option	Procedure
	For more information: See *Order and Line Statuses (Splitting Preference Turned Off)* for more information on automatic status updates for orders fulfilled through Store Connect.
update the fulfilling location for a delivery order	If you have authority to *Order Maintenance* and the Allow Split Order preference for the organization is unselected, you can update the fulfilling location for an order: Select the new *fulfilling location* from the field labeled *Shipment* for a *delivery order* and Click *Save*. **Which locations are available for selection?** The dropdown list includes each location that supports the type of order: • For a *delivery order*, the location must be flagged as Delivery Available. You cannot select: • Any location where the order was previously assigned, even if it no longer supports the type of order. • The *IN PROCESS* location. See the *Acknowledge Order Before Brokering* preference for background. **Note:** The window does not prevent you from selecting a location: – where the item(s) are not available. If you do so, and if the Include Reserved flag is selected at the *System* screen, Order Broker creates a new record of the product location(s). – that is not associated with the zone for the order's shipping location if you use *zone fulfillment*. When you use RICS order fulfillment, changing the fulfilling location for a delivery order triggers a release reservation request for the prior location and a new fulfillment order request for the new location to RICS. See *Order Fulfillment through RICS Integration* for more information. **For more information:** See below for *Restrictions*.

Option	Procedure
update the sourcing location for a ship-for-pickup order	If you have authority to *Order Maintenance* and the Allow Split Order preference for the organization is unselected, you can update the fulfilling location for an order: • Select the new *sourcing location*. • Click *Save*. **Which locations are available for selection?** The dropdown list includes each location that is flagged as Ship For Pickup Sourcing Available. • You cannot select: • Any location where the order was previously assigned. • The *IN PROCESS* location. See the *Acknowledge Order Before Brokering* preference for background. **Note:** The window does not prevent you from selecting a location: – where the item(s) are not available. If you do so, and if the Include Reserved flag is selected at the *System* screen, Order Broker creates a new record of the product location(s). – that is not associated with the zone for the order's shipping location if you use *zone fulfillment*. **For more information:** See *Ship For Pickup Order* for background.

Option	Procedure
Restrictions	• You cannot change the fulfilling location for a *pickup order*. • You cannot change the pickup location for a *ship-for-pickup order*. • When you select a location from the *fulfilling location* field (*Shipment*) for a delivery order, the *Order Status* field becomes display-only. In order to change both the order's status and its fulfilling location, complete one update and then return to the **Order** screen to complete the other update. • When you select a status from the *Order Status* field for a ship-for-pickup order, the corresponding *Sourced* location field becomes display-only. In order to change both the order's status and its sourced location, complete one update and then return to the **Order** screen to complete the other update. **Updates:** • If you select the *default unfulfillable location*, the status of the order changes to *unfulfillable*. • Order Broker tracks the location assignment history. See the *History tab*, below. • If the system is configured to track *reserved quantity* and the line is in an applicable status, Order Broker updates the reserved quantity for the product location or creates the product location if it does not already exist. Otherwise, Order Broker does not create or update a product location.
change an order line's status or fulfilling location, and view additional information about an item, including the description, price and tax, and polled count, in a single window	Click the edit/display icon ( ) for an item on the *Details tab* to advance to the *Edit Order Item* window if you have *Order Maintenance* authority and the Allow Split Order preference is selected; otherwise, the *Browse Order Item* window opens. **Line split?** If the line is split, this icon is available only after you click the plus sign for the requesting system line number to display additional fields and options:  See the *Details tab*, below, for a discussion.

Fields at this screen

Fields	Description
Request ID	See *Request ID*.
Order Number	See *Order Number*.
Header tab	
Order Type	See *Order Type*.

Fields	Description
Customer Number	The customer number, if passed as the `customer_no` in the *submit order message*, identifying the customer in the originating system.
Order Date	The transaction date and time passed in the *submit order message*. Might not be the same as the date when the order was created. If no time was specified in the message, the time displayed here indicates midnight (for example, 12:00 AM).
(Field labels vary depending on the type of order)	*Placed* = The location that originated a *delivery order*or *ship-for-pickup order*. *Pickup* = The location a customer selected to pick up a *pickup order* or *ship-for-pickup order*. *Shipment* = The location shipping a *delivery order*. This location might have been specified by the placed (originating) location, or selected by the Routing Engine based on the rules set up at the *Preferences* screen. *Sourced* = The location that transfers the inventory for a *ship-for-pickup order* to the pickup location. This location might have been specified by the placed (originating) location, or selected by the Routing Engine based on the rules set up at the *Preferences* screen. **Multiple locations?** If the Allow Split Order preference is selected, a delivery order can be assigned to multiple locations for fulfillment, and a ship-for-pickup order can be assigned to multiple locations for sourcing. In this case, this field displays the word *Multiple* and information on each assigned location is displayed under the *Details tab*. See *Selecting a Location for a Delivery Order* or *Selecting a Sourcing Location for a Ship-for-Pickup Order* for an overview. **Update?** You can update the fulfilling location for a delivery order, or the sourcing location for a ship-for-pickup order, if the Order Maintenance flag in your user profile is selected and the Allow Split Order preference for an organization is unselected. See *Options at this screen*, above, for more information. **Note:** An integrated system might use different terms for these locations.
Order Status	See *Order and Line Statuses* for possible statuses. **Update?** You can update the order status if the Order Maintenance flag in your user profile is selected and the Allow Split Order preference for an organization is unselected. See *Options at this screen*, above, for more information.

Fields	Description
Under Review	A selected setting indicates that the fulfilling system needs to delay shipping or fulfilling the order until the flag is cleared. **Note:** • It is the responsibility of the integrating systems to prevent fulfillment of an order that is under review. Order Broker does not prevent fulfillment based on this setting. • The items on orders that are under review are still included in the *reserved quantity* calculation. **Updates:** You can select this flag through the initial *submit order message*, and can also update this flag: • through the *OrderUpdate message* • at this screen, if you have Order Maintenance authority The *History tab* displays a record of each time you change the setting of this flag. *Hold under review?* If the order is fulfilled through *Order Fulfillment through RICS Integration* and the *Hold Under Review Orders* flag for the system is selected, the order is submitted for fulfillment when you clear this flag. See *Order Fulfillment through RICS Integration* for background. **Effect of the Under Review indicator in Store Connect:** • The order is still eligible to be accepted and picked • The associate can generate the packing slip and the pick list pull sheet for the order • The order is not eligible for shipping or pickup • When the associate picks a pickup order, no email notification is sent to the customer until the setting of the *Under Review* indicator changes • A delivery order is not eligible to be shipped, and a pickup order is not eligible to be picked up How the associate can tell if an order is under review: • The words *Under Review*, in red, are is displayed next to the order number on Store Connect screens. • The option to ship a delivery order or pick up a pickup order is greyed out.

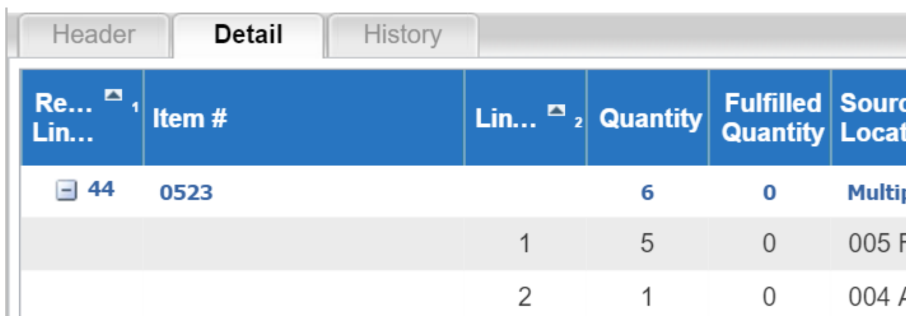
Fields	Description
Sold To	Any of the following information on the customer placing the order, if it is passed in the *submit order message*: • first name, middle initial, last name • company name • first through fourth address lines, including any apartment or suite • city, state, *Postal Code*, and country • first phone number (prefixed by Day:) • second phone number (prefixed by Eve:) • email address **Note:** When submitting a pickup or ship-for-pickup order, Xstore uses the location's address from Order Broker, while Order Management System uses the address from its own Store Cross Reference table. **Customer anonymized?** If the customer data on an order has been *anonymized*, asterisks are displayed for the sold-to information. See *Anonymizing Data* for background.
Ship To	Any of the following information on the customer to receive a *delivery order*, or the address and contact information for the store where a customer picks up a *ship-for-pickup order*. • first name, middle initial, last name • company name • attention line (can be used for the name of the person to alert at the shipping destination) • first through fourth address lines, including any apartment or suite • city, state, *Postal Code*, and country • first phone number (prefixed by Day:) • second phone number (prefixed by Eve:) • email address **Note:**Order Broker does not support a ship-to address for a pickup order. **Customer anonymized?** If the customer data on an order has been *anonymized*, asterisks are displayed for the ship-to information. See *Anonymizing Data* for background. If the address has been updated through the *Edit Ship To Details* window in Store Connect at any store location assigned to ship one or more items on the order, the most recently updated address is displayed here.
Summary	

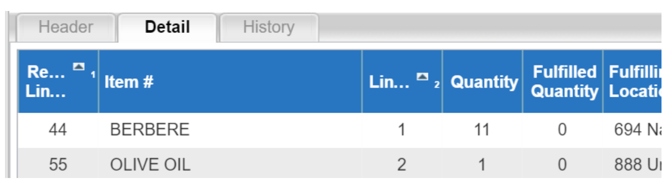
Fields	Description
Currency	The description or ISO 4217 alphabetical code of the currency on the order. From the currency specified in the submit order message. If the currency is a valid alphabetical ISO 4217 code, the related currency symbol can be displayed for all order values. The default is the U.S. dollar (*USD*). **Note:** • The currency code must be all capitals to match the ISO 4217 code. • Not all currency symbols can be displayed on the screen.
Sub Total	The subtotal of merchandise on the order, and preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the amount indicated is 0.
Special Instructions	Any special instructions for handling the order. Integrated systems might use this field to store other information about the order. The instructions can be up to 4000 positions.
Total	The total amount of merchandise, tax, freight, and other charges on the order, preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the amount indicated is 0.
Tax	The total amount of tax on the order, preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the tax indicated is 0.
Ship Via	The ship via code and ship via description designated for the order from the `ship_via` and `ship_via_description`. Formatted as `12 - UPS Ground` where: • `12` is the ship via • `UPS Ground` is the ship via description *Different from carrier description?* The description displayed here is from the SubmitOrder message and saved in the xom_order table, but this description does not update the carrier description displayed at the *Carriers* screen in Modern View. The description from the Carrier record is used elsewhere in the application, including Store Connect screens, Store Connect printed output, and the shipment notification email generated for orders shipped through Store Connect. *If no ship via specified in the SubmitOrder message:* • For a delivery or ship-for-pickup order, the *Default Carrier* specified at the **Preferences** screen is used. • The default *PICKUP* carrier is used for a pickup order. If the default *PICKUP* carrier does not exist, Order Broker creates it.

Fields	Description
Balance Due	The total balance due on the order, preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the amount indicated is 0.
Freight	The total amount of freight on the order, preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the freight indicated is 0.
Gift	Set to Y or N, if passed in the *submit order message*; otherwise, blank.

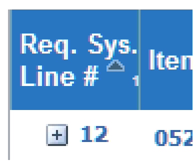
<table>
<tr><th>Fields</th><th>Description</th></tr>
<tr><td>Details tab</td><td>
Is line split? Provided the Allow Split Order preference is selected, a line can split if:

the Allow Split Line preference is selected, and the Routing Engine split a line when initially creating a delivery order, or after the line was rejected by an assigned location; or,
the Allow Partial Updates preference is selected, and the Routing Engine received a status update for a quantity lower than the current line quantity.

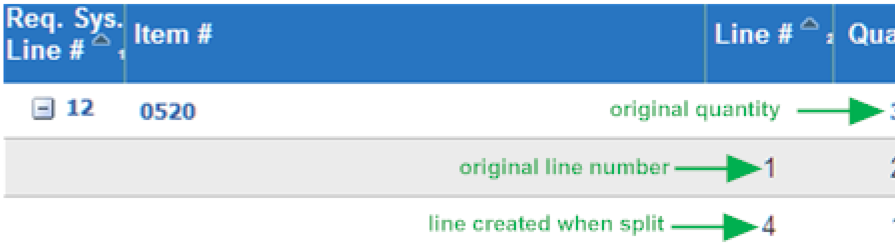
Even if your preferences support splitting lines or partial status update, this does not necessarily mean that the lines on an order will split.
Split lines at Detail tab: If any line on the order is split, you need to expand the requesting system line number at the Details tab in order to see and work with the details for all lines and see additional options:


Non-split lines at Detail tab: If none of the lines on the order are not split, the details and options are displayed when you open the Detail tab:


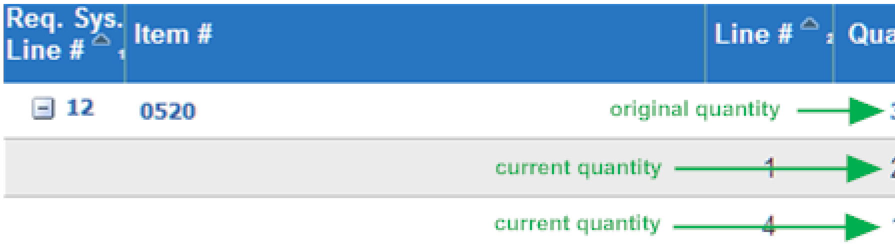
For more information: See Selecting a Location for a Delivery Order for some of the different scenarios that are possible in creating or updating detail lines on delivery orders if you have Order Broker configured to split orders or order lines. Also, see Updating Order Status at the Line or Unit Level for an overview on processing partial status updates for order lines.
</td></tr>
</table>

Fields	Description
Req. Sys. Line # (Requesting system line number)	The line number identifying the order line in the requesting location. From the `line_item_no` passed in the *submit order message*. A single line from the requesting system can create multiple order lines in Order Broker if the Allow Split Line preference is selected. Also, a line can split as the result of a *partial status update* if the Allow Partial Updates preference is selected. Even if a line is not split in Order Broker, the requesting system line number can be different from the line number in Order Broker. For example, this situation can occur if the placed (originating) location sends only the third line on a multi-line order to Order Broker; in this case, the line number in Order Broker is #1. **If split:** If any lines on the order are split, you need to expand the line to see additional details and options. Click the plus sign next to the requesting system line number to expand: 

Line #	The order line number assigned by Order Broker. May be different from the requesting system's line number if the system did not send all of the order lines to Order Broker for fulfillment and the version specified in the *submit order message* was lower than 3.0, or if an order line is split.
	
	If split: If any of the lines on the order are split, the *Item #* is before the Order Broker Line # and is always displayed, even if you have not expanded the line by clicking the plus sign next to the *Req. Sys. Line # (Requesting system line number)*; however, the Line # and other fields are not displayed until you click the plus sign.
	
	Examples of line splitting:
	• Split by the Routing Engine:
	  – The Routing Engine assigns the order to location A, and then Location A rejects the order
	  – The Routing Engine then assigns half the quantity to location B, and half to location C. Result: the quantity in location B is now line #1; the quantity in location C is now line #2
	• Partial status update: The entire quantity of 5 was originally assigned to location A, but location A rejected 3 units. Result: the quantity in location A is now line #1; the rejected quantity, now reassigned or unfulfillable, is now line #2

Fields	Description
	 **Different line numbers even if not split:** It is possible for the Order Broker line number and requesting system line number to differ if, for example, the requesting system sends line 3 of a multi-line order to Order Broker (requesting system line number); when the Routing Engine creates the order, it assigns a line number of 1 because it is the only order line received from the requesting system. **Line numbers might not be consecutive:** If the Routing Engine splits a line or receives a *partial status update*, the line numbers assigned in Order Broker to the resulting split lines might not be consecutive. For example, a system sends 3 lines, which produce lines 1, 2, and 3. Subsequently, the Routing Engine receives a partial update for line 1 and creates line 4 for the quantity in the updated status. **If not split:** If none of the lines on the order are split, just a single line number is displayed.
Item #	The *system product* code for the user's *Default Shipping System*. If the user's *Default Shipping System* is not in the organization associated with the order, the system product code for the fulfilling location is displayed. Up to 26 positions. **If split:** If any of the lines on the order are split, the Item # is before the Order Broker *Line #* and is always displayed, even if you have not expanded the line by clicking the plus sign next to the *Req. Sys. Line # (Requesting system line number)*. **No item #?** If your user ID is not assigned a Default Shipping System at the *User Profile Configuration* screen, the Item # might not be displayed here. **Note:** You can display the item description by moving your cursor over the item code.

Fields	Description
Quantity	**Original quantity:** If the line is split, the quantity displayed on the first line without a current line number is the quantity of the item that was originally assigned to the *Fulfilling Location* or *Sourced Location*. This quantity might differ from the quantity originally submitted to Order Broker if the Allow Split Line preference is selected, and the Routing Engine initially split the line across multiple fulfilling or sourcing locations. Also, the original quantity in Order Broker might subsequently be split across multiple order lines in Order Broker if the original fulfilling or sourcing location rejects the assignment and the Routing Engine splits the line when it reassigns it, or if a location submits a partial status update. **Current quantity:** The quantity that is currently assigned to the fulfilling, sourcing, or pickup location. This quantity might be different from the original quantity if the Allow Split Line preference is selected, and the Routing Engine split the line across multiple fulfilling or sourcing locations after it was initially rejected by the first location, or if a location submits a partial status update. **Not split:** If the line is not split, the original and current quantities are the same. If none of the lines on the order are split, then just a single quantity is displayed.



Fields	Description
Fulfilled Quantity	The quantity of the item shipped to the customer (delivery order) or picked up by the customer pickup order, ship-for-pickup order). Updated when the Routing Engine receives a status update message indicating that the new order, line, or quantity status is *fulfilled*. **If split:** The total fulfilled quantity is displayed at the summary level for the line, and the fulfilled quantity for each current line number is listed below with the current line.

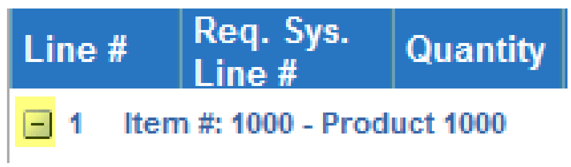
Req. Sys. Line #	Item #	Line #	Quantity	Fulfilled Quantity
11	KABNOSKU		10	10
		1	7	7
		2	3	3

Fields	Description
Fulfilling Location	The *fulfilling location* that was most currently assigned to fulfill the item. Displayed only if the order is not a *ship-for-pickup order*. **If split:** If the line is currently split across multiple fulfilling locations, the word *Multiple* is displayed at the summary level. You can expand the line to review all assigned locations by clicking the plus sign to the left. **Update?** You can update the fulfilling location for a line if the Order Maintenance flag in your user profile is selected and the Allow Split Order preference is selected. See *Edit Order Item* for more information.
Sourced Location	The *sourcing location* that was most currently assigned to source the item for a *ship-for-pickup order* order. **If split:** If the line is currently split across multiple sourcing locations, the word *Multiple* is displayed at the summary level. You can expand the line to review all assigned locations by clicking the plus sign to the left. **Update?** You can update the sourcing location for a line if the Order Maintenance flag in your user profile is selected and the Allow Split Order preference is selected. See *Edit Order Item* for more information.
Pickup Location	The *pickup location* for a *ship-for-pickup order* order.
Line Status	See *Order and Line Statuses*. **Update?** You can update the line status if the Order Maintenance flag in your user profile is selected and the Allow Split Order preference for an organization is selected. If the Allow Partial Updates preference is selected, you can also specify a partial quantity to update with the new status. See *Edit Order Item* for more information.
Status Date	The last date and time when the status of the order changed.
System Products	Click the system products icon ( ) to open the *System Products* window, listing the system products for the item.
Display/Edit	Click the display/edit icon ( ) to open the *Edit Order Item* window if you have *Order Maintenance* authority and the Allow Split Order preference is selected; otherwise, the *Browse Order Item* window opens. These windows list additional information about the item, such as pricing and poll count, and the *Edit Order Item* provides the ability to edit the item's fulfilling location or status.

Fields	Description
History tab	This tab displays the status history for each line on the order, created whenever a line is:

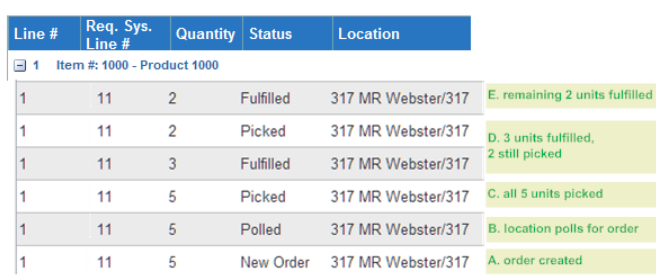
- created, or
- assigned or reassigned to a fulfilling or sourcing location, or
- when its status changes for any other reason, or
- when its shipping address is updated, or
- when there is an update to the *Under Review* indicator
- when the Pickup By Date is assigned, changed, or removed
- when the customer data is anonymized through the Completed Order Private Data Purge job or through the ForgetPrivateData web service request

The *History* tab lists records for each item in reverse chronological order (newest to oldest). A single transaction can create multiple history records if the transaction splits the line due to a partial status update or reassignment of a rejected order to multiple fulfilling locations. Optionally, you can collapse the history for an item by clicking the box next to the line number.



Note:

Status history and changes to the *Under Review* indicator are tracked at the line level even if the organization does not split orders or order lines.



Line #	Req. Sys. Line #	Quantity	Status	Location
1	Item #: 1000 - Product 1000			
1	11	2	Fulfilled	317 MR Webster/317
1	11	2	Picked	317 MR Webster/317
1	11	3	Fulfilled	317 MR Webster/317
1	11	5	Picked	317 MR Webster/317
1	11	5	Polled	317 MR Webster/317
1	11	5	New Order	317 MR Webster/317

Fields	Description
Item #	The *system product* code and item description for the user's *Default Shipping System*. If the user's *Default Shipping System* is not in the organization associated with the order, the system product code and item description for the fulfilling or sourcing location is displayed. Up to 26 positions.
Line #	The current line number at the time the activity took place. This number might differ from the current line number if the Routing Engine split the line after initial creation in Order Broker because the original fulfilling location rejected it. **Which line number?** The status history entry always lists the line number referenced in the status update request, even if the status update creates a new line number. *Example:* Line 10 currently includes 5 units in picked status. A *partial status update* indicates to change the status of 3 units on the line to fulfilled status. This update changes the quantity of line 10 to 2, and creates a new line, line 11, for 3 units in fulfilled status. However, both status history entries list line number 10, since that was the line number referenced in the status update request. The Routing Engine does not write a separate status history record for the creation of line 11. **Under Review update:** An update to the *Under Review* indicator creates a history record for each line on the order. **Pickup By Date update:** An update to the *Pickup By Date* creates a history record.
Requesting System Line Number	The line number identifying the order line in the requesting location. From the `line_item_no` passed in the *submit order message*. A single line from the requesting system can create multiple order lines in Order Broker if the Allow Split Line preference is selected.
Quantity	The order line quantity at the time the activity took place. Might differ from the current quantity if the line was rejected by the original fulfilling or sourcing location and split by the Routing Engine at reassignment, or if the transaction was a *partial status update*.

Fields	Description
Status	The status as a result of the activity indicated. See *Order and Line Statuses*. **Note:** When an order is rejected and it cannot be reassigned and, as a result, the Routing Engine changes its status to unfulfillable, 2 history records are written: 1 for the *rejected* status, and 1 for the *unfulfillable* status. **Under Review update:** An update to the *Under Review* indicator creates a history record using the order-level status, even if the status of an individual line is different; however, this update does not affect the actual status of individual lines. *Example:* An order includes a line in `polled` status and a line in *new order* status, so the status of the order is *open*. You update the *Under Review* indicator for the order. The history record indicates a status of *open* on both lines, although the status of the *polled* and *new order* lines does not change.
Location	The code and description of the *location* where the change occurred, or which requested the status change. **Under Review update:** An update to the *Under Review* indicator creates a history record using the current fulfilling location for the order, regardless of the location that submitted the update. **Locations for ship-for-pickup order:** The location listed when a ship-for-pickup order is intransit (and then immediately to intransit polled) is the sourcing location, while the location listed when a ship-for-pickup order is received or fulfilled is the pickup location. If the pickup location receives a partial quantity, splitting the order line, the pickup location is listed for the received quantity and the quantity that is still in transit. See *Ship For Pickup Order* for background. **Location for auto-cancellation:** The location listed when the order line is automatically canceled because the customer did not pick up the order is the pickup location.
Date/Time	The date and the time when the activity occurred, such as the status changed; see *Require Status Update for Assigned Orders?* for a discussion.

Fields	Description

User	Indicates the user who performed the activity, such as creating the order or updating the status of the order or line:
	• creation: the `employee_id` from the the *submit order message*
	• change: depending on how the change was made:
	  – *status update* message or *OrderUpdate message*: the `employee_id`
	  – order maintenance: the user ID of the person who updated the order
	  – automatically changing a *Store Connect* order to polled after assignment: `Admin`
	  – Store Connect activity: the name of the *store associate user*
	  – putting the line in *polled* status through a *fulfillments message*, or in *intransit polled* status through an *intransit message*: `SYSTEM`. The status change takes place only if the system's Require Status Update flag is not selected.
	  – anonymizing the customer data through the *Completed Order Private Data Purge* job or through the ForgetPrivateData web service request: `SYSTEM`.
	Note:
	• The employee ID specified in an inbound message might not be a valid user ID in Order Broker.
	• The user ID is truncated if it exceeds 10 positions.

Source	Indicates how the order was created or updated:
	• *WS:*
	  – an XML message (such as the *submit order message*, *status update* message, or *OrderUpdate message*, or polling of an order through the *fulfillments message* or the *intransit message*), or
	  – any *Store Connect* activity, including automatically changing a newly-assigned order to polled, or activity by a *store associate user* through a *Store Connect* screen
	  – anonymizing the customer data through the *Completed Order Private Data Purge* job or through the ForgetPrivateData web service request
	• *UI:* a user made the change at the *Order* screen

Fields	Description
Transaction Notes	Possible transaction notes from the xom_status_history table: • Address Change Applied: Click the details icon ( ) to advance to the *Order History Detail - Address Change Window* where you can review the old and new ship to address. • Accepted Status Update Restricted (where Accepted is the status specified in the order status update request message: An order status update request message indicated a status change for a canceled line, but the *Restrict Reassignment of Canceled Line* preference was selected. A similar message is also written if the order line status was Fulfilled. You can use the Status Restricted Report to review order lines whose status updates were restricted through the Order Status Update request message. **Note:** Even if the status update was restricted, if the order status update request indicated shipping details such as the shipper or tracking number, this information is also displayed in the Transaction Notes, although the shipping information is not saved elsewhere in the database. • Auto-canceled: auto-cancel reason: Indicates the auto-cancel reason code used by the *auto-cancel unclaimed orders job* to cancel an unclaimed pickup order line. • Carrier: The carrier (shipping agent), if any, passed in the *status update* message from the assigned fulfilling location, or specified through *Store Connect*. • Carton #: The carton number, if any, passed in the *status update* message from the placed (originating) location when it changes the order or line status of a ship for pickup order to *Intransit*, or when the status is set to *Fulfilled*. • Note: The status reason note, if any, passed in the *status update* message. • Pickup By Date: Indicates the *Pickup By Date* assigned, either automatically when the order is eligible for pickup, or when the existing date is changed by a user or web service update. • Pickup By Date Removed: Indicates that the *Pickup By Date* has been removed due to a status change, such as when the line is fulfilled. rejected, or canceled. • Posted to RICS: The order was submitted to RICS if you use *Order Fulfillment through RICS Integration*. • Private Data Anonymized: The order has been anonymized, either through the *Completed Order*

Fields	Description

	Private Data Purge job, or through the ForgetPrivateData web service request.
	• Reason Code: The status reason code, if any, passed in the *status update* message.
	• Reason description: The description of the cancellation reason selected when an associate canceled the line in Store Connect.
	• Reject - reason description: The description of the reject reason selected when an associate rejected the line in Store Connect.
	• RICS Release Reservation Message Sent: Order Broker: A message was posted to RICS to release the reservation for an order because it has been canceled or rejected. Occurs if you use *Order Fulfillment through RICS Integration*.
	• [Status] Status Update Restricted. Requested by Location [Loc]:
	  – A status update request message attempted to change the status of an order or line in canceled status, but the *Restrict Reassignment of Canceled Line* preference was selected. The requested status and requesting location are indicated in the history message. See the related preference for a discussion.
	  – A status update request message attempted to change the status of an order or line in fulfilled status. Changing the status of a fulfilled order or line is supported only through the Order screen or the Edit Order Item window, but not through the status update request message. However, if the request message specified a shipper and/or tracking number, this information is displayed here.
	• Tracking #: The tracking number, if any, passed in the *status update* message from the assigned fulfilling location, or specified through *Store Connect*.
	• Unable to create RICS message: There was an unrecoverable error in the information to be submitted through RICS, such as alphabetical characters in a numeric field. Occurs if you use *Order Fulfillment through RICS Integration*.
	• Under Review: The current setting of the *Under Review* indicator, indicating:
	  – Yes = the fulfilling system needs to delay shipping or fulfilling the order until the flag is cleared
	  – No = the order is eligible for fulfillment
	  If an open order was submitted through the RICS integration and the setting of the Under Review flag changes, the message for an order line assigned to a RICS location indicates: Under Review: No; RICS Under Review Message Sent, where No is the new setting of the Under Review flag.

Fields	Description
	Science Engine responses: If you use weighted brokering, responses from the Science Engine can produce the following Transaction Notes: • Exceed Maximum Number of Splits: The Science Engine returned a code indicating that the entire order could not be fulfilled without exceeding the Maximum Order Splits, so the entire order is unfulfillable. This response can occur for a single-line order that could have been fulfilled by splitting the line, but split line is not enabled. A reason code of 1000 is stored as the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table. • Not Enough Inventory and No Backorder Location: The Science Engine returned a code indicating that the entire order, or a line on the order, could not be fulfilled because there was not sufficient inventory on-hand, and there was not an eligible location that supported backorders. A reason code of 2000 is stored as the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table if the entire order was unfulfillable, and a reason code of 3000 is stored for an individual line that was unfulfillable while other line(s) could be fulfilled. • Not Fulfilled due to Split Not Allowed: The Science Engine returned a code indicating that the entire order could not be fulfilled without splitting one or more order lines, and Allow Split Line was not selected. The same message is displayed if the order could not be fulfilled without splitting the order, and Allow Split Order was not selected. A reason code of 7000 is stored as the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table if the entire order was unfulfillable, and a reason code of 6000 is stored for an individual line that was unfulfillable while other line(s) could be fulfilled. *Additional Science Engine reason codes:* The following reason codes are stored in the UNFULFILLABLE_REASON_CODE in the XOM_STATUS_HISTORY table, but no Transaction Notes are displayed, based on responses from the Science Engine: • 4000: An order or line had to be assigned to a backorder location that was currently without sufficient inventory, because the entire order could not be assigned to locations with sufficient inventory without exceeding the Maximum Order Splits. For example, an order includes a line for 1 unit of item A, and another line for 2 units of item B. Location 100 can fulfill the line for item A. Locations 200 and 300 each have 1 unit item B. The Maximum Order Splits is set to 2. If location 200 supports backorders, the line with 2 units of item B is assigned there.

Fields	Description
	• 5000: An order or line had to be assigned to a backorder location that was currently without sufficient inventory, because there were no locations that had the inventory on-hand; however, this was not the result of the *Maximum Order Splits* setting being exceeded. • 8000: An order or line could have been assigned to locations with inventory if split order or line were allowed; but since the order or line could not be split, it was assigned to a backorder location that was currently without sufficient inventory. **About status reason codes and notes:** The assigned fulfilling or sourcing location might pass a status code or note, or both, indicating why it rejects an order or line; or a location might pass a status code or note, or both, indicating why to cancel an order or line. **About rejection and cancellation reason codes:** Defined through the *Reason Codes* screen in Modern View, and available for the store associate to use when rejecting or canceling an order or item if the code is flagged as Active. **Multiple lines:** The Transaction Notes can run to more than one line if multiple types of information need to be displayed. For example, if the status update request included a carrier, tracking number, carton number, and Pickup By Date assignment, the first line includes the carrier, tracking number, and carton number, and the second line indicates the Pickup By Date. **Contents too long?** If the contents of any one line are too long for the allotted space, an ellipsis (...) indicates that there is more content. This might occur if, for example, the reason notes are too long to be displayed. However, you can drag the Transaction Notes field to the right at the column heading to lengthen the displayed information.
Details	If the ship to address changed, click the details icon ( ) to advance to the *Order History Detail - Address Change Window* where you can review the details of a shipping address change, including the address before and after the change.

Fields	Description
RICS Log tab	This tab displays the history for each communication between Order Broker and Oracle Retail Integration Cloud Service (RICS). This tab is displayed only if the Online flag is selected at the *RICS Integration tab* of the **System** screen for at least one system in the organization. These records are stored in the RICS_LOG table in the database. The *daily cleanup job* automatically deletes these records based on the number of days specified in the RICS Log History field at the *Tenant-Admin* screen; however, if the record has a Retry Status of *Failed* it is not eligible to be purged. **For more information:** See *Order Fulfillment through RICS Integration* for background and more information.
Date/Time	The date and time when the message activity took place.
Retry Status	Possible statuses are: • *Failed* = The message failed to be sent to RICS, typically through some sort of communication failure. In the case of an outbound message, RICS log records with a Retry Status of *Failed* are not eligible to be purged. Instead, a cleanup job attempts to re-send these messages every hour, in case RICS was temporarily down when they were initially sent. Messages are sent in first-in first-out (oldest first) order. • *Reprocessed* = Order Broker re-sent the outbound message to RICS. • *Success*: – The message was successfully sent or received, or, – The message failed due to invalid data, such as an alphabetical character in a numeric field; in this case, the message is not eligible to be re-sent and the RICS log entry is eligible for purge.
Location	The code and description of the fulfilling location for the order.
Response Code	The response code identified for the success or failure. Possible response codes include: • Success = The message was successfully posted to RICS. • 303 = Might indicate a connection problem. • 500 = Might indicate that the URL was incorrect or temporarily unavailable. • 502 = Might indicate that the connection timed out.

Fields	Description
Message Type	The type of message: • *Create Fulfillment Order:* The order or line was posted to RICS for fulfillment in a warehouse or store location. • *Release Order Reservation:* The order or line was canceled or rejected, or reassigned to a different location for fulfillment, so inventory can be be released for other orders. • *Status Update:* The status of the order or line has changed. • *Send Under Review:* The setting of the Under Review flag for an open order that was previously submitted as changed.
Request	Click the display icon ( ) to display the request message in the *RICS Log Message* window.
Response	Click the display icon ( ) to display the response message in the *RICS Log Message* window.

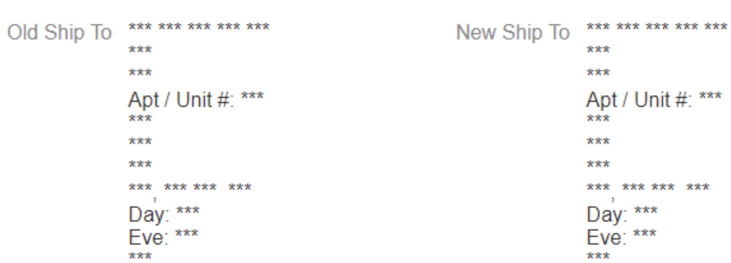
Order History Detail - Address Change Window

Purpose: Use the **Order History Detail - Address Change** window to review the changes made to the shipping address on a delivery order. The old ship to address is on the left side of the window and the new updated ship to address is on the right side of the window with the changes indicated in red for comparison.

Used for the Store Connect module.

Submitting address changes: A store associate with authority to edit the shipping address can update the address in Store Connect.

Customer name anonymized? If the customer data on an order has been *anonymized* (deleted and replaced with asterisks), the customer name is displayed as:



See *Anonymizing Data* for background.

How to display this window: Select the icon ( ) in the *Details* column at the *History tab* of the *Order* screen. This icon is displayed only if a store associate updated the shipping address on a delivery order in Store Connect.

Fields at this window

Field	Description
User	The user ID of the person who performed the activity.
Date / Time	The date and time when the shipping address change was received. Format is based on the settings at the *User Profile Configuration* screen.
Old Ship To	The ship-to name and address before applying the change. Includes: • name: prefix (such as Mr. or Dr.), first name, middle name, last name, and suffix (such as Jr. or Esq.) • company name • first address line • apartment, unit, or suite number (prefixed by the label Apt / Unit #:) • address line 2 • address line 3 • address line 4 • city, state, postal or zip code, country code • daytime phone number (prefixed by the label Day:) • evening phone number (prefixed by the label Eve:) • email address **Note:** Not all of the information above might be available for each customer. Also, the Attention field, if any, is not displayed. **Customer anonymized?** If the customer data on an order has been *anonymized*, asterisks are displayed for the ship-to information. See *Anonymizing Data* for background.
New Ship To	The ship-to name and address with the changes indicated in red. Includes the same name and address fields as the Old Ship To. **Note:** The system does not flag changes in case; for example, updating the country from `US` to `us`, in red. **Customer anonymized?** If the customer data on an order has been *anonymized*, asterisks are displayed for the ship-to information. See *Anonymizing Data* for background.

System Products

Purpose: Use the **System Products** window to review the existing *system product*s for an item on an order.

Used for the Routing Engine module.

How to display this window: Available if Use Routing Engine is selected at the *Tenant* screen. Click the system product icon ( ) next to an item on the *Details tab* of the *Order* screen.

All fields at this window are display-only.

Field	Description
Organization	The *organization* associated with the order. The code and name are separated by a hyphen (-).
Product	The *product* on the order line. The code and name are separated by a hyphen (-).
System	See *system*.
System Product	See *system product*.
Master Style	See *master style*.

Browse Order Item

Purpose: Use the **Browse Order Item** window to view the details and activity of an order line.

Used for the Routing Engine module.

How to display this window: Click the display icon ( ) for an item at the *Details tab* of the *Order* screen.

Note:

Available if Use Routing Engine is selected at the *Tenant* screen. If you have *Order Maintenance* authority and the Use Split Order preference is selected, you advance instead to the *Edit Order Item* window.

All fields on this window are display-only.

Fields	Description
Order Number	See *Order Number*.
Requesting System Line Number	The line number identifying the order line in the requesting location. From the `line_item_no` passed in the *submit order message*. A single line from the requesting system can create multiple order lines in Order Broker if the Allow Split Line preference is selected.

Fields	Description

Line #	The line number of the item on the order in Order Broker.
	How might the line numbers be different? It is possible for the line number, requesting system line number, and original line number to differ; for example:
	• Split by the Routing Engine:
	  – The Routing Engine assigns the order to location A, and then Location A rejects the order
	  – The Routing Engine assigns half the quantity to location B, and half to location C. Result: the quantity in location B is now line #1; the quantity in location C is now line # 2
	• Partial status update: The entire quantity of 5 was originally assigned to location A, but location A rejected 3 units. Result: the quantity in location A is now line #1; the rejected quantity, now reassigned or unfulfillable, is now line #2
	Different line numbers even if not split: It is possible for the Order Broker line number and requesting system line number to differ if, for example, the requesting system sends line 20 of a multi-line order to Order Broker (Requesting system line number); when the Routing Engine creates the order, it assigns a line number of 1 because it is the only order line received from the requesting system.
	Line numbers might not be consecutive: If the Routing Engine splits a line or receives a *partial status update*, the line numbers assigned in Order Broker to the split lines might not be consecutive. For example, a system sends 3 lines, which produce lines 1, 2, and 3. Subsequently, the Routing Engine receives a partial update for line 1 and creates line 4 for the quantity in the updated status.

Original Line #	The line number from which this line was split. Set to 0 if the line was not split after initial order creation.
Item #	The *system product* code for the user's *Default Shipping System*. If the user's *Default Shipping System* is not in the organization associated with the order, the system product code for the fulfilling or sourcing location is displayed. Up to 26 positions. Display-only. **No item #?** If your user ID is not assigned a Default Shipping System at the *User Profile Configuration* screen, the Item # might not be displayed here.
Item Description	The name of the product.

Fields	Description
Line Status	See *Order and Line Statuses* for a listing of possible statuses.
(Field label varies depending on the type of order)	*Sourced* = The location that transfers the inventory for a ship-for-pickup order to the pickup location. *Pickup* = The location that the customer selected to pick up the ship-for-pickup order. *Fulfilling* = Specified for the following types of orders: • Delivery order: The location that ships the order to the customer. This location might have been specified by the placed (originating) location, or selected by the Routing Engine based on the rules set up at the *Preferences* screen. • Pickup order: The location that the customer selected to pick up the order. **Note:** An integrated system might use the term “fulfilling location” differently.
Pickup By Date	The last date when the customer can pick up a pickup or ship-for-pickup order line before the line is automatically canceled by the Auto Cancel Unclaimed Pickup Orders job. The Pickup By Date is assigned automatically when the order line is first eligible for pickup, based on the settings at the Fulfillments tab of the **Preferences** screen, but the date can be overridden through a web service message or at a screen. This field is displayed only for a pickup or ship-for-pickup order, and only if the auto-cancel option is enabled, based on the settings at the **Preferences** screen. Even if displayed, the field is blank if the order line is not ready for pickup. See *Auto-Cancel Unclaimed Orders* for background and more information.
Quantity	The quantity that is currently assigned to the fulfilling, sourcing, or pickup location. This quantity might be different from the Original quantity if: • the Allow Split Line preference is selected, and the Routing Engine split the line across multiple fulfilling or sourcing locations after it was initially rejected by the first location, or • the Allow Partial Update preference is selected, and the Routing Engine split the line because a location processed a *partial status update*.
Original Quantity	The quantity of the item that was originally assigned to the fulfilling or sourcing location. See the Quantity field, above, for a discussion.

Fields	Description
Fulfilled Quantity	The quantity of the item shipped to the customer (*delivery order*) or picked up by the customer *pickup order*, *ship-for-pickup order*). Updated when the Routing Engine receives a *status update* message indicating that the new item status is *fulfilled*.
Price	The amount the customer paid for the item, preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the amount indicated is 0.
Tax	The total tax amount for this order line, as passed in the SubmitOrder message. Preceded by the symbol of the currency on the order. **Prorating tax for split lines:** If a line splits, the tax amount is prorated across the split lines. This prorating can result in a rounding discrepancies of a few pennies. *Example:* The total tax amount for 3 units is $1.00. If the line is split across 3 locations, the tax amount for each location is $.33, resulting in a rounding discrepancy of a cent. **Multiple tax amounts?** If multiple tax amounts are included (for example, GST and PST), the total tax amount is saved in the xom_item table and displayed here.
Ext. Price	The price of the item times the current quantity, preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the amount indicated is 0.
Status Date	The last date and time when the status of the order changed.

Fields	Description
Polled Count	Indicates the number of times the fulfilling or sourced location has sent a *fulfillments message* for information on assigned delivery orders, or the pickup location has sent an *intransit message* for information on assigned ship-for-pickup orders, and the Routing Engine has responded with a message that included this order line. *Polled status updates:* This counter is used only if the requesting location's system has the Require Status Update flag at the *System* screen selected; otherwise, the Routing Engine sets the poll count to 1 when it receives the fulfillment request message, and sets the status to *polled*. See *Require Status Update for Assigned Orders?* for a discussion. *Resetting the polled count:* Changing the status of an order or order line to *new_order*, *canceled*, or *fulfilled* resets the polled count to *0*. *Intransit status updates for ship-for-pickup orders:* When the sourcing location updates the status of a ship-for-pickup line to intransit, the Polled Count is set to 0. Then when the assigned pickup location sends an *intransit message*, the Polled Count is reset to 1. This counter is used for ship-for-pickup orders if the Require Status Update flag for the system is selected. Resetting the polled count: Changing the status of an order or order line to *new_order*, *canceled*, or *fulfilled* resets the polled count to *0*.

Edit Order Item

Purpose: Use the **Edit Order Item** window to view the details and activity of an item on an order, or update the item's status, or fulfilling or sourcing location.

Used for the Routing Engine module.

How to display this window: Click the edit icon ( ) for an item at the *Details tab* of the *Order* screen.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. You advance to this window only if you have *Order Maintenance* authority and the Use Split Order preference is selected; otherwise, you advance to the *Browse Order Item* window.

Options at this window

Option	Procedure

update the status of an order line	• Select the new status from the *Line Status* field for each line you want to change. If the Allow Partial Updates preference is selected, the *Quantity* field becomes enterable.
	• Optionally, enter a different quantity to process a *partial status update*.
	• Click *Save*.
	
	Note:
	You can change the status of a canceled line here regardless of whether the *Restrict Reassignment of Canceled Line* preference is selected.
	
	Status change restrictions:
	• You cannot change the status of a fulfilled line on a *ship-for-pickup order* to rejected; instead, you can change the sourcing location if the status was incorrectly set to fulfilled.
	• When you select a status from the *Line Status* field for a delivery order, the *fulfilling location* field for that line becomes display-only. Similarly, when you select a status from the *Line Status* field for a ship-for-pickup order, the *sourcing location* field for that line becomes display-only. In order to change both the line's status and its fulfilling or sourcing location, complete 1 update and then return to the Order screen to complete the other update.
	• If the Allow Partial Updates preference is selected and you change the *Quantity*, you cannot enter a quantity of zero or a number that exceeds the current quantity; also, you cannot change a partial quantity to *polled* or *new_order* status.
	• You cannot change the status of a full or partial order line to *open* or *complete*, since these are system-assigned statuses.
	Updates:
	• When you change the line status to *new_order*, *canceled*, or *fulfilled*, the *Polled Count* for the order line is reset to *0*.
	• When you change the line or quantity status to *rejected*:
	  – delivery order: The Routing Engine reassigns the line or quantity and changes the status to *new_order* if another eligible location exists and if the Search Retries limit hasn't been reached; otherwise, the Routing Engine changes its status to *unfulfillable*. There may be a brief delay before the update is applied.
	  When you use RICS order fulfillment, rejecting a line on a delivery order triggers a release reservation request for the prior location and a new fulfillment order request for the new location to RICS. See *Order Fulfillment through RICS Integration* for more information.
	  – pickup order: The Routing Engine changes the status to *unfulfillable*.
	  – ship-for-pickup order: The Routing Engine reassigns the line or quantity to a different sourcing location, and

Option	Procedure
	changes the status to *new_order* if another eligible sourcing location exists and if the Search Retries limit hasn't been reached. For a ship-for-pickup order, a rejected status update generally indicates that the inventory was not received from the sourced location, or that it was defective. There may be a brief delay before the update is applied. • If *Auto-Cancel Unclaimed Orders* is enabled, a status change on a ship-for-pickup order or pickup order can update the *Pickup By Date* based on the related settings from the *Fulfillment* tab of the *Preferences* screen; for example, changing the status from picked to canceled, rejected, or fulfilled clears the *Pickup By Date*. See *Auto-Cancel Unclaimed Orders* for more information on the rules that control setting the *Pickup By Date* when you have auto-cancel configured. • A status change can update the reserved quantity for the product location, depending on the setting of the *Include Reserved* flag for the system and any *Reserved Statuses* for the system. See the *System* screen for more information. • Order Broker decreases the quantity of the current line and creates a new order line in the specified status if you process a *partial status update*. • Order Broker tracks the status history. See the *History tab*. • The status of the order might also change, depending on its current status. See *order status*. **For more information:** See *Order and Line Statuses (Splitting Preference Turned On)* for more information on automatic status updates for orders fulfilled through Store Connect.

Option	Procedure
update the shipment or sourced location for an item on a delivery or pickup order	• Select the new *fulfilling location*. • Click *Save*. **Which locations are available for selection?** The dropdown list includes each location that supports the type of order: • For a *delivery order*, the location must be flagged as Delivery Available. You cannot select: • Any location where the line was previously assigned, even if it no longer supports the type of order. • The *IN PROCESS* location. See the *Acknowledge Order Before Brokering* preference for background. **Note:** The window does not prevent you from selecting a location: • where the item is not available. If you do so, and if the Include Reserved flag is selected at the *System* screen, Order Broker creates a new record of the product location. • that is not associated with the zone for the order's shipping location if you use *zone fulfillment*. **Restrictions:** • You cannot change the fulfilling location for a *pickup order*. • When you select a location from the *fulfilling location* field for a delivery order, the *Line Status* field becomes display-only. In order to change both the line's status and its fulfilling location, complete one update and then return to the *Order* screen and select the Edit icon again to complete the other update. **Updates:** • If you select the *default unfulfillable location*, the status of the order changes to *unfulfillable*. • Order Broker tracks the location assignment history. See the *History tab*. • If the system is configured to track *reserved quantity* and the line is in an applicable status, Order Broker updates the reserved quantity for the product location or creates the product location if it does not already exist. Otherwise, Order Broker does not create or update a product location. When you use RICS order fulfillment, changing the fulfilling location for a line on a delivery order triggers a release reservation request for the prior location and a new fulfillment order request for the new location to RICS. See *Order Fulfillment through RICS Integration* for more information.

Option	Procedure
update the sourced location for a ship-for-pickup order	• Select the new *sourcing location*. • Click *Save*. **Which locations are available for selection?** The dropdown list includes each location that is flagged as Ship For Pickup Sourcing Available. You cannot select: • Any location where the line was previously assigned. • The *IN PROCESS* location. See the *Acknowledge Order Before Brokering* preference for background. When you select a new sourcing location, the *Line Status* field becomes display-only. In order to change both the line's status and its sourcing location, complete one update and then return to the *Order* screen and select the Edit icon again to complete the other update. **Note:** The window does not prevent you from selecting a location: • where the item(s) are not available. If you do so, and if the Include Reserved flag is selected at the *System* screen, Order Broker creates a new record of the product location(s). • that is not associated with the zone for the order's shipping location if you use *zone fulfillment*.
update the Pickup By Date for a pickup or ship-for-pickup order	• Enter the new *Pickup By Date*. • Click *Save*. This option is available only if the *Auto-Cancel Unclaimed Orders* option is enabled, and the order line is in a status indicating that it is ready for pickup: • *Picked*, if the order type is pickup, or if the order type is ship-for-pickup and the sourcing location is the same as the pickup location; otherwise, • *Received*, if the order type is ship-for-pickup, and the sourcing location is different from the pickup location. In this situation, the line is not eligible for pickup until the sourcing location has transferred the inventory to the pickup location, and the pickup location has received it. In this case, the *Pickup By Date* is required, and must be in the future. For a pickup order assigned to a Store Connect location, a new *Pickup Ready Reminder to Customer (Pickup Order)* email is generated, indicating the new *Pickup By Date*.

Fields at this window

Fields	Description
Order Number	See *Order Number*. Display-only.
Requesting System Line Number	The line number identifying the order line in the requesting location. From the `line_item_no` passed in the *submit order message*. A single line from the requesting system can create multiple order lines in Order Broker if the Allow Split Line preference is selected. Display-only.

Fields	Description

Line #	The line number of the item on the order in Order Broker. Display-only.
	How might the line numbers be different? It is possible for the line number, requesting system line number, and original line number to differ; for example:
	• Split by the Routing Engine:
	  – The Routing Engine assigns the order to location A, and then Location A rejects the order
	  – The Routing Engine assigns half the quantity to location B, and half to location C. Result: the quantity in location B is now line #1; the quantity in location C is now line # 2
	• Partial status update: The entire quantity of 5 was originally assigned to location A, but location A rejected 3 units. Result: the quantity in location A is now line #1; the rejected quantity, now reassigned or unfulfillable, is now line #2
	Different line numbers even if not split: It is possible for the Order Broker line number and requesting system line number to differ if, for example, the requesting system sends line 20 of a multi-line order to Order Broker (Requesting system line number); when the Routing Engine creates the order, it assigns a line number of 1 because it is the only order line received from the requesting system.
	Line numbers might not be consecutive: If the Routing Engine splits a line or receives a *partial status update*, the line numbers assigned in Order Broker to the split lines might not be consecutive. For example, a system sends 3 lines, which produce lines 1, 2, and 3. Subsequently, the Routing Engine receives a partial update for line 1 and creates line 4 for the quantity in the updated status.

Original Line #	The line number in Order Broker from which this line was split. Set to 0 if the line was not split after initial order creation. Display-only.
Item #	The *system product* code for the user's *Default Shipping System*. If the user's *Default Shipping System* is not in the organization associated with the order, the system product code for the fulfilling or sourcing location is displayed. Up to 26 positions. Display-only. **No item #?** If your user ID is not assigned a Default Shipping System at the *User Profile Configuration* screen, the Item # might not be displayed here.
Item Description	The name of the product. Display-only.

Fields	Description
Line Status	See *Order and Line Statuses* for a listing of possible statuses, and see *update the status of an order line*, above, for instructions on updating a status, including information on processing a *partial status update* if the Allow Partial Updates preference is selected.
(Field label varies depending on the type of order)	*Shipment* = The location that ships a *delivery order* to the customer. This location might have been specified by the placed (originating) location, or selected by the Routing Engine based on the rules set up at the *Preferences* screen. *Pickup* = The location a customer selected to pick up a *pickup order*. In this case, the field is display-only. *Sourced* = The location that transfers the inventory for a *ship-for-pickup order* to the pickup location. The sourcing location might have been specified by the placed (originating) location, or selected by the Routing Engine based on the rules set up at the *Preferences* screen. See *update the shipment or sourced location for an item on a delivery order* or *update the sourced location for a ship-for-pickup order* above for instructions on updating the assigned location. **Note:** If the location previously supported this order type and is now flagged at the *Preferences* screen to no longer support it, no location is displayed here.

Fields	Description
Pickup By Date	The last date when the customer can pick up a pickup or ship-for-pickup order line before the line is automatically canceled by the Auto Cancel Unclaimed Pickup Orders job. The Pickup By Date is assigned automatically when the order line is first eligible for pickup, based on the settings at the *Fulfillments* tab of the Preferences screen, but the date can be overridden through a web service message or at a screen. This field is available only if the Auto-Cancel Unclaimed Orders option is enabled, and the order line is in a status indicating that it is ready for pickup: • *Picked*, if the order type is pickup, or if the order type is ship-for-pickup and the sourcing location is the same as the pickup location; otherwise, *Received*, if the order type is ship-for-pickup, and the sourcing location is different from the pickup location. In this situation, the line is not eligible for pickup until the sourcing location has transferred the inventory to the pickup location, and the pickup location has received it. In this case, the *Pickup By Date* is required, and must be in the future. For a pickup order assigned to a Store Connect location, a new Pickup Ready Reminder to Customer (Pickup Order) email is generated, indicating the new *Pickup By Date*. See Auto-Cancel Unclaimed Orders for background and more information.
Quantity	The quantity that is currently assigned to the fulfilling, pickup, or sourcing location. This quantity might be different from the Original quantity if: • the Allow Split Line preference is selected, and the Routing Engine split the line across multiple locations after it was initially rejected by the first location, or • the Allow Partial Update preference is selected, and the Routing Engine split the line because a location processed a partial status update. This field is enterable if the Allow Partial Updates preference is selected and you specify a different *Line Status*. In this case, you can apply the new status to the entire line quantity, or process a partial status update. See *update the status of an order line*, above, for instructions.
Original Quantity	The quantity of the item that was originally assigned to the fulfilling, sourcing, or pickup location. See the Quantity field, above, for a discussion. Display-only.

Fields	Description
Fulfilled Quantity	The quantity of the item shipped to the customer (*delivery order*) or picked up by the customer (*pickup order* or *ship-for-pickup order*). Updated when the Routing Engine receives a *status update* message indicating that the new item status is *fulfilled*. Display-only.
Price	The amount the customer paid for the item, preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the amount indicated is 0. Display-only.
Tax	The total tax amount for this order line, as passed in the SubmitOrder message. Preceded by the symbol of the currency on the order. Display-only. **Prorating tax for split lines:** If a line splits, the tax amount is prorated across the split lines. This prorating can result in a rounding discrepancies of a few pennies. *Example:* The total tax amount for 3 units is $1.00. If the line is split across 3 locations, the tax amount for each location is $.33, resulting in a rounding discrepancy of a cent. **Multiple tax amounts?** If multiple tax amounts are included (for example, GST and PST), the total tax amount is saved in the xom_item table and displayed here.
Ext. Price	The price of the item times the current quantity, preceded by the symbol of the currency on the order. The screen displays a 2-position decimal, although the database stores 4 positions. If no amount was passed from the originating system, the amount indicated is 0. Display-only.
Status Date	The last date and time when the status of the order changed. Display-only.

Fields	Description
Polled Count	Indicates the number of times the fulfilling or sourced location has sent a *fulfillments message* for information on assigned delivery orders, or the pickup location has sent an *intransit message* for information on assigned ship-for-pickup orders, and the Routing Engine has responded with a message that included this order line. *Polled status updates:* This counter is used only if the requesting location's system has the Require Status Update flag at the *System* screen selected; otherwise, the Routing Engine sets the poll count to 1 when it receives the fulfillment request message, and sets the status to *polled* . See *Require Status Update for Assigned Orders?* for a discussion. Resetting the polled count: Changing the status of an order or order line to *new_order*, *canceled*, or *fulfilled* resets the polled count to *0*. *Intransit status updates for ship-for-pickup orders:* When the sourcing location updates the status of a ship-for-pickup line to intransit, the Polled Count is set to 0. Then when the assigned pickup location sends an *intransit message*, the Polled Count is reset to 1. This counter is used for ship-for-pickup orders if the Require Status Update flag is selected for the system. Resetting the polled count: Changing the status of an order or order line to *new_order*, *canceled*, or *fulfilled* resets the polled count to *0*.

RICS Log Message

Purpose: Use the **RICS Log Message** window to view a request or response message for an order fulfilled through the *Order Fulfillment through RICS Integration*.

Used for the Routing Engine module.

How to display this window: Click the display icon ( ) in the *Request* or *Response* column for an entry at the *RICS Log tab* of the *Order* screen.

> **Note:**
>
> Available if the Active flag is selected at the *RICS Integration tab* of the *System* screen, and there are any RICS log records that have not been purged.

Optionally, you can copy the message from this window so you can paste it into a text editor for troubleshooting or research purposes.

For more information: See *Order Fulfillment through RICS Integration* for background.

Purchase Order Inquiry

Purpose: Use the **Purchase Order Inquiry** screen to search for and review purchase orders assigned to your vendors for fulfillment.

Used for the Supplier Direct Fulfillment module.

Customer or vendor name anonymized? If the vendor or customer data on a purchase order has been anonymized (deleted and replaced with asterisks), the name is displayed as:

*** ***

***

If the vendor data has been anonymized, searching by vendor name is not supported.

A purchase order is eligible to be anonymized only if it is no longer open, and a vendor is eligible to be anonymized only if there are no open purchase orders for the vendor.

See *Anonymizing Data* for background.

How to display this screen: Select *Purchase Order Inquiry* from the *Home Screen* or the *Orders* drop-down menu.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Purchase Order Inquiry* authority can display this screen. See the *Role Wizard* for more information.

How to display purchase orders on this screen: When you first advance to the **Purchase Order Inquiry** screen, no purchase orders are displayed. Click *Search* to display purchase orders matching your search criteria or to refresh the purchase orders displayed.

View by purchase order or item: You can use the View Results By option to switch the information displayed:

- *Purchase Order:* displays information about the entire purchase order, such as shipping address. With this view, if the purchase order includes more than one line, the Due Date displayed is based on the first line on the purchase order. This is the default view.

  Item: displays information about the line(s) on the purchase order, such as your item number, the vendor's item number, and the ordered quantity.
- Most of the same information is displayed whether you view results by purchase order or by item. The information always displayed includes the purchase order number, the sales order number, and the date when you created the purchase order.

Sort order: The purchase orders are sorted first based on the PO created (entered) date. Within that date, they are sorted by the date and time when the purchase order was submitted to the vendor for fulfillment.

How to view purchase order updates? Click *Search* to refresh the screen and show current purchase order information.

How many records displayed? The screen displays up to 50 purchase orders or items.

Options at this screen

Option	Procedure
search for purchase orders and display customer and other header-level information	• Leave the View Results By option set to *Purchase Order*. • Optionally, you can enter any search criteria at the top of the screen. See below for descriptions. • Click *Search*. The screen displays up to 30 purchase orders.
search for purchase orders, and include item information among the information displayed	• Set the View Results By option to *Item*. • Optionally, you can enter any search criteria at the top of the screen. See below for descriptions. • Click *Search*. The screen displays up to 500 lines on purchase orders. **Case:** The enterable fields on this screen are not case-sensitive for searching; for example, an entry of `po123` matches a purchase order number of `PO123`.
view more information about the purchase order	Click the display icon ( ) next to a purchase order or item to advance to the *Purchase Order* screen, where you can view information about the purchase order such as: • sold-to and ship-to customer names and addresses • ship via and shipping instructions • order totals and messages • lines, including any special handling instructions or item-related messages • purchase order line history invoices that include any purchase order lines If the *Purchase Order* screen is already open in another tab, you advance to that screen, where the previously-selected purchase order is displayed. The information displayed at the *Purchase Order* screen is related to the purchase order as a whole, regardless of whether you have been reviewing results by item or by purchase order.

Fields at this screen

Fields	Description
Search fields	Optionally, complete any of the fields below before you click *Search* to display purchase order or items that match your entries.
Organization	See *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.

Fields	Description
Vendor	Optionally, select a vendor associated with your organization from the drop-down list to display purchase orders assigned to that vendor. The name or description of the vendor is displayed. See *Vendors* for background. **Vendor name anonymized?** If the data for a vendor on a purchase order has been anonymized (deleted and replaced with asterisks), searching by the vendor is not supported.See *Anonymizing Data* for background.
PO Number	Optionally, enter a full or partial number or code identifying the purchase order in the originating system, such as Order Management System or CWDirect, to display purchase orders that start with or match your entry. Can include numbers, letters, spaces, or special characters. Up to 50 positions. **Case:** If the originating system includes any lowercase letters in the purchase order number, Order Broker converts them to uppercase when creating the purchase order. Not case-sensitive for searching; an entry of `A` or `a` matches an purchase order number of `A12345`.
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system, such as Order Management System or CWDirect, to display purchase orders whose order numbers start with your entry. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.
Date Created	Optionally, enter or select the PO entered date to display purchase orders created on that date. Might not be the same as the date when the sales order was created. Format is based on the settings at the *User Profile Configuration* screen.
Brand	Optionally, select a brand associated with your organization to display purchase orders for that brand. See the *Brands* screen in Modern View for background.

Fields	Description
Status	Select a status to display purchase orders or lines that are in the selected status. **View Results By setting:** If the View Results By option is set to *Purchase Order*, purchase orders that match the selected status are displayed; otherwise, if the View Results By option is set to *Item*, lines in the selected status are displayed. Possible statuses are: • *Cancelled:* You have cancelled the line or the entire purchase order. • *Complete (multi-line purchase orders only):* The purchase order includes more than one line, and the line statuses include a combination of *Cancelled* and *Shipped*; there are no remaining open lines. • *Held:* The vendor has held the line(s) on the purchase order from processing. The vendor might put a line on hold if the vendor cannot fulfill it, and is requesting that you cancel the line. When a line on a purchase order is on hold, it is not eligible for pack slip generation or to be sent to an integrated vendor; or, if the purchase order line was already in process, the line is not eligible for shipment confirmation, and if the vendor uses the void/reprint option, the held line is omitted from the new pack slip. • *In Process:* The vendor has generated pack slips for the entire purchase order or the line, or sent the purchase order to the vendor's system (and the batch was acknowledged, if required) if it is an integrated vendor. • *New Order:* The vendor has received the purchase order, but has not yet generated pack slips for the entire purchase order or the line; or, in the case of an integrated vendor, the vendor has not yet received the purchase order or required acknowledgment, if required. • *Open (multi-line purchase orders only):* The purchase order includes more than one line, and the line statuses include at least one line that is *Held, In Process*, or *New Order*. • *Shipped:* The vendor has confirmed shipment of the entire purchase order or the line. **Note:** If you switch the View Results By setting, your selection in this field is cleared, because possible line statuses differ from possible purchase order statuses.

Fields	Description
Item #	Your item number or code. Optionally, enter a full or partial item code to display purchase orders or items if the items start with or match your entry. For example, if you sell items ABC111 and ABC123, entering ABC1 matches both of these items. Up to 35 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an item number of `A12345`.
Vendor Item #	The vendor's item number or code. Optionally, enter a full or partial item code to display purchase orders or items if the vendor's item codes start with or match your entry. For example, if the vendor has item codes XYZ222 and XYZ234, entering XYZ2 matches both of these retailer items. Up to 35 positions. Not case-sensitive for searching; an entry of `A` or `a` matches a vendor item number of `A12345`.
Due Date	Optionally, select a date from the calendar control to display purchase orders or lines whose original due dates match your entry. When searching by: • purchase order: select a due date to display purchase orders whose earliest original due date (not revised due date) matches your selection. • item: select a due date to display lines whose original due date (not revised due date) matches your selection.
View Results By	Controls whether the information in the *Search Result fields* includes information about the entire purchase order or the lines on the purchase order. If you set this option to: • *Purchase Order* (default): The information displayed includes: – the *Brand* – the *Vendor* – the *Customer Ship To*, including the name, company name, state/province, postal code, and country – the *Date Created* – the earliest *Due Date* for a line on the purchase order – the *Order Status* • *Item*: The information displayed includes: – the *Item #*, *Vendor Item #*, and *Ordered Units* – the *Date Created* – the *Due Date* for the line – the *Line Status* – Whether you search by purchase order or by item, the results always display the *PO Number*, *Order Number*, and *Vendor*.
Search Result fields	

Fields	Description
PO Number	The number or code identifying the purchase order in the originating system, such as Order Management System or CWDirect. **Case:** If the originating system includes any lowercase letters in the purchase order number, Order Broker converts them to uppercase when creating the purchase order.
Order Number	The number or code identifying the sales order in the originating system, such as Order Management System or CWDirect.
Vendor	The name or description of the vendor assigned to fulfill the purchase order. Up to 40 positions; truncated if it exceeds the allotted space. **Vendor anonymized?** If the data for a vendor on a purchase order has been anonymized (deleted and replaced with asterisks), the name is displayed as: *** *** *** See *Anonymizing Data* for background.
Brand	The name or description of the brand associated with the purchase order. Displayed only when View Results By is set to *Purchase Order*. Up to 40 positions; truncated if it exceeds the allotted space.
Customer Ship To	Information about the shipping address on the order. Displayed only when View Results By is set to *Purchase Order*. Includes the first and last name or the company name. **Customer anonymized?** If the data for a customer ship-to on a purchase order has been anonymized (deleted and replaced with asterisks), the customer name is displayed as: *** *** *** See *Anonymizing Data* for background.
Vendor Item #	The vendor's item number or code. Displayed only when View Results By is set to *Item*. Hold the pointer over the Vendor Item # to display the vendor's description of the item.
Item #	Your item number or code. Displayed only when View Results By is set to *Item*. Hold the pointer over the Item # to display a description of the item.
Date Created	The date when the purchase order was created. Might not be the same as the date when the sales order was created. Format is based on the settings at the *User Profile Configuration* screen.

Fields	Description
Due Date	When View Results By is set to: • *Purchase Order:* the earliest original due date for a line on the purchase order. • *Item:* the original due date for the line. The revised due date, if any, is not displayed. No due date is displayed when you review results by purchase order if the entire purchase order is shipped. Format is based on the settings at the *User Profile Configuration* screen.
Order Status	The status of the purchase order. Displayed only when View Results By is set to *Purchase Order*. See the *Status*, above, for more information.
Line Status	The status of the line on the purchase order. Displayed only when View Results By is set to *Item*. See the *Status*, above, for more information.
Ordered Units	The total number of units of the item for the vendor to ship. Displayed only when View Results By is set to *Item*.
Display	Click the Display icon ( ) to advance to the *Purchase Order* screen, where you can review the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.

Purchase Order

Purpose: Use the **Purchase Order** screen to review detailed information about a purchase order, including:

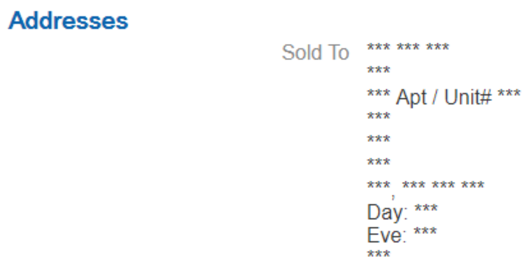
- the sold-to and ship-to addresses
- shipping instructions and messages
- the lines on the purchase order, including any special handling instructions or line-specific messages
- history of activity related to the purchase order, such as processing and shipment, or cancellation, address change, cost change, or due date revision
- invoices that include any lines on the purchase order

Used for the Supplier Direct Fulfillment module.

Reviewing purchase order information: Open the tab related to the information to be reviewed:

- *Header tab:* order summary information, including the sold-to customer and the shipping address. This tab is open by default.

Customer name anonymized? If the customer data on a purchase order has been *anonymized* (deleted and replaced with asterisks), the sold-to and ship-to customer name is displayed as:



See *Anonymizing Data* for background.

> **Note:**
>
> The *Purchase Order Information* at the top of the screen is always displayed regardless of which tab is open.

- *Detail tab:* the lines on the purchase order. From this tab, you can also advance to additional windows displaying:
  - customization instructions: *Browse Detail Customizations* window
  - messages related to a line: *Browse Purchase Order Detail Messages* window
  - additional details about a line: *Display Purchase Order Item* window
- *Invoices tab:* information about each invoice that includes any lines from the purchase order. From this tab, you can also advance to the *Invoice* screen.
- *History tab:* activity that has taken place for the purchase order, See the *History tab* for more information. From this tab, you can also advance to the *Purchase Order History Detail* window if there has been an address change request for the purchase order
- *Messages tab:* sales order or gift messages. See the *Messages tab* for more information.

> **Note:**
>
> When you are on this screen, the information displayed is not automatically refreshed. For example, if you review the information at the Header tab and then click the *History tab*, any recent activity that has taken place while you were reviewing the Header tab is not displayed at the History tab. To refresh the information on this screen, exit the screen and then select it again from the *Purchase Order Inquiry* screen.

How to display this screen: Select *Display* for a purchase order at the *Purchase Order Inquiry* screen.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Purchase Order Inquiry* authority can display this screen. See the *Role Wizard* for more information.

Fields at this screen

Fields	Description
Purchase Order Information unlabeled area at the top of the screen	
Purchase Order Number	The number or code identifying the purchase order in the originating system, such as Order Management System or CWDirect. From the `po_no` in the *CreateDSOrder* message. **Case:** If the originating system includes any lowercase letters in the purchase order number, Order Broker converts them to uppercase when creating the purchase order.
Date Created	The PO entered date provided by the retailer. Might not be the same as the date when the originating system submitted the purchase order to Order Broker. From the `po_entered_date` in the *CreateDSOrder* message. Format is based on the settings at the *User Profile Configuration* screen.
Sales Order Number	The number or code identifying the sales order in the originating system. From the `order_id` in the *CreateDSOrder* message.

Fields	Description
Order Status	Possible statuses are: • *Cancelled:* You have cancelled the entire purchase order. *Complete (multi-line purchase orders only):* The purchase order includes more than one line, and the line statuses include a combination of *Cancelled* and *Shipped*; there are no remaining open lines. • *Held:* The vendor has held the line(s) on the purchase order from processing. The vendor might put a line on hold if the vendor cannot fulfill it, and is requesting that you cancel the line. When a line on a purchase order is on hold, it is not eligible for pack slip generation or to be sent to an *integrated vendor*; or, if the purchase order line was already in process, the line is not eligible for shipment confirmation, and if the vendor uses the void/reprint option, the held line is omitted from the new pack slip. • *In Process:* The vendor has generated pack slips for the entire purchase order or the line, or sent the purchase order to the vendor's system (and the batch was acknowledged, if required) if it is an *integrated vendor*. • *New Order:* The vendor has received the purchase order, but has not yet generated pack slips for the entire purchase order or the line; or, in the case of an *integrated vendor*, the vendor has not yet received the purchase order or required acknowledgment, if required. • *Open (multi-line purchase orders only):* The purchase order includes more than one line, and the line statuses include at least one line that is *Held*, *In Process*, or *New Order*. • *Shipped:* The vendor has confirmed shipment of the entire purchase order.
Brand	The name or description of the brand associated with the purchase order. See the *Brands* screen in Modern View for background. Identified through the `brand_cd` in the *CreateDSOrder* message. If the brand name has changed, the name in effect when the purchase order was created is displayed.
Placed	The code and description of the location originating the sales order. From the `requesting_location_cd` in the *CreateDSOrder* message. Typically identifies your distribution center. Separated by a hyphen (-).

Fields	Description
Vendor	The name or description of the vendor assigned to fulfill the purchase order. Up to 40 positions. The vendor code follows in parentheses. Up to 10 positions. From the `vendor_cd` in the *CreateDSOrder* message. **Vendor name anonymized?** If the data for a vendor on a purchase order has been anonymized (deleted and replaced with asterisks), searching by the vendor is not supported.See *Anonymizing Data* for background.
Organization	The name or description of the organization associated with the purchase order. See *organization*. **Pending address change request?** The screen displays a message in red if there is an address change request submitted to the vendor and pending approval. Use the *Purchase Order History Detail* window to review the requested change. This message continues to be displayed even if the vendor confirms shipment of the line(s) without accepting or rejecting the address change.
Header tab: Header summary fields	This area displays additional summary information about the order.
Next Due Date	The earliest due date on any of the lines on the purchase order, regardless of whether the earliest due date has passed. Blank if the entire purchase order has shipped. Format is based on the settings at the *User Profile Configuration* screen.
Ship Via	The code and description identifying the preferred shipper to use for the purchase order, separated by a hyphen. From the `carrier_cd` for the first item in the *CreateDSOrder* message. Not updated at shipment, even if the vendor specifies a different carrier. If the carrier description has changed, the description in effect when the purchase order was created is displayed.
Gift	Set to *Y* if the sales order is a gift order; in this case, no prices, charges, or totals print on the pack slip. From the `gift` setting in the *CreateDSOrder* message.
Buyer	The code and name of the buyer for the purchase order. From the `carrier_cd` for the first item in the *CreateDSOrder* message. Separated by a hyphen (-).
Shipping Instructions	The general shipping instructions for the order. From the `shipping_instructions` in the *CreateDSOrder* message. CWDirect and Order Management System include shipping instructions such as `DRP SHP ORD#00012025`, where `12025` is the sales order number. There may be additional instructions for the purchase order, such as customization instructions, gift messages, or order messages at the *Browse Detail Customizations* window, *Browse Purchase Order Detail Messages* window, and *Messages tab*,

Fields	Description
Ship Complete	Set to *Y* if the purchase order should be shipped in a single shipment. From the `ship_complete` setting in the *CreateDSOrder* message. Informational only; does not control pack slip generation.
Total	The purchase order total, including the extended prices of all detail lines. Does not include additional charges, freight, additional freight, tax, or tax on freight. The currency symbol displayed is based on the `vendor_currency_cd` in the *CreateDSOrder* message.
Discount	The discount percentage or discount amount specified in the CreateDSOrder message. Zeros are displayed if no discount was specified in the message. Separated by a slash (/). From the `discount_percentage` and `discount_amount` in the *CreateDSOrder* message. The currency symbol displayed for the discount amount is based on the *Currency* specified for the purchase order.
Currency	The code identifying the currency on the sales order. Controls the currency symbol displayed for the purchase order. From the `vendor_currency_cd` in the *CreateDSOrder* message.
Header tab: Address fields	This area displays name and address information about the sold-to and ship-to.

<table>
<tr><th>Fields</th><th>Description</th></tr>
<tr><td>Sold To</td><td>The customer who placed the sales order. Includes:

name: prefix (such as Mr. or Dr.), first name, middle name, last name, and suffix (such as Jr. or Esq.)
company name
first address line
apartment, unit, or suite number (prefixed by the label Apt / Unit #:)
address line 2
address line 3
address line 4
city, state, postal or zip code, country code

Note:
If the originating system includes any lowercase letters in the postal code, Order Broker converts them to uppercase when creating the purchase order.

daytime phone number (prefixed by the label Day:)
evening phone number (prefixed by the label Eve:)
email address

Note:
Not all of the information above might be available for each customer. At a minimum, the customer information must include:

first and last name or company
first address line
city, postal or zip code, and country code

From the <code>sold_to</code> information in the CreateDSOrder message.
Customer anonymized? If the data for a customer sold-to on a purchase order has been anonymized (deleted and replaced with asterisks), the customer name is displayed as asterisks. See Anonymizing Data for background.</td></tr>
</table>

Fields	Description
Ship To	The customer to receive the line(s) on the purchase order. Includes the same information as the sold-to customer name and address, listed above. From the `ship_to` information in the *CreateDSOrder* message. **Customer anonymized?** If the data for a customer ship-to on a purchase order has been anonymized (deleted and replaced with asterisks), the customer name is displayed as asterisks. See *Anonymizing Data* for background.
Header tab: Sales Order Summary fields	
Pay Method	The description of the payment method on the sales order. From the `tender_description` in the *CreateDSOrder* message. Set to *MULTI PAY* if the originating sales order had more than one payment method.
Freight Charges	The freight charges from the sales order. From the `freight_amount` in the *CreateDSOrder* message. Rounded to a 2-position decimal.
Additional Charges	The additional freight charges (not the additional charges) from the sales order. From the `order_additional_freight_charges` in the *CreateDSOrder* message. Rounded to a 2-position decimal.
Paid Amount	The amount prepaid on the sales order. From the `tender_amount` in the *CreateDSOrder* message. Rounded to a 2-position decimal.
Tax on Freight	The tax on freight charges from the sales order. From the `freight_tax` in the *CreateDSOrder* message. Rounded to a 2-position decimal.
Tax Charges	The total tax for the items on the purchase order. The total of the `amount` from the `tax` for each purchase order detail included in the *CreateDSOrder* message. Rounded to a 2-position decimal.
Detail tab	This tab displays information about the line(s) on the purchase order, and includes options to display additional information about the line(s).
Line #	The line number identifying the item on the purchase order. From the `po_line_no` in the *CreateDSOrder* message.
Item #	The item number or code. Hold the pointer over the Item # to display the vendor item number or code and description. From the `retailer_item_id` in the *CreateDSOrder* message.
Item Description	A description of the item. Hold the pointer over the Item Description to display your description of the item. From the `retailer_item_description` in the *CreateDSOrder* message.

Fields	Description
Order Qty	The total quantity of the item ordered by the customer. From the `po_qty_ordered` in the *CreateDSOrder* message.
Shipped Qty	The total confirmed shipment quantity of the item.
Printed Qty	The total quantity of the item that the vendor currently has on a generated pack slip or extracted to the vendor's system, but not yet confirmed as shipped.
Cancel Qty	The total quantity of the item that you have cancelled. **Note:** CWDirect and Order Management System do not support partial quantity cancellations. Additional information on canceling a partial quantity will be provided by Oracle at a later date.
Line Status	The current status of the line on the purchase order. Possible statuses are: • *Cancelled:* You have cancelled the line. • *Held:* The vendor has held the line(s) on the purchase order from processing. The vendor might put a line on hold if the vendor cannot fulfill it, and is requesting that you cancel the line. When a line on a purchase order is on hold, it is not eligible for pack slip generation or to be sent to an *integrated vendor*; or, if the purchase order line was already in process, the line is not eligible for shipment confirmation, and if the vendor uses the void/reprint option, the held line is omitted from the new pack slip. • *In Process:* The vendor has generated pack slips for the entire purchase order or the line, or sent the purchase order to the vendor's system (and the batch was acknowledged, if required) if it is an *integrated vendor*. • *New Order:* The vendor has received the purchase order, but has not yet generated pack slips for the entire purchase order or the line; or, in the case of an *integrated vendor*, the vendor has not yet received the purchase order or required acknowledgment, if required. • *Shipped:* The vendor has confirmed shipment of the line. **Note:** The line status is different from the *Order Status* if the purchase order has more than one line, and the lines have different statuses.
Due Date	The current due date for the line. Can differ from the original due date if the vendor has entered a revised due date. Included even if the item has shipped. The original due date is from the `po_line_due_date` in the *CreateDSOrder* message.
Custom	Select the icon ( ) in the *Custom* column to advance to the *Browse Detail Customizations* window, where you can review the special handling instructions for the line. Available only if there are special handling instructions.

Fields	Description
Messages	Select the icon ( ) in the *Messages* column to advance to the *Browse Purchase Order Detail Messages* window, where you can review any sales order line messages for the line. Available only if there are order line messages.
Display	Select the icon ( ) in the *Display* column to advance to the *Display Purchase Order Item* window, where you can review additional details about the line.
Invoices tab	This tab displays information on any invoices the vendor has created for the items on the purchase order. **Multiple shipments?** If the invoice includes multiple shipments against a single purchase order line, each shipment is listed separately. If the vendor deletes an invoice that is in *New* or *Rejected* status, it is no longer displayed at this tab. The vendor cannot delete an invoice in any other status. See *Invoice Inquiry* for more information on invoices.
Line #	The line number included on the invoice.
Item #	The item number or code identifying the shipped item included in the invoice. The description of the item is to the right, separated by a hyphen (-).
Invoice Number	The invoice number specified by the vendor when creating the invoice.
Invoice Date	The date the vendor specified for the invoice. Format is based on the settings at the *User Profile Configuration* screen.
Invoice Qty	The total quantity of the item included in the shipment and being billed on this invoice.

Fields	Description
Invoice Unit Cost	The vendor's unit cost for the shipment. Multiplied by the Invoice Qty. **Different unit cost?** If the vendor specifies an invoice unit cost that exceeds or falls short of the original PO Unit Cost by more than the *Unit Cost Threshold* you have specified for the vendor, the invoice detail line is *out-of-balance*. For example, if you set the threshold at 10%, and the vendor changes the invoice unit cost (higher or lower) by more than 10%, the invoice detail line is out-of-balance. **Held invoice?** When the vendor submits an invoice that includes any *out-of-balance* lines, the invoice goes into *Held* status, and you need to either approve or reject the invoice. If you accept the invoice, it posts to the originating system. If you reject the invoice, the vendor can edit the invoice, including the Invoice Unit Cost, again, and resubmit the invoice; or the vendor can delete the invoice. **Email notification to vendor:** The vendor receives an email notification when you accept or reject an out-of-balance invoice if indicated by the *Invoice Balance Notification* setting at the *Email* folder of the *Preferences* tab of the *New Vendor* or **Edit Vendor** screen.
Display	Optionally, select the display icon ( ) to advance to the *Invoice* screen, where you can review details about the invoice.
History tab	This tab displays an entry for each activity that occurs related to a purchase order or a line on the purchase order. See
Line #	The line number updated by the activity. In the case of purchase order creation, there is a history record for each line on the purchase order.
Item (unlabeled field)	The item code for the item updated by the activity. In the case of purchase order creation, there is a history record for each item on the purchase order. From the `retailer_item_id` in the *CreateDSOrder* message. The description of the item is to the right.
Quantity	The quantity updated by the activity.
Action Type	Possible action types are described below under *Purchase Order History Entries*.
Status	The status of the line after the activity took place. See *Purchase Order History Entries*, below, for details, and see *Line Status* for a list of possible statuses.
Date / Time	The date and time when the activity took place. Format is based on the settings at the *User Profile Configuration* screen.

Fields	Description
User	The user who performed the activity. • A user of Admin is listed for purchase order creation, address update requests, cancellation requests, and cost changes. • A user of SYSTEM is listed when the customer data on the purchase order is *anonymized*. • Otherwise, this is the user ID of the *vendor user* who performed the action.
Source	Indicates where the activity originated: • UI (user interface) = the activity took place at a screen • WS (web service) = the activity originated from a web service message, such as the *CreateDSOrder* message, or through the vendor integration if this is an *integrated vendor*; or the purchase order was *anonymized*, either through the *Completed Order Private Data Purge* job, or through the ForgetPrivateData web service request.
Transaction Notes	Additional information about the activity. See *Purchase Order History Entries* for details and examples.
Details	If you have requested an address change, click the details icon ( ) to advance to the *Purchase Order History Detail* window, where you can review the details of a shipping address change, including the address before and after the change. This option is displayed only if the address change was: • submitted when the line was in *New Order* status, before the vendor generated the pack slip or received the purchase order through the vendor integration, so that the address change applied automatically; or, • submitted when the line was in *In Process* or *Held* status, after the vendor generated the pack slip or received the purchase order through the vendor integration. In this case, the option is available regardless of whether the vendor accepted or declined the address change. • If you request an address change when the line is in *Shipped* or *Cancelled* status, Order Broker automatically rejects the change, and there is no history record displayed here.
Messages tab	Message lines are consolidated at this tab, but print on separate lines on the pack slip. Sales order messages and gift messages are not *anonymized* when the customer data is anonymized.
Sales Order	This area displays messages related to the sales order originating the purchase order. From the `order_message` in the *CreateDSOrder* message.

Fields	Description
Gift Messages	This area displays gift messages related to the sales order. From the `gift_message` in the *CreateDSOrder* message.

Purchase Order History Entries

The following table presents a summary of purchase order history entries.

Action Type	Created When	Source	Status	Transaction Notes
Simple Process Updates				
PO Created	You submit the purchase order to Order Broker for fulfillment via the CreateDSOrder message. A separate history record is created for each line on the purchase order.	WS	New Order	none
PackSlip	The vendor generates pack slips for printing (PDF files) or extract to the vendor's system (CSV files).	UI	In Process	Indicates the batch ID that includes the pack slip (for example, Batch ID (74)).
PackSlip	If an *integrated vendor*: the purchase order has been sent to the integrated system.	WS	New Order or In Process	Indicates the batch ID, as above. Status remains *New Order* until the batch of purchase orders is acknowledged, if the *Require Acknowledgement* flag is selected; in this case, a separate history entry indicates when the batch is acknowledged.
Shipment	The vendor confirms shipment.	UI	Shipped	Indicates the ship date, carrier code, tracking number, weight, and freight rate, for example: `Ship Date: 07/17/2013, Carrier: 50, Tracking #: Track12155, Weight: 2.34, Rate: $ 1.23`
Shipment	An *integrated vendor* confirms shipment through the integration.	WS	Shipped	

Action Type	Created When	Source	Status	Transaction Notes
Cancellation Requests				
Cancel	You submit a cancellation request for a line in New Order status.	WS	Cancelled	Automatically Cancelled
Cancel	You submit a cancellation request for a line in In Process or Held status.	WS	unchanged	Cancel Requested
Cancel	The vendor accepts a cancel request, either at the **Purchase Order Change Requests** screen or automatically when a line returns to New Order status after the vendor releases the line from hold or voids (but doesn't reprint) the pack slip.	UI	Cancelled	Cancellation Approved
Cancel	The vendor declines a cancel request.	UI	unchanged	Cancellation Rejected
Cancel Auto Rejected	You send a cancellation request for a line that is already in Shipped or Canceled status, or if the requested cancel quantity exceeds the current open quantity on the line.	WS	unchanged	Cancel Request Auto Rejected
Address Change Requests				
Address Change	You submit an address change request for a purchase order in New Order status.	WS	New Order	Address Change Automatically Applied
Address Change	You submit an address change request for a purchase order in In Process or Held status.	WS	unchanged	Address Change Requested
Address Change	The vendor declines an address change request.	UI	unchanged	Address Change Rejected

Action Type	Created When	Source	Status	Transaction Notes
Address Change	The vendor accepts an address change request, either at the **Purchase Order Change Requests** screen or automatically when a line returns to New Order status after the vendor releases the line from hold, ships a partial quantity and returns the line to New Order status, or voids (but doesn't reprint) the pack slip.	UI	unchanged	Address Change Approved
Address Change	The vendor ships a purchase order with an outstanding address change request. This message is written only for the first item on the shipment.	UI	Shipped	Address Change Auto Rejected
If the purchase order is in Open status: A purchase order in Open status can include lines in New Order, Held, Shipped, Cancelled, In Process status. In this situation, each line remaining line is treated separately.				
Cost Changes				
Cost Change	You submit a cost change for a line on a purchase order to update the unit price.	WS	unchanged	Before $8.98 - After $ 9.98 (where $ 8.98 is the previous unit price, and $ 9.98 is the new unit price) **Note:**The currency symbol displayed is based on the *Currency* specified for the purchase order.
Additional Changes				

Action Type	Created When	Source	Status	Transaction Notes
Data Removal	Private data is anonymized.	WS	previous status	PII Data Anonymized
Maintenance	The vendor puts a line on hold.	UI	Held	Held: Backordered (where Backordered is the Reason Description entered by the vendor)
Maintenance	The vendor releases a line from hold.	UI	previous status	Released **Note:**The Reason Description is not listed here even if the vendor entered one while releasing the line from hold.
Maintenance	The vendor revises the line's Due Date.	UI	unchanged	Maintenance Delay Revised Due Date: 06/28/2022 (where Delay is the Reason Description entered by the vendor and 6/28/2022 is the revised due date)
Maintenance	The vendor enters a Reason Description without changing the line's hold status or revising the due date.	UI	unchanged	Maintenance Expected next week (where Expected next week is the Reason Description entered by the vendor)
Maintenance	The vendor deletes a Reason Description for an line that is not held and does not have a revised due date.	UI	unchanged	Maintenance
Pack Slip Reprinted	The vendor uses the **Void/Reprint Pack Slip** screen or the *Reprint Pack Slip* option at the **Purchase Order** screen to void and reprint the pack slip.	UI	In Process	Indicates the new batch ID (for example, Batch ID (74)).
Pack Slip Voided	The vendor uses the **Void/Reprint Pack Slip** screen to void but not reprint the pack slip by setting the New Print Qty of all printed lines to *0*.	UI	New Order	Indicates the current batch number voided (for example, Batch ID 73)).

Action Type	Created When	Source	Status	Transaction Notes
Re-opened	The vendor confirms shipment of the entire printed quantity of a line, but there is an additional unprinted quantity because the vendor previously used the **Void/Reprint Pack Slip** screen to reduce the printed quantity.	UI	New Order	
Data Removal	The customer data for the purchase order was *anonymized*, either through the *Completed Order Private Data Purge* job, or through the ForgetPrivateData web service request	WS	unchanged	Private Data Anonymized

Browse Detail Customizations

Purpose: Use the **Browse Detail Customizations** window to review the special handling instructions for an item on a purchase order. The special handling instructions also print on the pack slip.

Used for the Supplier Direct Fulfillment module.

Information from CWDirect or Order Management System: CWDirect and Order Management System send special handling instructions for drop ship items if the items use a custom special handling format, which includes a definition of each type of instruction (such as monogramming or hemming). If the drop ship items use standard special handling, which consists of free-form text, CWDirect and Order Management System do not sent this information to Order Broker.

How to display this window: Select the icon ( ) in the *Custom* column at the *Detail tab* of the *Purchase Order* screen.

Note:

Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Purchase Order Inquiry* authority can display this window. See the *Role Wizard* for more information.

Fields at this window

Field	Description
Line #	The purchase order line number identifying the item receiving the special handling.

Field	Description
Vendor Item #	The vendor's code or number identifying the item receiving the special handling. The description of the item follows, separated by a hyphen (-).
Retailer Item	The code or number identifying the item in the originating system, such as Order Management System or CWDirect. The description of the item follows, separated by a hyphen (-).
Label	The code identifying the type of special handling instructions, such as monogramming or hemming. Identified as the Label in Order Management System or CWDirect. From the `customization_code` in the *CreateDSOrder* message.
Value	The instructions related to the type of special handling, such as the letters to monogram or the length to hem. If the customization message is too wide based on the number of characters and their widths (a *W* being wider than an *i*), the message may be truncated on the window. Identified as the Input in Order Management System or CWDirect. From the `customization_message` in the *CreateDSOrder* message. The customization label and instructions also print on the pack slip. The pack slip can print a wider customization than the **Browse Detail Customizations** window can display; however, if the message is too wide it is truncated on the pack slip as well.

Scroll up or down: Click the next arrow () to display the special handling instructions, if any, for the next line on the purchase order. Similarly, click the previous arrow () to display the special handling instructions, if any, for the previous line on the purchase order.

If there are no special handling instructions for the next or previous line, the Label and Value fields displayed are blank.

Browse Purchase Order Detail Messages

Purpose: Use the **Display Purchase Order Detail Messages** window to review a sales order message related to an item on a purchase order.

Used for the Supplier Direct Fulfillment module.

Information from Order Management System or CWDirect: Order Management System and CWDirect send order line messages for drop ship items if the items if the messages are flagged to print on picks, or on both invoices and picks (although Oracle Retail Order Management System Cloud Service 15.0 and later does not support the invoicing integration). You use the Work with Order Line Messages screen to work with or review these message lines in Order Management System and CWDirect.

How to display this window: Select the icon ( ) in the *Messages* column at the *Detail tab* of the *Purchase Order* screen.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Purchase Order Inquiry* authority can display this window. See the *Role Wizard* for more information.

Fields at this window

Field	Description
Line #	The purchase order line number identifying the item.
Vendor Item #	The vendor's code or number identifying the item. The vendor's description of the item follows, separated by a hyphen (-).
Item #	The item number or code. The description of the item follows, separated by a hyphen (-).
Sales Order Line Message	A message related to the item on the sales order. From the `order_line_message` in the *CreateDSOrder* message.

Scroll up or down: Click the next arrow () to display the sales order message for the next line on the purchase order. Similarly, click the previous arrow () to display the sales order message for the previous line on the purchase order.

If there is no sales order message for the next or previous line, the Sales Order Line Message displayed is blank.

Display Purchase Order Item

Purpose: Use the **Display Purchase Order Item** window to review additional details about an item on a purchase order.

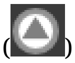
Used for the Supplier Direct Fulfillment module.

How to display this window: Select the icon ( ) in the *Display* column at the *Detail tab* of the *Purchase Order* screen.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Purchase Order Inquiry* authority can display this window. See the *Role Wizard* for more information.

Options at this window

Option	Procedure
review the next item	Click the next icon () to display the next item.

Option	Procedure
review the previous item	Click the previous icon () to display the previous item.

Fields at this window

Field	Description
Line #	The purchase order line number identifying the item.
Item #	The code or number identifying the item. The description of the item follows, separated by a hyphen (-).
Vendor Item #	The vendor's item number or code. The vendor's description of the item follows, separated by a hyphen (-).
Gift Wrap	Set to *Y* if the item requires gift wrap. From the `order_line_gift_wrap` setting in the *CreateDSOrder* message.
Line Status	The current status of the item on the purchase order. Possible statuses are: • *Cancelled:* You have canceled the line. *Held:* The vendor has held the line(s) on the purchase order from processing. The vendor might put a line on hold if the vendor cannot fulfill it, and is requesting that you cancel the line. When a line on a purchase order is on hold, it is not eligible for pack slip generation or to be sent to an *integrated vendor*; or, if the purchase order line was already in process, the line is not eligible for shipment confirmation, and if the vendor uses the void/reprint option, the held line is omitted from the new pack slip. • *In Process:* The vendor has generated pack slips for the entire purchase order or the line, or sent the purchase order to the vendor's system (and the batch was acknowledged, if required) if it is an *integrated vendor*. • *New Order:* The vendor has received the purchase order, but has not yet generated pack slips for the entire purchase order or the line; or, in the case of an *integrated vendor*, the vendor has not yet received the purchase order or required acknowledgment, if required. • *Shipped:* The vendor has confirmed shipment of the line. **Note:** The line status is different from the *Order Status* if the purchase order has more than one line, and the lines have different statuses. See the *Order Status* for more information.
Original Due Date	The due date that was specified for the line. From the `po_line_due_date` in the *CreateDSOrder* message. Format is based on the settings at the *User Profile Configuration* screen.
Revised Due Date	The current due date for the line, if the vendor has entered a different due date. If the vendor has revised the due date more than once, the most recently entered due date is displayed. Format is based on the settings at the *User Profile Configuration* screen. When the vendor revises the due date, the vendor also needs to enter a *Reason Description*.

Field	Description
Reason Description	The reason for a change to the line on the purchase order. When the vendor revises the due date, the vendor also needs to enter a reason description. The vendor can also enter a reason description when changing a line's hold status, or for any other reason.
Ordered Qty	The original ordered quantity of the line. From the `po_qty_ordered` in the *CreateDSOrder* message.
Shipped Qty	The total quantity of the line for which the vendor has confirmed shipment.
Cancelled Qty	The total quantity of the line that you have cancelled.
Invoiced Qty	The total quantity that has been included on an invoice. See the *Invoices* tab at the *Purchase Order* screen for more information.
Unit of Measure	The unit of measure. From the `vendor_uom_code` in the *CreateDSOrder* message. Informational only.
Unit Price	The vendor's single-unit price for the item. Rounded to 2 decimal positions (for example, a price of $1.3456 is rounded to $1.35). The currency symbol displayed is based on the *Currency* specified for the purchase order. From the `vendor_unit_price` in the *CreateDSOrder* message.
Ext. Price	The extended price for the item, calculated by multiplying the Ordered Qty * the Unit Price. Rounded to 2 decimal positions. The currency symbol displayed is based on the *Currency* specified for the purchase order.
UPC Code	The item's UPC code, if any. From the `item_upc_cd` in the *CreateDSOrder* message.
EAN Code	The item's EAN code, if any. From the `item_ean_cd` in the *CreateDSOrder* message.
Status Date	The last date and time when the status of the line changed. Format is based on the settings at the *User Profile Configuration* screen.

Purchase Order History Detail

Purpose: Use the **Purchase Order History Detail** window to review:

- an address change applied automatically to a line because you submitted the change when the line was in *New Order* status
- an address change you requested when a line is in *In Process* or *Held* status; these address changes do not apply until the vendor accepts them

Used for the Supplier Direct Fulfillment module.

Submitting address changes: The system originating the purchase order, such as Order Management System or CWDirect, can submit an address change through the *SetDSAddress Change* message.

Automatically rejected? Address change requests are not available for review in this window if they arrive when the line is already in *Cancelled* or *Shipped* status. These address change requests are automatically rejected.

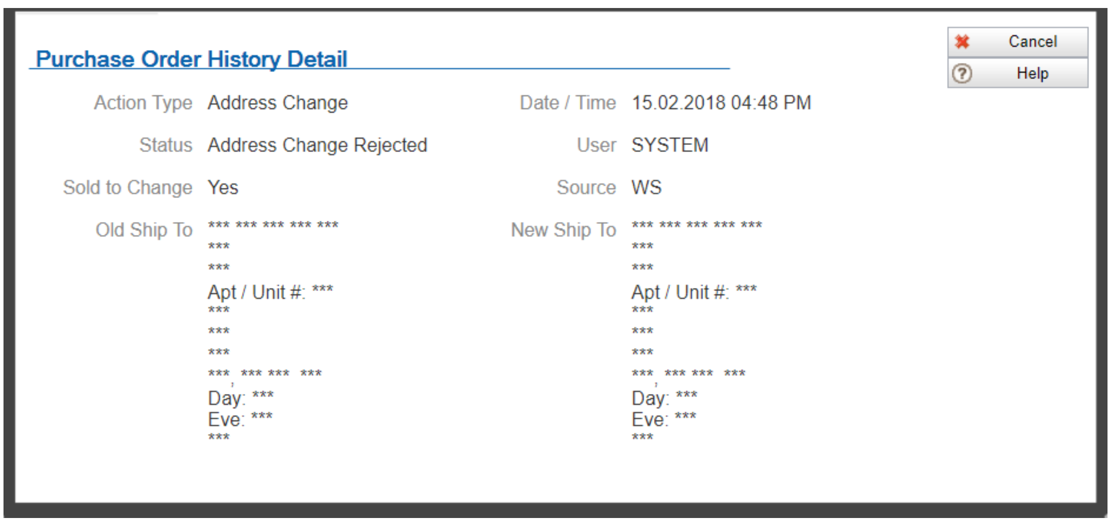
Address changes for different lines on the purchase order: Even though the address change request is related to the purchase order header, Order Broker evaluates the status of the individual lines on the purchase order when determining whether to apply the change, reject it automatically, or submit it to the vendor for review.

Example: A purchase order is in *Open* status, with one line in *In Process* status and one line in *Shipped* status. The vendor needs to approve or reject the address change for the line in *In Process* status. The address change is automatically rejected for the line in *Shipped* status.

What if you submit multiple address changes for the same line? If you submit a second or third address change for the same *In Process* or *Held* line before the vendor has accepted or rejected the previously rejected change, Order Broker automatically rejects the previous address change. In this situation, when you display the **Purchase Order History Detail** window, only the name and address information for the most recent address change is displayed.

If you submit multiple address changes for a *New Order* line before the vendor generates the pack slip, each address change is automatically applied, and is displayed at the **Purchase Order History Detail** window.

Customer data anonymized? If the customer data on a purchase order has been anonymized (deleted and replaced with asterisks), asterisks are displayed for the Old Ship To and New Ship To customer name, address, phone numbers, and email address:



The address change data is anonymized regardless of whether the address change applies automatically, is accepted by the vendor, or is rejected by the vendor.

See *Anonymizing Data* for background.

How to display this window: Select the icon () in the *Details* column at the *History tab* of the *Purchase Order* screen. This icon is displayed only if there is an address change request that was received when the line was in *New Order*, *In Process*, or *Held* status.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Purchase Order Inquiry* authority can display this window. See the *Role Wizard* for more information.

Troubleshooting: In order to open the *Purchase Order History Detail* window if you are using Internet Explorer 9.0 or 10.0, you need to make sure that you are not using Compatibility View.

Window displayed for multiple history records? If the address change was:

- *accepted by the vendor* = The window is available next to the history record marking both when the address change was requested and when the vendor approved the address change. The status indicated in both windows is *Address Change Approved*.
- *rejected by the vendor* = The window is available only next to the history record marking when the address change was requested. The status indicated is *Address Change Rejected*.

Fields at this window

Field	Description
Action Type	Always set to *Address Change*.
Date / Time	The date and time when the address change request was received. Format is based on the settings at the *User Profile Configuration* screen.
Status	The current status of the address change (not the status at the time the history record was created). Possible statuses are: • *Address Change Requested* = You have submitted an address change, the line is in *Held* or *In Process* status, and the vendor has not yet accepted or rejected the change. • *Address Change Automatically Applied* = Order Broker applied the address change automatically because the purchase order was in *New Order* status and the vendor had not yet generated a pack slip. • *Address Change Approved* = The vendor has accepted the address change for a *Held* or *In Process* line. This status is displayed in this window for both the original history record created when you requested the change, and the history record created when the vendor accepted the change. • *Address Change Rejected* = The vendor has rejected the address change for a *Held* or *In Process* line. This status is displayed in this window for both the original history record created when you requested the change, and the history record created when the vendor rejected the change.

User	The user ID of the person who performed the activity:
	• *Admin:* indicated when:
	  – you request an address change
	  – an address change is automatically applied to a *New Order* line
	  – an address change is automatically rejected when the vendor confirms shipment
	• a *vendor user* ID: indicated when the vendor accepts or rejects an address change

Sold To Change	Indicates whether the sold-to address for the purchase order is the same as the shipping address, so you request that both addresses be changed. Possible settings: • *Yes* = update both the sold-to address and the ship-to address • *No* = update the ship-to address only

Field	Description
Source	Indicates where the activity originated. Possible settings: • *WS* (web service) = you submitted the *SetDSAddress Change* message, or the change is automatically applied or rejected • *UI* (user interface) = the vendor accepted or rejected the change through the *Vendor Portal*
Old Ship To	The ship-to name and address before applying the change. Includes: • name: prefix (such as Mr. or Dr.), first name, middle name, last name, and suffix (such as Jr. or Esq.) • company name • first address line • apartment, unit, or suite number (prefixed by the label Apt / Unit #:) • address line 2 • address line 3 • address line 4 • city, state, postal or zip code, country code • daytime phone number (prefixed by the label Day:) • evening phone number (prefixed by the label Eve:) • email address This information is from the *CreateDSOrder* message. **Note:** Not all of the information above might be available for each customer. **Replaced with asterisks?** If the customer data on a purchase order has been *anonymized* (deleted and replaced with asterisks), asterisks are displayed for the Old Ship To and New Ship To customer name, address, phone numbers, and email address.
New Ship To	**Note:** The ship-to name and address with the changes indicated in red. Includes the same name and address fields as the Old Ship To. This information is from the *SetDSAddress Change* message. **Replaced with asterisks?** If the customer data on a purchase order has been *anonymized* (deleted and replaced with asterisks), asterisks are displayed for the Old Ship To and New Ship To customer name, address, phone numbers, and email address.

Invoice Inquiry

Purpose: Use the **Invoice Inquiry** screen to select invoices for review. You can also use this screen to select *Held* invoices so you can approve or reject them.

When is an invoice held? Order Broker holds an invoice if the invoice unit cost on one or more invoice detail lines exceeds or falls below the PO unit cost by more than the *Unit Cost Threshold* you have specified for the vendor. For example, if you set the Unit Cost Threshold to 10%, Order Broker holds the invoice if any invoice detail line's cost is more than 10% higher or lower than the original PO unit cost. These lines are considered *out-of-balance*.

When you advance to this screen, it displays a message indicating how many held invoices waiting for review, for example: `There are 3 held invoices awaiting review.`

Email notification: When a vendor submits an invoice that includes an *out-of-balance* line, Order Broker generates a notification to the *Invoice Balance Notification* email address specified at the *Email* tab of the *Drop Ship Preferences* screen if the *Invoice Balance Notification* flag is selected. See the *Out-of-balance invoice notification email to retailer* for a sample.

Held invoices message: When you first advance to this screen, a message indicates the number of held invoices waiting for your review.

Resending invoices to the order management system: If the order management system did not receive and create the invoices, you can resend one or more invoices by setting the posted_date in the vendor_invoice table to NULL. Order Broker then includes these invoices in the GetDSInvoicesResponse message the next time it receives the request from the order management system.

How to display: Select *Invoice Inquiry* from the *Home Screen* or the *Orders* drop-down menu.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Invoice Inquiry* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
search for invoices	When you first advance to this screen, no invoices are displayed. To search, complete any of the *Search fields* and click *Search*. **Case?** All the enterable fields on this screen are case-insensitive for searching; for example, an entry of `a` or `A` matches an invoice number of `ABC123`.
select an invoice for review or maintenance	Click the edit/display icon ( ) next to an invoice to advance to the *Invoice* screen, where you can review the information on the invoice. If the invoice is in *Held* status, you can also use the *Invoice* screen to accept or reject the invoice.

Fields at this screen

Fields	Description
Search fields	You can use any of the search fields, alone or in combination, to restrict the invoices displayed in the *Search Results fields*.
Organization	See *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.
Vendor	Optionally, select a vendor associated with your organization from the drop-down list to display purchase orders assigned to that vendor. The name or description of the vendor is displayed. See *Vendors* for background.

Fields	Description
Invoice Status	Optionally, select a status from the drop-down list and click *Search* to display invoices in that status, or leave this field blank to display invoices regardless of status. Possible statuses are: • *Approved* = The invoice was approved, either automatically or by you, but has not yet posted to the originating system. • *Held* = The vendor has submitted the invoice, and the invoice includes at least one line that is *out-of-balance* because the vendor changed the unit price by more than the *Unit Cost Threshold*: for example, you set a threshold of 10%, and the vendor changed the unit price by 15%. The invoice remains in *Held* status until the you either approve or reject it. • *New* = The vendor selected the *Update and Save for Changes* option when creating the invoice, and has not yet submitted the invoice to you for posting. • *Posted* = The invoice has been posted to the originating system, such as Order Management System or CWDirect, for payment processing. • *Rejected* = The vendor submitted an invoice that includes an *out-of-balance* line, and you rejected it. The vendor can change the invoice so that it no longer contains an out-of-balance line, or can delete the invoice.
Invoice Date	Optionally, select a date from the calendar control and click *Search* to display invoices with this date, or leave this field blank to display invoices regardless of date. This is the date the vendor specified when creating the invoice.
Invoice Number	Optionally, enter a full or partial invoice number and click *Search* to display invoices whose invoice number starts with or matches your entry. Not case-sensitive for searching; an entry of `A` or `a` matches an invoice number of `A12345`.
PO Number	Optionally, enter a full or partial purchase order number and click *Search* to display invoices that include any purchase orders whose numbers start with or match your entry. Not case-sensitive for searching; an entry of `A` or `a` matches a purchase order number of `A12345`.
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system and click *Search* to display invoices that include purchase orders for sales orders whose order numbers start with or match your entry. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.
Search Results fields	
Vendor	The name or description of the vendor. See *Vendors* for background.

Fields	Description
Invoice Number	The invoice number the vendor specified when creating the invoice.
Invoice Amount	The total amount on the invoice, including: • the current extended price on all invoice lines the freight, handling, and other charges at the invoice header level the freight, handling, and other charges for all invoice lines
Invoice Date	The date the vendor specified for the invoice. Format is based on the settings at the *User Profile Configuration* screen.
Invoice Status	The current status of the invoice. See the *Invoice Status*, above, for descriptions of possible statuses.
Display	Click the edit/display icon ( ) next to an invoice to advance to the *Invoice* screen, where you can review the information on the invoice. If the invoice is in *Held* status, you can also use the *Invoice* screen to accept or reject the invoice.

Invoice

Purpose: Use the **Invoice** screen to review an invoice, and to approve or reject a *Held* invoice.

When is an invoice held? Order Broker holds an invoice if the invoice unit cost on one or more invoice detail lines exceeds or falls below the PO unit cost by more than the *Unit Cost Threshold* you have specified for the vendor. For example, if you set the Unit Cost Threshold to 10%, Order Broker holds the invoice if any invoice detail line's cost is more than 10% higher or lower than the original PO unit cost. These lines are considered *out-of-balance*.

Approve or reject an invoice:

- Click *Approve* to open the *Approve Invoice* window if you do not require the vendor to edit the invoice before it is eligible to post to your system.
- Click *Reject* to open the *Reject Invoice* window if the vendor needs to edit the invoice before it is eligible to post to your system.

> **Note:**
>
> Only users with *Invoice Inquiry* and *Invoice Maintenance* authority can advance to these windows. See the *Role Wizard* for more information.

Email notification: When a vendor submits an invoice that includes an *out-of-balance* line, Order Broker generates a notification to the *Invoice Balance Notification* email address specified at the *Email* tab of the *Drop Ship Preferences* screen if the *Invoice Balance Notification* flag is selected. See the *Out-of-balance invoice notification email to retailer* for a sample.

How to display: Select *Display* for an invoice at the *Invoice Inquiry* screen.

Note:

- Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Invoice Inquiry* authority can display this screen. See the *Role Wizard* for more information.
- If the **Invoice** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previous invoice information displayed.

Fields at this screen

Fields	Description
Invoice Information	Unlabeled area at the top of the screen.
Invoice Number	The invoice number specified by the vendor when creating the invoice.
Organization	The name or description of the organization associated with the invoice. See *organization*.
Merchandise	The current extended price of all invoice lines.
Currency	A currency of USD is displayed regardless of the currency on the purchase orders included on the invoice.
Invoice Status	Possible statuses are: • *Approved* = The invoice was approved, either automatically or by you, but has not yet posted to the originating system. • *Held* = The vendor has submitted the invoice, and the invoice includes at least one line that is *out-of-balance* because the vendor changed the unit price by more than the *Unit Cost Threshold*: for example, you set a threshold of 10%, and the vendor changed the unit price by 15%. The invoice remains in *Held* status until the you either approve or reject it. • *New* = The vendor selected the *Update and Save for Changes* option when creating the invoice, and has not yet submitted the invoice to you for posting. • *Posted* = The invoice has been posted to the originating system for payment processing. • *Rejected* = The vendor submitted an invoice that includes an *out-of-balance* line, and you rejected it. The vendor can change the invoice so that it no longer contains an out-of-balance line, or can delete the invoice.
Vendor	The name or description of the vendor assigned to fulfill the purchase order. Up to 40 positions. The vendor code follows in parentheses. Up to 10 positions. From the `vendor_cd` in the *CreateDSOrder* message.

Fields	Description
Total	The total amount on the invoice, including: • the current extended price on all invoice lines • the freight, handling, and other charges at the invoice header level • the freight, handling, and other charges for all invoice lines
Header tab: Invoice summary fields	
Invoice Date	The date the vendor specified for the invoice. Format is based on the settings at the *User Profile Configuration* screen.
Invoice Description	The description the vendor entered for the invoice. Informational only.
Other Description	A description of the additional charges on the invoice. Informational only.
Freight	The total freight amount at the header level of the invoice.
Handling	The total handling charge amount at the header level of the invoice.
Other Charge	The total "other" charge amount at the header level of the invoice.
Detail Freight	The total freight charges on all invoice detail lines. You can review the freight charges for an invoice detail line at the *Browse Invoice Detail* window, available by clicking the *Display* icon ( ) at the *Detail tab*.
Detail Handling	The total handling charges on all invoice detail lines. You can review the handling charges for an invoice detail line at the *Browse Invoice Detail* window, available by clicking the *Display* icon ( ) at the *Detail tab*.
Detail Other Charge	The total "other" charges on all invoice detail lines. You can review the "other" charges for an invoice detail line at the *Browse Invoice Detail* window, available by clicking the *Display* icon ( ) at the *Detail tab*.
Header tab: Payment Terms fields	Use these fields to review the payment terms, if any, the vendor has specified for the invoice. **Note:** The Vendor Portal does not validate the payment terms fields. For example, it does not confirm that the vendor enters a Discount Percent if specifying a Discount Days Due.
Discount Percent	The percentage discount to apply when paying the invoice within the *Discount Days Due*. Can include a 2-position decimal.

Fields	Description
Discount Days Due	The maximum number of days in which to pay the invoice in order to qualify for the *Discount Percent*. Up to 3 positions.
Gross Days	The number of days in which payment is due for the invoice. Up to 3 positions.
Detail tab	This tab displays information about the line(s) the vendor is billing on the invoice, and includes options to display additional information about the line(s). **Separate shipments?** Each shipment included in the invoice is listed separately, even if the shipments are for the same item on a purchase order. For example, if the vendor ships 3 units of item ABC123 separately for purchase order 456, all 3 shipments can be included on the invoice, and each unit is listed separately at the *Detail* tab, even if each of the fields described below (PO Number, PO Line #, Order Number, Item #, etc.) is the same. **Note:** If the vendor uploaded the invoice and consolidated multiple shipments for a PO line into a single DETAIL record with full shipped qty, then there is not a unique invoice_line_no for each shipment of the PO detail line.
PO Number	The number or code identifying the purchase order in the originating system. **Case:** If the originating system includes any lowercase letters in the purchase order number, Order Broker converts them to uppercase when creating the purchase order.
PO Line #	The original purchase order line number for the shipment.
Order Number	The number or code identifying the sales order in the originating system.
Item #	Your item number or code. Hold the pointer over the Item # to display a description of the item.
Shipped Date	The date when the shipment occurred. Format is based on the settings at the *User Profile Configuration* screen.
Invoice Qty	The total quantity included in the shipment and being billed on this invoice. Each shipment creates a separate invoice detail line, even if it is for the same purchase order detail line.
PO Unit Cost	The original unit cost from the purchase order.
Invoice Unit Cost	The unit cost the vendor is billing for the shipment. Multiplied by the Invoice Qty. If the cost entered by the vendor exceeds or falls short of the original PO Unit Cost by more than the *Unit Cost Threshold*, the invoice detail line is out-of-balance: for example, you set a threshold of 10%, and the vendor changed the unit price by 15%. The invoice remains in *Held* status until you either approve or reject it.
Balanced	The *out-of-balance* icon ( ) indicates if the invoice detail line is currently out-of-balance because the current Invoice Unit Cost> differs from the original PO Unit Cost by the *Unit Cost Threshold*.

Fields	Description
Display	Click the *Display* icon ( ) to advance to the Browse Invoice Detail window to review additional information about the invoice line.
PO Inquiry	Click the *PO Inquiry* icon ( ) to advance to the Purchase Order Inquiry screen, where you can review the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.
History tab	This tab displays an entry for each activity that occurs related to the invoice.
Action Type	Possible action types: • *Created* = The vendor created the invoice. • *Maintained* = The vendor maintained the invoice. • *Submitted* = The vendor submitted the invoice. • *Approved* = You approved an out-of-balance invoice, or it was approved automatically because it was not out-of-balance. • *Rejected* = You rejected an out-of-balance invoice. • *Posted* = The invoice posted to the originating system through the getDSInvoices messages. In this case, the User is *Admin* and the Source is *WS*.
Status	The status of the invoice as a result of the action. See the *Invoice Status*, above, for a listing of possible statuses.
Date / Time	The date and time when the action occurred. Format is based on the settings at the User Profile Configuration screen. The date and time can be the same for a series of actions when some of the actions take place automatically. For example, if you create an invoice that is not out-of-balance and it is submitted immediately, the Created, Submitted, and Posted actions can all have the same date and time.
User	The user ID of the person who performed the action. A user of *Admin* indicates that the action takes place automatically without user intervention.
Source	Possible sources are: • *UI* = The action took place at a screen. • *WS* = The action took place through a message sent automatically between two systems (the vendor posting the invoice to the retailer's system).

Fields	Description
Transaction Notes	Possible notes include: • *Invoice created* (Action Type = Created) • *Ready to Post* (Action Type = Submitted) • *Invoice Posted* (Action Type = Posted) • *Updated by Vendor* (Action Type = Maintained) • *Out of Balance. Submitted to Retailer for Approval* (Action Type = Submitted) • *Retailer Rejected - explanation*, where *explanation* is your note when rejecting the invoice (Action Type = Rejected) • *Retailer Approved - explanation*, where *explanation* is your note when approving the invoice at the *Approve Invoice* window (Action Type = Approved)

Browse Invoice Detail

Purpose: Use the **Browse Invoice Detail** window to review information about a detail line on an invoice.

How to display: Select the icon ( ) in the *Display* column at the *Detail tab* of the *Invoice* screen.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Invoice Inquiry* authority can display this window. See the *Role Wizard* for more information.

Fields at this window

Field	Description
PO Number	The number or code identifying the purchase order in the originating system. **Case:** If the originating system includes any lowercase letters in the purchase order number, Order Broker converts them to uppercase when creating the purchase order.
Order Number	The number or code identifying the sales order in the originating system.
PO Line #	The original purchase order line number for the shipment.
Item #	The code or number identifying the item. The description of the item follows, separated by a hyphen (-).
Vendor Item #	The vendor's item number or code. The vendor's description of the item follows, separated by a hyphen (-).
Shipped Date	The date when the shipment occurred, or the shipment date indicated by the vendor, if different. Format is based on the settings at the *User Profile Configuration* screen.

Field	Description
Invoice Qty	The total quantity included in a shipment and being billed on this invoice.
PO Unit Cost	The original unit cost from the purchase order.
Invoice Unit Cost	The unit cost the vendor is billing for the shipment. Multiplied by the Invoice Qty. **Different unit cost?** If the vendor specifies an invoice unit cost that exceeds or falls short of the original PO Unit Cost by more than the *Unit Cost Threshold* you have specified for the vendor, the invoice detail line is *out-of-balance*. For example, if you set the threshold at 10%, and the vendor changes the invoice unit cost (higher or lower) by more than 10%, the invoice detail line is out-of-balance. **Held invoice?** When the vendor submits an invoice that includes any *out-of-balance* lines, the invoice goes into *Held* status, and you need to either approve or reject the invoice. If you accept the invoice, it posts to the originating system. If you reject the invoice, the vendor can edit the invoice, including the Invoice Unit Cost, again, and resubmit the invoice; or the vendor can delete the invoice. **Email notification to vendor:** The vendor receives an email notification when you accept or reject an out-of-balance invoice if indicated by the *Invoice Balance Notification* setting at the *Email* folder of the *Preferences* tab of the *New Vendor* or **Edit Vendor** screen.
Extended Invoice Cost	The current Invoice Unit Cost * the Invoice Qty.
Freight	The total freight charge for this invoice detail line.
Handling	The total handling charge for this invoice detail line.
Other Charges	The total “other” charge for this invoice detail line.
Other Description	A message about the invoice detail line. Informational only.
Last Update	The last date and time when the vendor updated the invoice detail line. Not updated when you accept or reject an invoice. Format is based on the settings at the *User Profile Configuration* screen.

Approve Invoice

Purpose: Use this window to confirm approval of an *out-of-balance* invoice.

How to display: Click *Approve* at the *Invoice* screen when you are reviewing an invoice that is in *Held* status because it is out-of-balance.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Invoice Inquiry* and *Invoice Maintenance* authority can display this window. See the *Role Wizard* for more information.

Completing this window:

- Enter the reason for approving the invoice. This information is displayed to the vendor under invoice history in the Vendor Portal.

- Click *Save* to approve the invoice; otherwise, click *Cancel* to leave the invoice in *Held* status.

Updates: When you approve a held invoice:

- The invoice status changes to *Approved*, and then changes to *Posted* as soon as Order Broker receives the *getDSInvoices* request message from the originating system and includes the invoice in the *getDSInvoices* response message. This activity is tracked in invoice history; see the *History tab* of the *Invoice* screen.
- If indicated by your *Invoice Balance Notification* settings for the vendor at the *Email* folder of the *Preferences* tab on the *New Vendor* or **Edit Vendor** screen, Order Broker sends an email notification to the vendor that the invoice was approved. See the *Out-of-balance invoices approved or rejected notification email to vendor* for a sample.

Fields at this window

Field	Description
Invoice Number	The number or code assigned by the vendor to identify the invoice.
# of PO lines	The total number of shipments included in the invoice. An invoice can include multiple shipments for the same purchase order line, and can include lines from multiple purchase orders.
Reason	The reason for approving the invoice. This information is displayed to the vendor under invoice history in the Vendor Portal. Required.

Reject Invoice

Purpose: Use this window to confirm rejection of an *out-of-balance* invoice.

How to display: You can display this window by clicking *Reject* at the *Invoice* screen when you are reviewing an invoice in *Held* status because it is out-of-balance.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Invoice Inquiry* and *Invoice Maintenance* authority can display this window. See the *Role Wizard* for more information.

Completing this window:

- Enter the reason for rejecting the invoice. This information is displayed to the vendor under invoice history in the Vendor Portal.
- Click *Save* to reject the invoice; otherwise, click *Cancel* to leave the invoice in *Held* status.

Updates: When you reject a held invoice:

- The invoice status changes to *Rejected*. This activity is tracked in invoice history; see the *History tab* of the *Invoice* screen.
- If indicated by your *Invoice Balance Notification* settings for the vendor at the *Email* folder of the *Preferences* tab on the *New Vendor* or **Edit Vendor** screen, Order Broker sends an email notification to the vendor that the invoice was rejected. See the *Out-of-balance invoices approved or rejected notification email to vendor* for a sample.

The vendor can edit a rejected invoice and resubmit it, or the vendor can delete the invoice.

Fields at this window

Field	Description
Invoice Number	The number or code assigned by the vendor to identify the invoice.
# of PO lines	The total number of shipments included in the invoice. An invoice can include multiple shipments for the same purchase order line, and can include lines from multiple purchase orders.
Reason	The reason for rejecting the invoice. This information is displayed to the vendor under invoice history in the Vendor Portal. Required.

9
Products Menu

Used for the Routing Engine module.

- *Products*: Used for the Routing Engine module.
  - *New Product*: Used for the Routing Engine module.
  - *Edit Product*: Used for the Routing Engine module.
  - *System Products*: Used for the Routing Engine module.
    - *Edit System Product*: Used for the Routing Engine module.
  - *Product Locations*: Used for the Routing Engine module.
    - *New Product Location*: Used for the Routing Engine module.
    - *Edit Product Location*: Used for the Routing Engine module.
    - *Browse Product Locations*: Used for the Routing Engine module.
  - *Product Attributes*: Used for the Routing Engine module.
    - *New Product Attribute*: Used for the Routing Engine module.
    - *Edit Product Attribute*: Used for the Routing Engine module.
  - *UPC*: Used for the Routing Engine module.
    - *Edit UPC*: Used for the Routing Engine module.
- *Probability Rules*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Calculations*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Probability Rule Wizard*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Browse Probability Rules*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Probability Location*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Probable Quantity Rules*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *New Probable Quantity Rule*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Edit Probable Quantity Rule*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Probable Quantity Location*: Available if Use Routing Engine is selected at the *Tenant* screen.

Products

Purpose: Use the **Products** screen to review or work with products, or items, in the **Order Broker** database. Products in the database are visible in locate items searches conducted from an integrated system, such as Order Management System or Xstore.

Used for the Routing Engine module.

Product relationships: See *Product, System Product and Product Location* for an overview of the relationships among **Order Broker** elements, including products.

How to display this screen: Select *Products* from the *Home Screen* or from the *Products Menu*.

> **Note:**
>
> Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.

How are products created in the Order Broker database?

Typically, you create products through a product import integration with your external system of record. The process you use to download products from an integrated system varies based on the integration. See *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for an overview.

> **Important:**
>
> You should not normally create products by completing the entry fields at the top of the **Products** screen. Instead, you should always create and update product and related information through import from the external systems (such as **Order Management System** or **Xstore**. See *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for background.

Options at this screen

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>create a product
Note: Normally, you should not create products using this method. By creating a product in Order Broker directly rather than using the process described under Importing Items/ Products, Inventory, Barcodes, and Locations into the Database, you run the risk that product information will be inconsistent with that in the external systems, such as Order Management System or Xstore.</td><td>1. Optionally, select a different organization from the Organization drop-down box. The organization associated with your Default Shipping System is selected by default. See Data Hierarchy for more information on how products are integrated within organizations.
Note:You must complete the Preferences screen for an organization before you can select it from the drop-down box.
2. Optionally, enter a product code in the Product field. Product codes can be 1 to 35 positions in length, and must be unique within the organization. If you do not enter a product code here, you can enter it at the New Product screen.
3. Optionally, enter a name in the Name field. Names can be 1 to 40 positions in length. If you do not enter a name here, you can enter it at the New Product screen.
4. Optionally, enter a master style in the Master Style field. Master styles can be 1 to 35 positions in length. This is an optional field.
5. Click New. If:
• the product already exists in the organization, Order Broker displays an error message.
– your entries were valid, you advance to the New Product screen, where you can complete the creation of the product.
Note: If you click Cancel after advancing to the New Product screen, the product is not created.</td></tr>
</table>

Option	Procedure
search for a product	When you first advance to this screen, no products are displayed. The *organization* associated with your *Default Shipping System* is selected by default. Click *Search* to retrieve the first 50 products in your organization, or use any combination of the fields at the top of the screen to restrict the search results to matching products: • Select a different *organization* from the from the *Organization* drop-down box to restrict your results to this organization. You can also select a blank organization to remove this field from your selection criteria. • Enter a full or partial product code in the *Product* field to restrict your results to product codes starting with your entry. • Enter a full or partial system product code in the *System Product* field to restrict your results to product codes that have any system products starting with your entry. The system product code itself is not displayed with the search results. • Enter a full or partial name in the *Name* field to restrict your results to products whose names contain your entry. • Enter a full or partial master style in the *Master Style* field to restrict your results to products whose master styles start with your entry. • Click *Search*. **Case?** All the enterable fields on this screen are case-insensitive for searching; for example, an entry of `a` or `A` matches a product code of `ABC1234`.
select a product for review or maintenance	Click the edit icon ( ) next to a product to advance to the *Edit Product* screen. **Note:** If the *Edit Product* screen is already open in another tab, you advance to that screen, with the previously-selected product displayed.
delete a product	Click the delete icon ( ) next to a product to delete the product from Order Broker. **Note:** You can delete a product only if there is not an existing system product or product location for the product; however, if there are no system product or product location records, any existing product UPC codes or product attributes are deleted. You might need to delete a product if it was created inadvertently in the default system and later deleted there. For example, this situation can occur if you inadvertently generated extra SKU's of an item in Order Management System. In this situation, deleting the product in Order Broker is necessary because deleting the SKU in Order Management System does not automatically delete the product in Order Broker.
advance to the System Products screen	Click the systems icon ( ) next to a product. **Note:**If the *System Products* screen is already open in another tab, you advance to that screen, with the system products for the previously-selected product displayed.

Option	Procedure
advance to the Product Locations screen	Click the locations icon ( ) next to a product. **Note:** If the *Product Locations* screen is already open in another tab, you advance to that screen, with the product locations for the previously-selected product displayed.
advance to the Product Attributes screen	Click the attributes icon ( ) next to a product. **Note:** If the *Product Attributes* screen is already open in another tab, you advance to that screen, with the product attributes for the previously-selected product displayed.
advance to the UPC screen	Click the UPC icon ( ) next to a product. **Note:** If the *UPC* screen is already open in another tab, you advance to that screen, with the UPC barcodes for the previously-selected product displayed.

Fields at this screen

Field	Description
Search/new fields:	
Organization	See *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.
Product	See *product*. Product codes can be 1 to 35 positions in length. Enter a full or partial product code and select *Search* to display products whose codes start with your entry. Not case-sensitive for searching; an entry of `A` or `a` matches a product code of `A12345`.
System Product	See *system product*. System product codes can be 1 to 35 positions in length. Enter a full or partial system product code and select *Search* to display products that have any system product codes that start with your entry. The system product code itself is not displayed with the search results. Not case-sensitive for searching; an entry of `A` or `a` matches a product code of `A12345`.
Name	The *Name* of a product. Product names can be 1 to 40 positions in length. Enter a full or partial name and select *Search* to display products whose names start with your entry. Not case-sensitive for searching; an entry of `A` or `a` matches a product name of `Arabica Coffee Beans`.
Master Style	See *master style*. Master styles can be 1 to 35 positions in length. Enter a full or partial master style and select *Search* to display products whose master styles start with your entry. Not case-sensitive for searching; an entry of `A` or `a` matches a master style of `A12345`.
Results fields:	
Organization	See *organization*.
Product	See *product*.

Field	Description
Name	The *Name* of a product.
Master Style	See *master style*.
Systems	Select the systems icon ( ) next to a product to advance to the *System Products* screen. **Note:** If the *System Products* screen is already open in another tab, you advance to that screen, with the system products for the previously-selected product displayed.
Locations	Select the locations icon ( ) next to a product to advance to the *Product Locations* screen. **Note:** If the *Product Locations* screen is already open in another tab, you advance to that screen, with the product locations for the previously-selected product displayed.
Attributes	Select the attributes icon ( ) next to a product to advance to the *Product Attributes* screen. **Note:** If the *Product Attributes* screen is already open in another tab, you advance to that screen, with the product attributes for the previously-selected product displayed.
UPC	Select the UPC icon ( ) next to a product to advance to the *UPC* screen. **Note:** If the *UPC* screen is already open in another tab, you advance to that screen, with the UPC barcodes for the previously-selected product displayed.
Edit	Select the edit icon ( ) next to a product to advance to the *Edit Product* screen. **Note:** If the *Edit Product* screen is already open in another tab, you advance to that screen, with the previously-selected product displayed.
Delete	Select the delete icon ( ) next to a product to delete the product from *Order Broker*. **Note:** You can delete a product only if there is not an existing system product or product location for the product; however, if there are no system product or product location records, any existing product UPC codes or product attributes are deleted.

New Product

Purpose: Use the **New Product** screen to work with a *product* or review the date and time when it was last updated.

Used for the Routing Engine module.

Product relationships: See *Product, System Product and Product Location* for an overview of the relationships among **Order Broker** elements, including products. Also, see the *Products* screen for more information on how products are created in Order Broker.

How to display this screen: Begin the entry of a new product at the *Products* screen and click *New*.

> **Note:**
>
> Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.

Completing entry of a product

Update any of the fields described below and click *Save*, or click *Cancel* to return to the *Products* screen without saving the new product. The *Organization*, *Product*, and *Name* fields are required.

> **Note:**
>
> Any changes you make at this screen can be overwritten the next time you import product information, as described in *Importing Items/Products, Inventory, Barcodes, and Locations into the Database*.

Fields at this screen

Field	Description
Organization	See *organization*. The organization code is separated from the organization description by a hyphen (-). Required.
Product	The product code can be 1 to 35 positions long, and must be unique in your organization. See *product* for more information. Required.
Product fields:	
Name	The *Name* of a product. Product names can be 1 to 40 positions in length. Required.
Master Style	See *master style*. Optional. **Note:** Normally, you would never change the master style for a product in Order Broker.
Image URL	The URL of the product image to display in Store Connect. Up to 255 positions. Optional. Must be a validly formatted URL, such as `https://www.example.com/folder/image.png`, where: • `http` or `https` is the protocol • `www.example.com` is the domain or server name • `folder` is a folder or subfolder where the image is found • `image.png` or `image.jpg` is the name of the image The screen does not validate that an image is found at the specified URL.
Classification fields:	

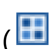
Field	Description
Department	The description of the product's department. The department description can be 1 to 40 positions in length, and is informational only. Optional. **Order Management System integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Department. Long SKU departments are used to identify items within a retail hierarchy.
Class	The description of the product's class. The class description can be 1 to 40 positions in length, and is informational only. Optional. **Order Management System integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Class. Taken from the base item rather than the SKU if this is a SKU'd item. Long SKU classes can be used together with long SKU departments to identify items within a retail hierarchy.
Category	The description of the product's category. The Category description can be 1 to 40 positions in length, and is informational only. Optional. **Order Management System integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Division. Long SKU divisions can be used together with long SKU departments and classes to identify items within a retail hierarchy.

Edit Product

Purpose: Use the **Edit Product** screen to work with an existing *product* or review the date and time when it was last updated.

Used for the Routing Engine module.

Product relationships: See *Product, System Product and Product Location* for an overview of the relationships among **Order Broker** elements, including products. Also, see the *Products* screen for more information on how products are created in Order Broker.

How to display this screen: Click the edit icon () for an existing product at the *Products* screen.

Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.

If the **Edit Product** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previously-selected product displayed.

Updating a product: Update any of the fields described below and click *Save*, or click *Cancel* to return to the *Products* screen without making any changes.

> **Note:**
>
> Any changes you make at this screen can be overwritten the next time you import product information, as described in *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database*.

Fields at this screen

Field	Description
Organization	See *organization*.
Product	See *product*.
Product fields:	
Name	The *Name* of a product. Product names can be 1 to 40 positions in length. Required.
Master Style	See *master style*. Optional field. **Note:** Normally, you would never change the master style for a product in Order Broker.
Image URL	The URL of the product image to display in Store Connect. Up to 255 positions. Optional. Must be a validly formatted URL, such as `https://www.example.com/folder/image.png`, where: • `http` or `https` is the protocol • `www.example.com` is the domain or server name • `folder` is a folder or subfolder where the image is found • `image.png` or `image.jpg` is the name of the image The screen does not validate that an image is found at the specified URL.
Classification fields:	
Department	The description of the product's department. The department description can be 1 to 40 positions in length, and is informational only. Optional. **Order Management System integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Department. Long SKU departments are used to identify items within a retail hierarchy.
Class	The description of the product's class. The class description can be 1 to 40 positions in length, and is informational only. Optional. **Order Management System integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Class. Taken from the base item rather than the SKU if this is a SKU'd item. Long SKU classes can be used together with long SKU departments to identify items within a retail hierarchy.

Field	Description
Category	The description of the product's category. The Category description can be 1 to 40 positions in length, and is informational only. Optional. **Order Management System integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Division. Long SKU divisions can be used together with long SKU departments and classes to identify items within a retail hierarchy.
Last updated fields:	
Date	The last date and time when the product was updated, either through the product import process or interactively. Display-only.

System Products

Purpose: Use the **System Products** screen to review or work with existing *system product*s, or create a new one.

Used for the Routing Engine module.

What is a system product? A system product is an identification of a product within a particular *system* that integrates with Order Broker.

Created how? A system product is created for a product when you import items or products from an external system, such as *OCDS or Merchandising Omni Services*, **Order Management System**, or **Xstore**. See *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for an overview.

Product relationships: See *Product, System Product and Product Location* for an overview of the relationships among **Order Broker** elements, including system products.

How to display this screen: Click the system product icon ( ) next to a product at the *Products* screen.

Note:

- Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.
- If the **System Products** screen was already open in another tab when you clicked the system product icon, you advance to this screen with the system products for the previously-selected product displayed.

Options at this screen

Option	Procedure
create a system product **Note:** Normally, you should not create system products using this method. By creating a system product in **Order Broker** directly rather than using the process described under *Importing Items/Products, Inventory, Barcodes, and Locations into the Database*, you run the risk that system product information will be inconsistent with that in the external system, such as Order Management System or Xstore.	1. Select a *system* from the from the *System* drop-down box. Only systems within the product's *organization* are available for selection. 2. Enter a system product code in the *System Product* field. The system product code can be from 1 to 35 positions long. System products need to be unique within a system, but the same system product code can be assigned across multiple systems. For example, you cannot have more than 1 system product for `AB123` in system 2, but you can have system product `AB123` in systems 2, 3, and 4. 3. Optionally, enter a *master style* in the *Master Style* field. The master style can be from 1 to 35 positions long. 4. Click *New*. If: • there is already a system product for this product and system, Order Broker clears your entries from the screen and positions the results fields to the existing product. • there is already a system product for a different product in the selected system, Order Broker displays a message indicating that the product already exists. You cannot assign the same system product code for the same system to multiple products. • you did not enter a system product code, Order Broker displays an error message. • the system product was created successfully, Order Broker adds it to the results fields.
search for a system product	Use any combination of the fields at the top of the screen to restrict the search results to matching products: • Select a *system* from the from the *System* drop-down box to restrict your results to this system. Only systems within the product's *organization* are available for selection. **Note:**You can select a blank system to remove this field from your selection criteria. • Enter a full or partial system product code in the *System Product* field to restrict your results to system product codes starting with your entry. • Enter a full or partial master style in the *Master Style* field to restrict your results to system products whose master styles start with your entry. • Click *Search*. **Case?** Both the enterable fields on this screen are case-sensitive for searching; for example, an entry of `a` does not match a system product code of `ABC123`.

Option	Procedure
change the master style for a system product **Note:** Normally, you should never need to change the master style for a system product. Doing so might make the information in Order Broker inconsistent with the related information in the remote system.	Select the edit icon ( ) next to a system product to open the *Edit System Product* window.
delete a system product	Select the delete icon ( ) next to a system product to delete the system product from *Order Broker*. This option is available only if there is not an existing product location for the *system* and *product*. You might need to delete a system product if it was created inadvertently in the system and later deleted there. In this situation, deleting the system product in Order Broker is necessary because deleting the product in the remote system does not automatically delete the system product in Order Broker.

Fields at this screen

Field	Description
Informational fields:	
Organization	The *organization* code and name are separated by a hyphen (-).
Product	The *product* code and name are separated by a hyphen (-).
Search/new fields:	
System	*Creating a system product:* Select a *system* from the from the *System* drop-down box. Required to create a system product. *Searching for a system product:* Optionally, select a *system* from the from the *System* drop-down box to restrict your results to this system. Only systems within the product's *organization* are available for selection.
System Product	*Creating a system product:* Enter the *system product* code to create. Required to create a system product. The system product code can be from 1 to 35 positions long. *Searching for a system product:* Optionally, enter a full or partial *system product* code. Case-sensitive for searching; an entry of `a` does not match a system product code of `A12345`.
Master Style	*Creating a system product:* Optionally, enter a *master style*. The master style can be from 1 to 35 positions long. *Searching for a system product:* Optionally, enter a full or partial *master style*. Case-sensitive for searching; an entry of `a` does not match a master style of `A12345`.
Results fields:	
System	See *system*.

Field	Description
System Product	See *system product*.
Master Style	See *master style*.
Edit	Select the edit icon ( ) next to a system product to open the *Edit System Product* window.
Delete	Select the delete icon ( ) next to a system product to delete the system product from *Order Broker*. This option is available only if there is not an existing product location for the *system* and *product*.

Edit System Product

Purpose: Use the **Edit System Product** window to change the *master style* of an existing *system product*.

Used for the Routing Engine module.

For more information: See the *System Products* screen.

How to display this window: Click the edit icon ( ) at the *System Products* screen.

> **Note:**
>
> Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.

Fields at this screen

Field	Description
Informational fields:	All the following fields except for the Master Style are display-only.
Organization	The *organization* code and name are separated by a hyphen (-).
Product	The *product* code and name are separated by a hyphen (-).
System	The *system* code is displayed.
System Product	The *system product* code is displayed.
Master Style	Enter a new *master style* and click *Save*. The master style can be from 1 to 35 positions long.

Product Locations

Purpose: Use the **Product Locations** screen to review or work with existing *product locations*, or create a new one.

Used for the Routing Engine module. Not used by the Supplier Direct Fulfillment module.

What is a product location? A product location is a record of a product at a location where it is stocked or sold. For example, an item warehouse record in your order management system corresponds to a product location. Order Broker keeps track of availability information for the product location, including the available quantity and the date and expected quantity of any open purchase orders. The availability information is displayed at the *Edit Product Location* screen.

Created how? Typically, you create product locations through an integration with an external system. For example, product locations are created as part of the product import process or based on the results of an *inventory inquiry*. You can also create product locations through the *availability update request* or *product update request*, as well as through *OCDS or Merchandising Omni Services Imports*.

> **Note:**
>
> A *system product* must first exist for the product and system owning the selected location before you can create a product location. For example, if product AB123 does not exist in system 10, then you cannot create a product location for AB123 in system 10's warehouse 1.

Available quantity updated when? For an *offline system*, the available quantity is updated only when you perform the product import process from the system, or through the *availability update request* or *product update request*. For an *online system*, Order Broker updates the available quantity for the product location when it receives a response to an *inventory inquiry*. Typically, inventory levels in the Order Broker database are updated daily, or whenever scheduled by your systems administrator.

The available quantity is also updated through the *OCDS or Merchandising Omni Services Imports*.

Product relationships: See *Product, System Product and Product Location* for an overview of the relationships among **Order Broker** elements, including product locations.

How to display this screen: Click the product location icon ( ) next to a product at the *Products* screen.

> **Note:**
>
> - Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.
> - If the **Product Locations** screen was already open in another tab when you clicked the product location icon, you advance to this screen with the product locations for the previously-selected product displayed.

Options at this screen

Option	Procedure
create a product location **Note:** Normally, you should not create product locations using this method. By creating a product location in Order Broker directly rather than using the process described under *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database*, you run the risk that product location information will be inconsistent with that in the external system, such as Order Management System or Xstore.	1. Optionally, select a *location type* from the *Type* drop-down box to restrict the list of locations to this type. Only location types that have been created in the product's *organization* are available for selection. 2. Enter a valid *location* in the *Location* field. As you enter characters in the *Location* field, it displays locations that match your entry, and you can select a location. 3. Click *New*. If: • the product location already exists, or if your entry in the *Location* field is not valid, Order Broker displays an error message. • a *system product* does not already exist for this product and the system owning the location, Order Broker displays an error message. See *Data Hierarchy* for more information. • your entries were valid, you advance to the *New Product Location* screen, where you can enter information about availability and complete the creation of the product location. **Note:** If you click *Cancel* at the *New Product Location* screen, the product location is not created.
search for a product location	Use 1 or both of the fields at the top of the screen to restrict the search results to matching product locations: • Select a *location type* from the *Type* drop-down box and click *Search* to restrict your results to this location type. **Note:** You can select a blank location type to remove this field from your selection criteria. • Enter a full or partial *location* in the *Location* field and click *Search* to find product locations that match your entry.
select a product location for review or maintenance of availability information	Click the edit icon ( ) next to product location to advance to the *Edit Product Location* screen. **Note:** If the *Edit Product Location* screen is already open in another tab, you advance to that screen, where the previously-selected product location is displayed.
delete a product location	Select the delete icon ( ) next to a product location to delete the product location from Order Broker. You might need to delete a product location if it was deleted in the remote system. For example, if you transfer all the inventory for an item from one warehouse in Order Management System to another, this does not automatically delete the product location in Order Broker. **Note:** You cannot delete a product location unless the available quantity, reserved quantity, and fulfilled quantity are all zero.
browse product locations	Double-click a product location to open the *Browse Product Locations* window, where you can review the availability information, attributes, and other information about a product location.

Fields at this screen

Field	Description
Informational fields:	
Organization	See *organization*. The organization code is separated from the organization description by a hyphen (-).
Product	See *product*. The product you selected at the *Products* screen. The product code is separated from the product name by a hyphen (-).
Type	Optionally, select a *location type* from the *Type* drop-down box to restrict the list of locations to this type. Only location types that have been created in the product's *organization* are available for selection.
Search/New fields:	
Location	*Searching for a location:* enter a full or partial *location* in the *Location* field and click *Search* to display product locations that match your entry. *Creating a location:* enter a valid *location* in the *Location* field and click *New* to create the product location. As you enter characters in the *Location* field, it displays locations that match your entry, and you can select a location. Required when creating. See *create a product location*, above, for more information. See *location* for background. The location code and the location name are separated by a hyphen (-).
Search Results fields:	
Type	See *location type*.
Location	See *location*. The location code and the location name are separated by a hyphen (-).
System	The *system* associated with the system product and location.
System Product	The *system product* associated with the system and location.
Edit	Select the edit icon ( ) to advance to the *Edit Product Location* screen, where you can review and work with availability information and see when the information was most recently updated. **Note:** If the *Edit Product Location* screen is already open in another tab, you advance to that screen, where the previously-selected product location is displayed.
Delete	Select the delete icon ( ) to delete the product location from Order Broker.

New Product Location

Purpose: Use the **New Product Location** screen to complete entry of a *product location* and to enter availability information.

> **Note:**
>
> Typically, you create product locations through integrations with external systems. For example, product locations might be created as part of the product import process or based on the results of an *inventory inquiry*.

Used for the Routing Engine module.

How to display this screen: Select a location and click *New* at the *Product Locations* screen.

> **Note:**
>
> Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.

Completing the creation of a product location: Update any of the fields described below and click *Save*, or click *Cancel* to return to the *Product Locations* screen without creating the product location.

> **Note:**
>
> Any changes you make at this screen can be overwritten the next time you import product location information, as described in *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database*.

Fields at this screen

Field	Description
Informational fields:	
Organization	The *organization* code and name are separated by a hyphen (-).
System Product	The *system product* code and name are separated by a hyphen (-).
Location	The *location* code and name are separated by a hyphen (-).

Field	Description
Availability fields:	**Order Management System integration:** The availability calculation in Order Management System is: `On hand - Protected - Reserved - Reserve Transfer - Backordered = Quantity available` **Note:** It is important to run the Batch Purchase Order Layering program (*BPOL*) in Order Management System before scheduling periodic import of inventory information into Order Broker. See the Order Management System online help for more information.
Available Quantity	The quantity of the product available in this location. This information can by updated through integration with an external system, or by entry at this screen. Order Broker uses this quantity to calculate the *Available to Promise* if: • the location is in an *offline system*, or • the location is in an *online system*, but Order Broker cannot communicate with the system when it receives an *inventory inquiry*, and the *No Offline Response Action* setting at the *Preferences* screen is *Use offline*. **Note:** The available quantity is a maximum of 6 positions, and can be a negative number. It cannot include decimals. **For more information:** See the *Available to Promise* field at the *Edit Product Location* screen for a discussion.
Reserved Quantity	Not implemented at the **New Product Location** screen. See the *Reserved Quantity* at the *Edit Product Location* screen for a discussion.
Fulfilled Quantity	Not implemented on this screen. See the *Fulfilled Quantity* at the *Edit Product Location* screen for a discussion.
Available to Promise	The *Available Quantity* minus the *Reserved Quantity* and the *Fulfilled Quantity*, if any, for the product location. This field is not implemented at the **New Product Location** screen. See the *Calculating the Available to Promise Quantity* for a discussion.
Next PO Date	The next date when a purchase order for this product is expected for delivery. **Order Management System integration:** The date is calculated using purchase order layering, in which the expected quantity on a purchase order may be “reserved” for older backorders. See the Order Management System online help for more information.
Next PO Quantity	The number of units ordered on the next purchase order. This quantity can be up to 6 positions. It cannot include decimals.

Field	Description
Attributes	The following product attributes are available to guide selection of fulfilling or sourcing locations for orders: • probability rules: See the *Probability Rule Wizard* for more information • *standard brokering*: optionally, the Routing Engine can use the Sales Velocity for ranking • *weighted brokering*: the Science Engine can use various product location attributes based on the configured weighted brokering percentages Each of the product attributes are user-defined.
Daily Sell Through Quantity	Typically represents the average quantity of the product sold in this location on a daily basis. You might use this quantity as part of a probability rule that subtracts the daily sell-through quantity from the available quantity, especially if the location is in an *offline system*. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number.
Status	The status of the product in this location. You might use the status as part of a probability rule that excludes discontinued products. Possible statuses are: • Active (default) = Can be ordered. • Inactive = Cannot currently be ordered. • Discontinued = Can still be ordered, but will be inactive at some point in the future. Required.
Sell Quantity/ Multiple	Typically represents the selling multiple for a product; for example, you might sell tires in quantities of 4. You might use this quantity as part of a probability rule that indicates to exclude a product location, or display an available quantity of 0, if the available quantity is lower than the sell quantity/multiple. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number. You might also use the Minimum Sell Quantity to fulfill the same function.
On Clearance	Indicates whether the product is on clearance in this location: • Selected = The product is on clearance. • Unselected (default) = The product is not on clearance. You might use this setting as part of a probability rule that reduces the quantity that is expected to be available to fulfill orders. Used in *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. If you use *LocateItems Sequence and Splitting Examples (Standard Brokering)* and this flag is selected, the Science Engine uses a selling price of .01 to calculate margin.
Minimum Sell Quantity	See the Sell Quantity/Multiple, above. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number.

Field	Description
Selling Price	The single-unit selling price of the product in this location. Can be up to 19 positions with a 4-position decimal. It can also be 0, but cannot be a negative number, and should not include a currency symbol. Optional, but should be specified if Gross Margin is used in the *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. You might use the selling price in a probability rule to exclude lower-priced items.
Shrink Rate %	Typically represents the percentage loss experienced for the product in this location due to theft or breakage. You might use the shrink rate as part of a probability rule that reduces the available quantity by the shrink rate percentage. This percentage can be up to 2 positions, and must be a whole number. It cannot be a negative number.
Cost	The single-unit cost of the product in this location. Can be up to 19 positions with a 4-position decimal. It can also be 0, but cannot be a negative number, and should not include a currency symbol. Optional, but should be specified if Gross Margin is used in the *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. You might use the cost in a probability rule to exclude higher-cost items.
Sales Velocity	A numeric ranking you can use to indicate how well a product sells in a particular location. You can use the sales velocity ranks assigned to product locations as part of the criteria for selecting fulfilling or sourcing locations for orders, either through standard or weighted brokering. Numeric; 2 positions with an optional 2-position decimal. Can be blank, or any number from 0 to 99.99. See the Standard Brokering or Weighted Brokering tabs at the *Preferences* screen for more information.
Margin	The Selling Price minus the Cost. If no Cost is specified, the Margin is equal to the Selling Price. If a Cost is specified, but no Selling Price, the Margin is negative. If no Cost or Margin is specified or if you set them to 0, the Margin is blank or 0.0000. System-calculated when either the Selling Price or Cost is entered. Display-only.

Browse Product Locations

Purpose: Use the **Browse Product Locations** window to review availability information for a *product location*, or to check the last time this information was updated.

Used for the Routing Engine module.

Product relationships: See *Product, System Product and Product Location* for an overview of the relationships among **Order Broker** elements, including product locations. Also, see the *Product Locations* screen for more information on how product locations are created in Order Broker.

Updated how? The availability information displayed at this screen can be updated by:

- a periodic refresh from an external system (such as product import processing from the order management system)
- entry at the *Edit Product Location* screen
- the *Fulfilled Inventory Export*

- the *availability update request*
- the *product update request*
- an on-demand refresh triggered by a *locate items* search or *product availability search* for an *online system*
- *OCDS or Merchandising Omni Services Imports*

Order Broker uses the availability information displayed here to select a fulfilling location, or sourcing location for a ship-for-pickup order, when:

- the location is in an *offline system*, or
- the location is in an *online system*, but the Order Broker cannot communicate with the system and the *No Offline Response Action* setting at the *Preferences* screen is *Use offline*

Systems that use purchase order layering: The Next PO date and quantity listed might not reflect the date and quantity on the next open purchase order for a product if you integrate with a system such as Order Management System, which uses purchase order layering. In purchase order layering, the system accounts for the total quantity backordered to determine which purchase order might be able to fulfill a new order for the product. For example, the backorder quantity for a product is 115. There are 2 open purchase orders for the item, each with an order quantity of 100. Purchase order layering uses the date of the second purchase order as the Next PO Date since the full order quantity of the first purchase order is already fully committed to prior backorders. Also, it reports that the Next PO Quantity is 85, since the first 15 on the second purchase order is also already committed.

> **Note:**
>
> It is important to run the Batch Purchase Order Layering program (*BPOL*) in Order Management System before importing inventory information into Order Broker.

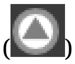
About attributes: The product attributes (*Daily Sell Through Quantity*, *Sell Quantity/Multiple*, *Minimum Sell Quantity*, *Shrink Rate %*, and *Sales Velocity*) are metrics that you can define for a product location in order to use them in probability rules. For example, you might want to display an available quantity of 0 if the actual available quantity is not more than the daily sell-through quantity for an off-line location. You can also have the Routing Engine use the Sales Velocity for product location ranking.

Additional attributes (*Status*, *On Clearance*, *Selling Price*, *Cost*, and *Margin*) can be used as part of *LocateItems Sequence and Splitting Examples (Standard Brokering)*.

How to display this window: Click to highlight a product location at the *Product Locations* screen.

> **Note:**
>
> Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.

Options at this window

Option	Procedure
review the next product location	Click the next icon () to display the next product location.
review the previous product location	Click the previous icon () next to display the previous product location.
edit the current product location	Select *Edit* to advance to the *Edit Product Location* screen.

Fields at this window

> **Note:**
>
> All fields at this window are display-only.

Field	Description
Informational fields:	
Location	The *location* code and name are separated by a hyphen (-).
System Product	The *system product* code. The name is not displayed.
Type	The *location type* code. The name is not displayed.
System	The *system* code and name are separated by a hyphen (-).
Availability fields	

Field	Description
Available Quantity	The quantity of the product available in this location as of the most recent update, before subtracting the *Reserved Quantity* and any *Fulfilled Quantity*, or applying any probability rules. This information can by updated through: • a periodic refresh from an external system (such as product import processing from the order management system) • entry at the *Edit Product Location* screen • the *Fulfilled Inventory Export* • the *availability update request* • the *product update request* • an on-demand refresh triggered by a *locate items* search or *product availability search* for an *online system* • interactive updates to product locations through the Retail Integration Bus (RIB) when *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services* is implemented. This information originates in Oracle Retail Merchandising Foundation Cloud Service (RMFCS). See the discussion above under *Browse Product Locations* for more information. Up to 6 positions, and can be a negative number. Order Broker uses this quantity to calculate the *Available to Promise* unless it receives an update from an *online system*. **Probability rules:** Probability rules use the *Available to Promise* in tests, calculations, and results. See *Probability Rule Wizard* for background.
Reserved Quantity	The quantity on all order lines assigned to this product location that are in a status indicating the inventory is reserved for existing orders. The reserved quantity and any fulfilled quantity are subtracted from the *Available Quantity* to determine the *Available to Promise* quantity. Up to 6 positions. You can use the *System* screen to select the statuses that indicate an order line is reserved. In the case of ship-for-pickup orders, the reserved quantity is updated at the sourcing location. The reserved quantity displayed here is 0 if there are no order lines in a selected status assigned to this product location. **For more information:** See the *Reservation tab* at the System screen for information on selecting reserved statuses, and see *Calculating the Available to Promise Quantity* for an overview.

Field	Description
Fulfilled Quantity	The quantity that has been fulfilled on delivery or pickup orders, or put in transit for ship-for-pickup orders, since the last fulfilled quantity export to the system, or inventory import from the system. The reserved quantity and any fulfilled quantity are subtracted from the *Available Quantity* to determine the *Available to Promise* quantity. Up to 6 positions. In the case of ship-for-pickup orders, the fulfilled quantity is increased at the sourcing location when the pickup location changes the status to fulfilled. *Tracked when?* The *Track Fulfilled Quantity* field at the *System* screen controls whether to track the fulfilled quantity and, if so, when to reset it. **For more information:** See the *Track Fulfilled Quantity* field for a discussion of how the fulfilled quantity is tracked, and see *Calculating the Available to Promise Quantity* for an overview.
Available to Promise	*Used for:* The quantity for the system to use when determining the available quantity to return in the LocateItems response and the *product availability search*, and to evaluate locations for order assignment. Up to 6 positions, and can be a negative number. *Calculation:* Calculated by subtracting the *Reserved Quantity* and any *Fulfilled Quantity* from the *Available Quantity* for the product location. When you update the *Available Quantity* at this screen and press the *tab* key, the screen updates the Available to Promise quantity based on your entry. **Probability rules:** If a probability rule applies to the product location, it is calculated based on this quantity. **For more information:** See *Calculating the Available to Promise Quantity* for an overview.
Next PO date	The next date when a purchase order for this product is expected for delivery. **Order Management System integration:** The date is calculated using purchase order layering, in which the expected quantity on a purchase order may be “reserved” for older backorders. This information is not updated automatically from Order Management System each time you enter or maintain a purchase order. Some other activity, such as a change to the available quantity above or below the specified threshold, is required to trigger an update from Order Management System to Order Broker. See the Order Management System online help for more information.
Next PO Quantity	The number of units ordered on the next purchase order. This quantity can be up to 6 positions. It cannot include decimals. **Order Management System integration:** This information is not updated automatically from Order Management System each time you enter or maintain a purchase order. Some other activity, such as a change to the available quantity above or below the specified threshold, is required to trigger an update from Order Management System to Order Broker.

Field	Description
Last Updated	The last date and time when this product location was updated through the product and inventory import process, *Fulfilled Inventory Export*, *inventory inquiry*, or interactively at this screen. Up to 6 positions. Not updated when Order Broker updates the *Reserved Quantity* or the *Fulfilled Quantity*.
Attributes	The following product attributes are available to guide selection of fulfilling or sourcing locations for orders: • probability rules: See the *Probability Rule Wizard* for more information • *standard brokering*: the Routing Engine can use the Sales Velocity for ranking • *weighted brokering*: the Science Engine can use various product location attributes based on the configured weighted brokering percentages Each of the product attributes are user-defined.
Daily Sell Through Quantity	Typically represents the average quantity of the product sold in this location on a daily basis. You might use this quantity as part of a probability rule that subtracts the daily sell-through quantity from the available quantity, especially if the location is in an *offline system*. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number.
Status	The status of the product in this location. You might use the status as part of a probability rule that excludes discontinued products. Possible statuses are: • Active (default) = Can be ordered. • Inactive = Cannot currently be ordered. • Discontinued = Can still be ordered, but will be inactive at some point in the future.
Sell Quantity/ Multiple	Typically represents the selling multiple for a product; for example, you might sell tires in quantities of 4. You might use this quantity as part of a probability rule that indicates to exclude a product location, or display an available quantity of 0, if the available quantity is lower than the sell quantity/multiple. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number. You might also use the Minimum Sell Quantity to fulfill the same function.
On Clearance	Indicates whether the product is on clearance in this location: • Selected = The product is on clearance. • Unselected (default) = The product is not on clearance. You might use this setting as part of a probability rule that reduces the quantity that is expected to be available to fulfill orders. Used in *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. If you use *LocateItems Sequence and Splitting Examples (Standard Brokering)* and this flag is selected, the Science Engine uses a selling price of .01 to calculate margin.

Field	Description
Minimum Sell Quantity	See the Sell Quantity/Multiple, above. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number.
Selling Price	The single-unit selling price of the product in this location. Can be up to 19 positions with a 4-position decimal. It can also be 0, but cannot be a negative number, and should not include a currency symbol. Optional, but should be specified if Gross Margin is used in the *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. You might use the selling price in a probability rule to exclude lower-priced items.
Shrink Rate %	Typically represents the percentage loss experienced for the product in this location due to theft or breakage. You might use the shrink rate as part of a probability rule that reduces the available quantity by the shrink rate percentage. This percentage can be up to 2 positions, and must be a whole number. It cannot be a negative number.
Cost	The single-unit cost of the product in this location. Can be up to 19 positions with a 4-position decimal. It can also be 0, but cannot be a negative number, and should not include a currency symbol. Optional, but should be specified if Gross Margin is used in the *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. You might use the cost in a probability rule to exclude higher-cost items.
Sales Velocity	A numeric ranking you can use to indicate how well a product sells in a particular location. You can use the sales velocity ranks assigned to product locations as part of the criteria for selecting fulfilling or sourcing locations for orders, either through standard or weighted brokering. Numeric; 2 positions with an optional 2-position decimal. Can be blank, or any number from 0 to 99.99. See the Standard Brokering or Weighted Brokering tabs at the *Preferences* screen for more information.
Margin	The Selling Price minus the Cost. If no Cost is specified, the Margin is equal to the Selling Price. If a Cost is specified, but no Selling Price, the Margin is negative. If no Cost or Margin is specified or if you set them to 0, the Margin is blank or 0.0000. System-calculated when either the Selling Price or Cost is entered. Display-only.

Edit Product Location

Purpose: Use the **Edit Product Location** screen to review or update availability information for a *product location*, or to check the last time this information was updated.

Used for the Routing Engine module.

Product relationships: See *Product, System Product and Product Location* for an overview of the relationships among **Order Broker** elements, including product locations. Also, see the *Product Locations* screen for more information on how product locations are created in Order Broker.

Updated how? The availability information displayed at this screen can be updated by:

- a periodic refresh from an external system (such as product import processing from the order management system)
- entry at the *Edit Product Location* screen
- the *Fulfilled Inventory Export*
- the *availability update request*
- the *product update request*
- an on-demand refresh triggered by a *locate items* search or *product availability search* for an *online system*
- *OCDS or Merchandising Omni Services Imports*

Order Broker uses the availability information displayed here to select a fulfilling location or a sourcing location for a ship-for-pickup order when:

- the location is in an *offline system*, or
- the location is in an *online system*, but the Order Broker cannot communicate with the system and the *No Offline Response Action* setting at the *Preferences* screen is *Use offline*

Order Broker uses the availability information displayed here in the locate items response when:

- the location is in an *offline system*, or
- the location is in an *online system*, but the Order Broker cannot communicate with the system and the *No Offline Response Action* setting at the *Preferences* screen is *Use offline*

Systems that use purchase order layering: The Next PO date and quantity listed might not reflect the date and quantity on the next open purchase order for a product if you integrate with a system such as Order Management System, which uses purchase order layering. In purchase order layering, the system accounts for the total quantity backordered to determine which purchase order might be able to fulfill a new order for the product. For example, the backorder quantity for a product is 115. There are 2 open purchase orders for the item, each with an order quantity of 100. Purchase order layering uses the date of the second purchase order as the Next PO Date since the full order quantity of the first purchase order is already fully committed to prior backorders. Also, it reports that the Next PO Quantity is 85, since the first 15 on the second purchase order is also already committed.

> **Note:**
>
> It is important to run the Batch Purchase Order Layering program (*BPOL*) in Order Management System before importing inventory information into Order Broker.

About attributes: The product attributes (*Daily Sell Through Quantity*, *Sell Quantity/Multiple*, *Minimum Sell Quantity*, *Shrink Rate %*, and *Sales Velocity*) are metrics that you can define for a product location in order to use them in probability rules. For example, you might want to display an available quantity of 0 if the actual available quantity is not more than the daily sell-through quantity for an off-line location. You can also have the Routing Engine use the Sales Velocity for product location ranking.

Additional attributes (*Status*, *On Clearance*, *Selling Price*, *Cost*, and *Margin*) can be used as part of *LocateItems Sequence and Splitting Examples (Standard Brokering)*.

How to display this screen:

- Click *Edit* for a product location at the *Browse Product Locations* window
- Select the edit icon ( ) for a location at the *Product Locations* screen
- Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.
- If the **Edit Product Location** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previously-selected product location displayed.

Updating a product location

Update any of the fields described below and click *Save*, or click *Cancel* to return to the *Product Locations* screen without making any changes.

> **Note:**
>
> Any changes you make at this screen can be overwritten the next time you import product location information, as described in *Importing Items/ Products, Inventory, Barcodes, Images, and Locations into the Database*.

Fields at this screen

Field	Description
Informational fields:	
Organization	The *organization* code and name are separated by a hyphen (-).
System Product	The *system product* code and name are separated by a hyphen (-).
Location	The *location* code and name are separated by a space.
Last Updated	The last date and time when this product location was updated through the product and inventory import process, *Fulfilled Inventory Export*, *inventory inquiry*, or interactively at this screen. Up to 6 positions. Display-only. Not updated when Order Broker updates the *Reserved Quantity* or *Fulfilled Quantity*.
Availability fields:	

Field	Description
Available Quantity	The quantity of the product available in this location as of the most recent update, before subtracting the *Reserved Quantity* and any *Fulfilled Quantity*, or applying any probability rules. This information can by updated through: • a periodic refresh from an external system (such as product import processing from the order management system) • entry at the *Edit Product Location* screen • the *Fulfilled Inventory Export* • the *availability update request* • the *product update request* • an on-demand refresh triggered by a *locate items* search or *product availability search* for an *online system* • interactive updates to product locations through the Retail Integration Bus (RIB) when *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services* is implemented. This information originates in Oracle Retail Merchandising Foundation Cloud Service (RMFCS). See the discussion above under *Edit Product Location* for more information. Order Broker uses this quantity to calculate the *Available to Promise* unless it receives an update from an *online system*. **Note:** The available quantity is a maximum of 6 positions, and can be a negative number. It cannot include decimals. **Probability rules:** Probability rules use the *Available to Promise* in tests, calculations, and results. See *Probability Rule Wizard* for background.
Reserved Quantity	The quantity on all order lines assigned to this product location that are in a status indicating the inventory is reserved for existing orders. The reserved quantity and any fulfilled quantity are subtracted from the *Available Quantity* to determine the *Available to Promise* quantity. Up to 6 positions. In the case of ship-for-pickup orders, the reserved quantity is updated at the sourcing location. You can use the *System* screen to select the statuses that indicate an order line is reserved. The reserved quantity displayed here is 0 if there are no order lines in a —toselected status assigned to this product location. Display-only. **For more information:** See the *Reservation tab* at the System screen for information on selecting reserved statuses, and see *Calculating the Available to Promise Quantity* for an overview.

Field	Description
Fulfilled Quantity	The quantity that has been fulfilled on delivery or pickup orders, or put in transit for ship-for-pickup orders, since the last fulfilled quantity export to the system, or inventory import from the system. The reserved quantity and any fulfilled quantity are subtracted from the *Available Quantity* to determine the *Available to Promise* quantity. Up to 6 positions. In the case of ship-for-pickup orders, the fulfilled quantity is increased at the sourcing location when the pickup location changes the status to fulfilled. *Tracked when?* The *Track Fulfilled Quantity* field at the *System* screen controls whether to track the fulfilled quantity and, if so, when to reset it. Display-only. **For more information:** See the *Track Fulfilled Quantity* field for a discussion of how the fulfilled quantity is updated, and see *Calculating the Available to Promise Quantity* for an overview.
Available to Promise	*Used for:* The quantity for the system to use when determining the available quantity to return in the LocateItems response and the *product availability search*, and to evaluate locations for order assignment. Up to 6 positions, and can be a negative number. Display-only. *Calculation:* Calculated by subtracting the *Reserved Quantity* and any *Fulfilled Quantity* from the *Available Quantity* for the product location. When you update the *Available Quantity* at this screen and press the *tab* key, the screen updates the Available to Promise quantity based on your entry. **Probability rules:** If a probability rule applies to the product location, it is calculated based on this quantity. **For more information:** See *Calculating the Available to Promise Quantity* for an overview.
Next PO Date	The next date when a purchase order for this product is expected for delivery. **Order Management System integration:** The date is calculated using purchase order layering, in which the expected quantity on a purchase order may be “reserved” for older backorders. This information is not updated automatically from Order Management System each time you enter or maintain a purchase order. Some other activity, such as a change to the available quantity above or below the specified threshold, is required to trigger an update from Order Management System to Order Broker.See the Order Management System online help for more information.
Next PO Quantity	The number of units ordered on the next purchase order. This quantity can be up to 6 positions. It cannot include decimals. **Order Management System integration:** This information is not updated automatically from Order Management System each time you enter or maintain a purchase order. Some other activity, such as a change to the available quantity above or below the specified threshold, is required to trigger an update from Order Management System to Order Broker.

Field	Description
Attributes	The following product attributes are available to guide selection of fulfilling or sourcing locations for orders: • probability rules: See the *Probability Rule Wizard* for more information • *standard brokering*: optionally, the Routing Engine can use the Sales Velocity for ranking • *weighted brokering*: the Science Engine can use various product location attributes based on the configured weighted brokering percentages Each of the product attributes are user-defined.
Daily Sell Through Quantity	Typically represents the average quantity of the product sold in this location on a daily basis. You might use this quantity as part of a probability rule that subtracts the daily sell-through quantity from the available quantity, especially if the location is in an *offline system*. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number.
Status	The status of the product in this location. You might use the status as part of a probability rule that excludes discontinued products. Possible statuses are: • Active (default) = Can be ordered. • Inactive = Cannot currently be ordered. • Discontinued = Can still be ordered, but will be inactive at some point in the future. Required.
Sell Quantity/ Multiple	Typically represents the selling multiple for a product; for example, you might sell tires in quantities of 4. You might use this quantity as part of a probability rule that indicates to exclude a product location, or display an available quantity of 0, if the available quantity is lower than the sell quantity/multiple. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number. You might also use the Minimum Sell Quantity to fulfill the same function.
On Clearance	Indicates whether the product is on clearance in this location: • Selected = The product is on clearance. • Unselected (default) = The product is not on clearance. You might use this setting as part of a probability rule that reduces the quantity that is expected to be available to fulfill orders. Used in *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. If you use *LocateItems Sequence and Splitting Examples (Standard Brokering)* and this flag is selected, the Science Engine uses a selling price of .01 to calculate margin.
Minimum Sell Quantity	See the Sell Quantity/Multiple, above. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number.

Field	Description
Selling Price	The single-unit selling price of the product in this location. Can be up to 19 positions with a 4-position decimal. It can also be 0, but cannot be a negative number, and should not include a currency symbol. Optional, but should be specified if Gross Margin is used in the *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. You might use the selling price in a probability rule to exclude lower-priced items.
Shrink Rate %	Typically represents the percentage loss experienced for the product in this location due to theft or breakage. You might use the shrink rate as part of a probability rule that reduces the available quantity by the shrink rate percentage. This percentage can be up to 2 positions, and must be a whole number. It cannot be a negative number.
Cost	The single-unit cost of the product in this location. Can be up to 19 positions with a 4-position decimal. It can also be 0, but cannot be a negative number, and should not include a currency symbol. Optional, but should be specified if Gross Margin is used in the *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. You might use the cost in a probability rule to exclude higher-cost items.
Sales Velocity	A numeric ranking you can use to indicate how well a product sells in a particular location. You can use the sales velocity ranks assigned to product locations as part of the criteria for selecting fulfilling or sourcing locations for orders, either through standard or weighted brokering. Numeric; 2 positions with an optional 2-position decimal. Can be blank, or any number from 0 to 99.99. See the Standard Brokering or Weighted Brokering tabs at the *Preferences* screen for more information.
Margin	The Selling Price minus the Cost. If no Cost is specified, the Margin is equal to the Selling Price. If a Cost is specified, but no Selling Price, the Margin is negative. If no Cost or Margin is specified or if you set them to 0, the Margin is blank or 0.0000. System-calculated when either the Selling Price or Cost is entered. Display-only.

UPC

Purpose: Use the **UPC** screen to review or work with existing UPC barcodes for a product, or create a new one.

What is a UPC barcode? A UPC barcode is an identification of a product by either a UPC-A or EAN-13 code.

Created how? You can create UPC barcodes for products when you download or export items or products from an external system, such as **Order Management System** or **Xstore**. See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for an overview, and see *Importing UPC Barcodes through File Storage API* for information specific to the barcode import.

Used how? You can use UPC barcodes in Store Connect to scan picked items on orders. See the *Store Connect Preferences* screen for more information.

Product relationships: See *Product, System Product and Product Location* for an overview of the relationships among **Order Broker** elements, including UPC barcodes.

How to display this screen: Click the UPC barcode icon ( ) next to a product at the *Products* screen.

> **Note:**
>
> - Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.
> - If the **UPC** screen was already open in another tab when you clicked the UPC barcode icon, you advance to this screen with the UPC barcodes for the previously-selected product displayed.

Options at this screen

Option	Procedure
create a UPC barcode **Note:** Normally, you should not create UPC barcodes using this method. By creating a UPC barcodes in Order Broker directly rather than using the process described under *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database*, you run the risk that UPC barcode information will be inconsistent with that in the external system, such as Order Management System or Xstore.	1. Enter a UPC barcode in the *UPC* field. 2. Select a barcode type from the *UPC Type* drop-down box. 3. Click *New*. If: • the UPC barcode has already been assigned to any product in your organization, Order Broker displays an error message. • your entries were valid, the new UPC barcode is added to the **UPC** screen. **Note:** To reassign a barcode to a different product through the screens, you need to first delete the existing barcode record and then create the new barcode record for the other product. However, you can reassign a product barcode through the import process; see *Importing UPC Barcodes through File Storage API* for more information.
search for a UPC barcode	Use 1 or both of the fields at the top of the screen to restrict the search results to matching UPC barcodes: 1. Enter a full or partial barcode and click *Search* to restrict your results to barcodes matching your entry. 2. Select a *UPC Type* and click *Search* to find matching UPC barcodes. **Case?** The barcode is case-sensitive for searching; for example, an entry of `a` does not match a barcode of `A12345`.
select a UPC barcode to edit the code	Click the edit icon ( ) next to UPC barcode to open the *Edit UPC* window.
delete a UPC barcode	Select the delete icon ( ) next to a UPC barcode to delete the barcode.

Fields at this screen

Field	Description
Informational fields:	
Organization	See *organization*. The organization code is separated from the organization description by a hyphen (-). Display-only.
Product	See *product*. The product you selected at the *Products* screen. The product code is separated from the product name by a hyphen (-). Display-only.
Search/New fields:	
UPC	The barcode identifying a product. *Creating a UPC barcode:* Enter a complete UPC-A or EAN-13 barcode identifying the product, select the UPC Type, and click *New* to create the barcode. A barcode can be assigned to a single product in an organization, but each product can have multiple UPC-A and EAN-13 barcodes. Required when creating. Up to 40 positions. *Searching for a UPC barcode:* Enter a full or partial barcode and click *Search* to display barcodes that match your entry. Case-sensitive for searching; for example, an entry of `a` does not match a UPC of `A12345`.
UPC Type	*Creating a UPC barcode:* Enter the barcode in the UPC field, select a type from the *UPC Type* drop-down box, and click *New* to create the UPC barcode. Available types are *UPC-A* and *EAN-13*, and a product can have multiple barcodes of each type. Required when creating. *Searching for a UPC barcode:* Select a type from the *UPC Type* drop-down box and click *Search* to position to that product location.
Search Results fields:	
UPC	The barcode identifying a product. Up to 40 positions.
UPC Type	The barcode type. Possible types are *UPC-A* and *EAN-13*.
Edit	Select the edit icon ( ) to open the *Edit UPC* window, where you can change the code.
Delete	Select the delete icon ( ) to delete the UPC barcode.

Edit UPC

Purpose: Use the **Edit UPC** window to update a UPC barcode for a product.

Used for the Routing Engine module.

How to display this window: Select the edit icon ( ) for a UPC barcode at the *UPC* screen.

> **Note:**
>
> Only users with *Products* authority can display this screen. See the *Role Wizard* for more information.

Updating the UPC barcode: Update the UPC number and click *Save*, or click *Cancel* to return to the *UPC* screen without making a change.

Fields at this window

Field	Description
Organization	See *organization*. The organization code is separated from the organization description by a hyphen (-). Display-only.
Product	See *product*. The product you selected at the *Products* screen. The product code is separated from the product name by a hyphen (-). Display-only.
UPC Type	The barcode type. Possible types are *UPC-A* and *EAN-13*. Display-only.
UPC	The barcode number identifying a product. Up to 40 positions. Optionally, enter a new barcode and click *Save* to change the barcode. Each barcode must be assigned to only a single product in an organization.

Product Attributes

Purpose: Use the **Product Attributes** screen to review or work with attributes that apply to a product.

Used when? When the Attribute Type specified for the attribute is *Product and Location*, the attribute can filter locations when routing orders for the product. However, when the Attribute Type is *Product*, the attribute assignment is informational only.

For more information: See *Using Attribute Rules for Delivery and Pickup Orders* and *Using Attribute Rules for Ship-for-Pickup Orders* for background, and see *Attribute Definitions* for information on creating and working with attribute definitions.

Used for the Routing Engine module.

How to display this screen: Select the attribute icon () for a product at the *Products* screen.

Options at this screen

Option	Procedure
apply a new attribute to the product	Click *New* to open the *New Product Attribute* window.
search for a product attributes	Optionally, enter a full or partial attribute code in the *Attribute Code* field to restrict your results to attributes whose codes start with your entry. Optionally, select a *Data Type* to restrict your results to attributes whose Data Types match your entry. Click *Search*.

Option	Procedure
select a product attribute for maintenance and review	Click the edit icon ( ) to open the *Edit Product Attribute* window.
delete an attribute	Click the delete icon ( ) next to a product attribute to delete it.

Fields at this screen

Field	Description
Informational fields:	
Organization	See *organization*. The organization code is separated from the organization description by a hyphen (-).
Product	See *product*. The product you selected at the *Products* screen. The product code is separated from the product name by a hyphen (-).
Search fields:	
Attribute Code	The Code identifying an attribute you can apply to products. Optionally, enter a full or partial attribute code and click *Search* to display product attributes that start with your entry.
Data Type	Indicates the type of data that can be defined through the attribute. Available data types are: • *Boolean:* Indicates whether a condition is true for the product or location; for example, use a Boolean attribute to identify each location that supports oversized items. Cannot be set to false. • *List:* Used to define a list of valid values that can be assigned to a product; for example, this might be a list of special handling options. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions. Optionally, select a Data Type and click *Search* to display product attributes that match your selection.
Results fields:	
Attribute Code	The Code identifying an attribute applied to the product.
Description	The description of the attribute. Can be up to 100 positions. Truncated if it exceeds the allotted space.
Value	The value of the product attribute. The value can be: • text, if the Data Type of the attribute is *Text* or *List* • numeric, if the Data Type of the attribute is *Text*, *List*, or *Number* • true, if the Data Type of the attribute is *Boolean* A text or list value can be up to 50 positions. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. Truncated if it exceeds the allotted space.

Field	Description
Data Type	Indicates the type of data that can be defined through the attribute. Available data types are: • *Boolean:* Indicates whether a condition is true for the product or location; for example, use a Boolean attribute to identify each location that supports oversized items. • *List:* Used to define a list of valid values that can be assigned to a product; for example, this might be a list of special handling options. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions.
Edit	Select the edit icon ( ) next to a product attribute to open the *Edit Product Attribute* window.
Delete	Select the delete icon ( ) next to a product attribute to delete the attribute from the product.

New Product Attribute

Purpose: Use the **New Product Attribute** window to apply an attribute to a product.

Used for the Routing Engine module.

Used when? When the Attribute Type specified for the attribute is *Product and Location*, the attribute can filter locations when routing orders for the product. However, when the Attribute Type is *Product*, the attribute assignment is informational only.

For more information: See *Using Attribute Rules for Delivery and Pickup Orders* and *Using Attribute Rules for Ship-for-Pickup Orders* for background.

Assigning attributes to locations or products: Use the *New Location Attribute* and *New Product Attribute* screens to assign attributes.

How to open this window: Click *New* at the *Product Attributes* screen.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen.

Fields at this window: Complete the fields described below and click *Save*, or click *Cancel* to return to the *Product Attributes* screen without creating the product attribute.

Field	Description
Product	See *product*. The product you selected at the *Products* screen. The product code is separated from the product name by a hyphen (-). Display-only.

Field	Description
Attribute Code	Select the Code identifying an attribute you can apply to a product. All attribute definitions that could be applied to the selected product are available for selection. Attributes are eligible if: • they were created with an Attribute Type of *Product* or *Product and Location*, and • they have not already been applied to the selected product, unless the Allow Multiple flag was selected Once you select an Attribute Code, the Description and Data Type are displayed above the Value field. Required.
Description	The description of the selected attribute. Display-only.
Data Type	Indicates the type of data that can be defined through the selected attribute. Possible data types are: • *Boolean:* Indicates whether a condition is true for the product; for example, set to true if the product requires engraving. Cannot be set to false. • *List:* Used to define a list of valid values that can be assigned to a product; for example, this might be a list of special handling options. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions. Display-only.
Value	Use this field to enter or select the value for the product attribute. If the Data Type is: • *Boolean:* Automatically selected and cannot be changed. • *List:* Select the Value from the displayed options defined for the attribute. Only Values that are not already assigned to the product are available for selection. • *Number:* Enter a numeric value. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Enter a numeric or text value. Can be up to 50 positions. Required, except that a Boolean defaults to selected and is display-only.

Edit Product Attribute

Purpose: Use the **Edit Product Attribute** window to change the value for an attribute applied to a product.

Used for the Routing Engine module.

Used when? When the Attribute Type specified for the attribute is *Product and Location*, the attribute can filter locations when routing orders for the product. However, when the Attribute Type is *Product*, the attribute assignment is informational only.

For more information: See *Using Attribute Rules for Delivery and Pickup Orders* and *Using Attribute Rules for Ship-for-Pickup Orders* for background.

How to open this window: Click the edit icon ( ) at the *Product Attributes* screen.

Note:

Available if Use Routing Engine is selected at the *Tenant* screen.

Fields at this window: Complete the fields described below and click *Save*, or click *Cancel* to return to the *Product Attributes* screen without updating the product attribute.

Note:

Boolean product attributes cannot be edited. You can delete the product attribute if it should not apply for routing purposes.

Field	Description
Product	See *product*. The product you selected at the *Products* screen. The product code is separated from the product name by a hyphen (-). Display-only.
Attribute Code	The Code identifying an attribute you can apply to a product. Display-only.
Description	The description of the selected attribute. Display-only.
Data Type	Indicates the type of data that can be defined through the selected attribute. Possible data types are: • *Boolean:* Indicates whether a condition is true for the product; for example, set to true if the product requires engraving. • *List:* Used to define a list of valid values that can be assigned to a product; for example, this might be a list of special handling options. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions. Display-only.
Value	Use this field to enter or select the value for the product attribute. If the Data Type is: • *Boolean:* Automatically selected and cannot be changed. • *List:* Select the Value from the displayed options defined for the attribute. Only Values that are not already assigned to the product are available for selection. • *Number:* Enter a numeric value. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Enter a numeric or text value. Can be up to 50 positions. Required, except that a Boolean defaults to selected and is display-only.

Probability Rules

Purpose: Use the **Probability Rules** screen to review or work with rules you can apply to the inventory information displayed in locate items search results or used for Routing Engine assignment, such as reducing the available quantity in a product location that has a high sell-through rate. From this screen, you can:

- **review** existing probability rules
- **create** a new rule
- **select** an existing rule to review the details on how it affects locate items results, or to change the rule
- **delete** a rule, provided it does not have existing details on how to affect locate items results
- **advance** to a window where you can review or work with calculations that you can include in probability rules

Used for the Routing Engine module.

How to assign rules? Use the *Probability Location* screen to assign probability rules and review the rules already assigned to locations.

Rules are not restricted to a single organization. You can assign rules to location types or locations in any organization.

Probable quantity rules: You use the *Probable Quantity Rules* screen rather than this screen to work with probable quantity rules, which update the *probable quantity* that a system, such as your ecommerce site, can use to estimate an item's availability. For more information on probable quantity rules and calculation of the probable quantity, see:

- the *Probable Quantity Rules* screen
- the *Probable Quantity Location* screen
- the *Inventory Quantity Export* at the *System* screen

How to display this screen: Select *Probability Rules* from the *Home Screen* or from the *Products Menu*.

For more information: For a brief overview of probability rules, see *Using Probability Rules*; and for more details, see *Probability Rule Overview*.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probability Rules* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
create a probability rule	Enter a rule name in the *Name* field and click *New* to advance to the *Probability Rule Wizard* screen, where you can set up a rule. The name can be up to 40 positions, and can include spaces and special characters. **For more information:** See *Probability Rule Wizard* for instructions on setting up probability rules, including sample rules.

Option	Procedure
search for a probability rule	Enter a full or partial rule name in the *Name* field at the top of the screen and click *Search* to restrict the search results to rules whose names contain your entry. **Case?** The rule name is case-sensitive for searching; for example, an entry of `a` does not match a rule that includes the word `Add`.
select a probability rule for maintenance	Click the edit icon ( ) next to a rule to advance to the *Probability Rule Wizard* screen.
review a probability rule	Click a probability rule once to open the *Browse Probability Rules* window.
delete a probability rule	Select the delete icon ( ) next to a rule to delete the rule from *Order Broker*. You can delete a rule only if there are no rule details and the rule has not been assigned to an organization, location type, or location. See the *Probability Location* screen for information on reviewing rule assignment.
review or work with calculations that can be included in probability rules	Click *Calc* to advance to the *Calculations* window.

Fields at this screen

Field	Description
Name	A description of the probability rule. The name can be up to 40 positions, and can include spaces and special characters. The rule name is case-sensitive for searching; for example, an entry of `a` does not match a rule that includes the word `Add`.
Results fields	
Name	The description of an existing probability rule.
Edit	Click the edit icon ( ) next to a rule to advance to the *Probability Rule Wizard* screen, where you can review or edit the rule. **Note:** If the *Probability Rule Wizard* screen is already open in another tab, you advance to that screen, where the previously-selected rule is displayed.
Delete	Click the delete icon ( ) next to a rule to delete the rule from *Order Broker*. This option is available only if the rule has not been assigned to an organization, location type, or location. See the *Probability Location* screen for information on rule assignment.

Calculations

Purpose: Use the **Calculations** window to review, create, or delete calculations that you can include in probability rules. Calculations allow you to add flexibility in how you present availability information in locate items search results or select a location for Routing Engine assignment. In order to include a calculation as part of a rule, you must first set it up at this window.

Example: You might set up a calculation of `Available quantity Reduce by [%] 10` so that you can create a rule that displays a lower available quantity. For example, if the complete rule is Always `Available Quantity Equal [=] Available Quantity Reduce By [%] 10`, and the available quantity for a product location based on your last update is `500`, the search results display an available quantity of `450`.

Used for the Routing Engine module.

There are two basic ways to use a calculation as part of a rule: as part of a *test*, or as the *result*. Any existing calculations are available for selection in the *Probability Rule Wizard* at either the *Conditions* or *Then* screen.

- *Test calculation:* Allows you to specify when to apply a rule. For example, you might want to apply a certain rule only if the available quantity plus the next PO quantity for a product location is less than the requested quantity for the locate items request. You create the calculation: `Available Quantity Plus [+] Next PO Quantity`. You can then include this calculation in a rule such as:

  If `Available Quantity Plus [+] Next PO Quantity Less Than [<] Requested Quantity`

  Then `Exclude Location`

- *Result calculation:* Allows you to perform a calculation against the available quantity, next PO date, or next PO quantity displayed in the locate items search results. For example, you might want to add 5 days to the next PO date if the PO is for a certain group of products that is known to ship late. You create the calculation: `Next PO Date Plus Days 5`. You can then include this calculation in a rule such as:

  If `Department Equal To [=] XYZ`

  Then `Next PO Date Equal [=] Next PO Date Plus Days 5`

  You could also create a rule using the Always test and the calculation, such as:

  Always `Next PO Date Equal [=] Next PO Date Plus Days 5`

> **Note:**
>
> If the calculation is based on the Next PO date plus a number of days, but the product location does not have a Next PO date, the Routing Engine avoids returning an error by basing the next PO date calculation on a date of January 1, 1970. In this situation, the locate items response might include a date such as 1970-01-21.

For more information: See:

- overview on probability rules: *Using Probability Rules*
- complete instructions for setting up rules, including sample rules and calculations: *Probability Rule Wizard*

How to display this window: Click *Calc* at the *Probability Rules* screen.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probability Rules* authority can display this screen. See the *Role Wizard* for more information.

In this topic:

- *Options at this screen*
- *Fields at this window*
- *Valid operators for elements*

Options at this screen

Option	Procedure
create a new calculation	1. From the first drop-down box, select the *Element* you would like to use as the first part of the calculation. For example, to set up the calculation `Available Quantity Reduce By [%] 15`, select *Available Quantity*. 2. From the second drop-down box, select the operator you would like to use as part of the calculation. For the sample calculation mentioned above, select *Reduce by [%]*. **Note:** See the *Valid operators for elements* table below for guidelines on which operators are available for different types of elements. 3. Use the last field to select from the list of values in the drop-down list, or to select *Enter value...* and enter a specific value. For the sample calculation mentioned above, enter *20*. 4. Click *Save*. Order Broker verifies that your selections and any entry are valid before creating the calculation. 5. Click *Cancel* when you are done to return to the previous screen. **Note:** You cannot create the same calculation more than once.

Option	Procedure
delete an existing calculation	Select the delete icon ( ) next to a calculation to delete it. You cannot delete a calculation that is included in a probability rule.
return to the previous screen	Click *Cancel*.

Fields at this window

Field	Description
Entry fields	
Element	The element you would like to use as part of a *Test* or *Result* calculation in a probability rule. Available elements are: • *Available Quantity* for a product location • *Cost* for a product location • *Next PO Quantity* for a product location • *Next PO date* for a product location • *Last Updated* date (MM/DD/YY) for a product location • Requested quantity for the locate items request or submit order request • Today • *Daily Sell Through Quantity* for a product location • *Minimum Sell Quantity* for a product location • *Sales Velocity* for a product location • *Sell Quantity/Multiple* for a product location • *Selling Price* for a product location • *Shrink Rate %* for a product location
Operator	The calculation to perform against the element from the first field. Depending on whether the first element is a quantity or a date, different operators are available to apply. See *Valid operators for elements* for more information. You cannot select the operator until you select the element in the first field. **You can select either a value or a metric to use in the third position of a calculation.**

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Element or Value</td><td>You must select the value in the first field before you can enter or select the value in the third field:

If the first field is one of the following numeric values: (Available Quantity, Daily Sell Through Quantity, Minimum Sell Quantity, Next PO Quantity, Requested quantity, Sales Velocity, Sell Quantity/ Multiple, or Shrink Rate %), then your selection or entry in the third field must also be numeric.
Example: If the first element is <code>Next PO quantity</code> and the operator is <code>Plus [+]</code>, your entry in the third field might be <code>Available quantity</code>.

Valid entries: If you enter a specific value rather than selecting from the drop-down list, your entry must be a whole number and cannot be negative.
Example: If the element in the first element is <code>Available quantity</code> and the operator is <code>Reduce by [%]</code>, your entry in the third field might be 10 (10%).

If the first field is Cost or Selling Price: Your selection in the third field must be either Cost, Selling Price, or a numeric value, which can include a decimal.
If the first field is a date (Last Updated date, Next PO date, or Today), valid selections are:

Last Updated date
Next PO date
Today
Valid entries: If you enter a specific value rather than selecting from the drop-down list, your entry must be a whole number and cannot be negative.
Example: If the element is Next PO date and the operator in the operator is <code>Plus Days</code>, your entry in the third field might be <code>10</code>.
Formatting: Format is based on the settings at the User Profile Configuration screen.

</td></tr>
<tr><td>Calculation fields</td><td></td></tr>
<tr><td>Calculation</td><td>The contents of a calculation you have created.
Note: The calculation displayed on the screen cannot exceed 40 positions; additional characters are truncated. For example, the calculation of <code>Available Quantity Plus [+] Next PO Quantity</code> is displayed on the screen as <code>Available Quantity Plus [+] Next PO Quan</code>.</td></tr>
<tr><td>Delete</td><td>Select the delete icon ( ) next to a calculation to delete the calculation.</td></tr>
</table>

Valid operators for elements

Quantities and amounts: *Available Quantity*, *Cost*, *Daily Sell Through Quantity*, *Minimum Sell Quantity*, *Next PO Quantity*, Requested quantity, *Sell Quantity/Multiple*, *Sales Velocity*, *Selling Price*, or *Shrink Rate %*

Dates: *Last Updated* date, *Next PO date*, or Today

The following table provides information on the resulting calculations when you apply these operators.

Operator	Sample Calculation	Sample Result/Comments
`Reduce by [%]`	`Available quantity Reduce by [%] 10`	Reduces the available quantity for the product location by 10%. If the first quantity is a negative number, such as -10, the result is a lower negative number, such as -11.
`Increase by [%]`	`Daily sell through quantity Increase by [%] 10`	Increases the daily sell-through quantity for the product location by 10%. If the first quantity is a negative number, such as -10, the result is a higher negative number, such as -9.
`Plus [+]`	`Next PO quantity Plus [+] 10`	Adds 10 to the next PO quantity for the product location. If the first quantity is a negative number, such as -10, the result is a higher number, such as 0.
`Minus [-]`	`Available Quantity Minus [-] Daily Sell Through`	Subtracts the daily sell-through quantity for the product location from the available quantity. If the available quantity is a negative number, such as -10, the result is a lower number, such as -15.
`Divide [/]`	`Available Quantity Divide [/] Minimum Sell Qty`	Divides the available quantity for the product location by the minimum sell quantity. If the first number is a negative number, such as -10, the result is a higher number, such as -5. If the second number is 0, the rule is invalid, and Order Broker skips it.
`Multiply [*]`	`Requested Quantity Multiply [*] Sell Qty`	Multiplies the requested quantity in the locate items request by the Sell quantity/multiple for the product location. If one of the numbers is negative, such as -10, the result is a lower number, such as -40.
`Plus Days`	`Next PO Date (MM/DD/YYYY) Plus Days 5`	Increases the next PO date for the product location by the number of days. If the next PO date is 07/01/2013 and the number of days specified is 5, the result is 07/06/2013.
`Minus Days`	`Next PO Date Minus Days 3`	Decreases the next PO date for the product location by the number of days. If the next PO date is 08/15/2013 and the number of days specified is 3, the result is 08/12/2013.

Probability Rule Wizard

Purpose: Use the **Probability Rule Wizard** to create or edit probability rules.

Used for the Routing Engine module.

What are probability rules used for? Rules alter the inventory information returned in locate items search results and used to assign delivery or ship-for-pickup orders. For example, you can set up a rule to reduce the available quantity displayed for a product location that has a high sell-through rate. If you base order assignment on available quantity, this rule might cause the Routing Engine to assign an order to a different location.

Inventory quantity export: You can use probability rules to calculate the expected available quantity that you export to an integrated system, both by sending incremental updates through a web service, and through a pipe-delimited extract file. See *Probability Rules Update and Incremental Quantity Web Service* for more information.

Steps to create a probability rule:

1. *Rule Type*: indicate whether the rule has any qualifications (an “if” statement) or should always apply when assigned to a location; also, you can specify or change the name of a rule
2. *Conditions*: specify the conditions that must be met for a rule with an “if” statement
3. *Then*: specify the calculation to apply when the rule meets the qualifications (if there is an “if” statement) or to always apply (for an “always” rule)
4. *Review*: review the rule before you accept your entries or changes

> **Note:**
>
> When advancing through the wizard to create or edit a probability rule, there may be a small lag time until the screen displays the updated data.

How to assign rules? Use the *Probability Location* screen to assign probability rules and review the rules already assigned to locations.

Margin? Since margin is a calculated field, you can use the *Calculations* window, available at the *Probability Rules* screen, to create a margin calculation, which you can then use in a probability rule.

For more information: See *Probability Rule Overview* for a complete discussion on setting up, assigning, and testing rules.

Probable quantity rules: You use the *Probable Quantity Rules* screen rather than this screen to create probable quantity rules, which update the *probable quantity* that a system, such as your ecommerce site, can use as an estimate of an item’s availability. For more information on probable quantity rules and calculation of the probable quantity, see:

- the *Probable Quantity Rules* screen
- the *Probable Quantity Location* screen
- the *Probable Qty Export* tab at the *System* screen

How to display the wizard: You can launch the **Probability Rule Wizard** from the *Probability Rules* screen by:

- clicking *New*, or
- clicking the edit icon ( ) next to an existing rule
- clicking *Edit* at the *Browse Probability Rules* window

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probability Rules* authority can display this screen. See the *Role Wizard* for more information.

In this topic:

- *Probability Rule Overview*
- *About Calculations*
- *Using the Probability Wizard*
- *Rule Type*
- *Conditions*
- *Then*
- *Review*
- *Sample Rules*
- *Testing a Rule*

Probability Rule Overview

What do rules do? Rules let you modify product search results (for example, locate items) and Routing Engine assignment by:

- changing the available quantity, PO quantity, or PO date to use for a product search response or to evaluate whether to assign an order to the location; or,
- excluding the location from the product search response or from consideration for order assignment

When can a rule apply?

- *Rule conditions:* A rule assigned to a location, location type, or organization can apply unconditionally, or based on conditions you set up based on dates, quantities, information about the order, or information about the product.
- *Probability location options:* When you assign a rule to a location, type, or organization, you can specify a range of valid dates, indicate whether it applies to online or offline inventory information, or flag it as inactive.

Basic steps: The basic steps to setting up a probability rule are:

1. *Create the rule and details:* Use the *Probability Rule Wizard* to create the rule and its details. Details include:
   - the *Rule Type* that determines whether the rule applies (*If* or *Always*)
   - for an “if” rule, the *Conditions* that a product location must meet for the rule to apply
   - the **result** of the rule; that is, which field to modify for the search results or order assignment, or whether to exclude product locations from the search results or order assignment based on whether they meet the criteria for the rule

> **Note:**
>
> *Calculation:* You have the option to create a calculation to use as part of the rule test, or to apply as part of the rule results (for example, `Available Quantity` + `Next PO Quantity`). Use the *Calculations* window, available at the *Probability Rules* screen, to work with calculations. See *About Calculations* for a brief overview.

2. *Assign the rule* to one or more organizations, location types, or locations: Use the *Probability Location* screen to specify which locations should be affected by the rule. As part of assigning a rule at any of these levels, you can also specify:
   - a “from” date, “to” date, both, or neither, when the rule is effective
   - whether the rule applies only to locations with off-line availability information, on-line availability information, or both
   - whether the rule is active or inactive
3. *Test the rule:* Perform test locate items searches or order creation using a testing tool or from an integrated system, and confirm that the results are what you expect.

> **Important:**
>
> In order for probability rules to apply, you need to have the Use Probability Rules preference set to *Yes* at the *Preferences* screen.

About Calculations

You can specify more complex conditions to apply, or results to display, by using calculations. For example, if you would always like to reduce the available quantity for a location by its shrink rate, you can set up a rule such as: Always `Available Quantity Equal [=] Available Quantity Reduce By [%] Shrink`

This rule includes the calculation `Available Quantity Reduce By [%] Shr`ink.

Where can you use a calculation? You might use a calculation as the:

- Element (first field) or Element or Value (third field) for a rule at the *Condition* step
- Element or Value (third field) for a rule at the *Then* step

Use the *Calculations* window to create or work with calculations.

Using the Probability Wizard

The steps to create a rule are to set the:

1. *Rule Type*
2. *Conditions*
3. *Then*
4. *Review*

For more information: See *Probability Rule Overview* for background.

Rule Type

Purpose: Use this step in the *Probability Rule Wizard* to:

- specify the name of a new rule or change the name of an existing rule
- set up the rule, including specifying whether the rule has an “if” statement with conditions that a product location must meet in order for the rule to apply, or whether the rule applies unconditionally when it is assigned to a location (an “always” rule)

How to display: At the *Probability Rules* screen:

- click *New*, or
- click the edit icon () next to an existing rule

Completing this step:

1. Enter the *Rule Name*. If you entered a name at the *Probability Rules* screen or are editing an existing rule, the name defaults here, but you can override it. The name cannot exceed 40 positions, and can include spaces and special characters.

> **Note:**
>
> You cannot enter a rule name that is an exact match to an existing rule; however, you can enter a rule name that matches an existing rule except for case or a trailing space.

2. Select the *Type of Rule* to indicate whether the rule has an “if” statement with conditions, or is an “always” rule that applies unconditionally.
3. If the rule has just the action and no additional tests to perform, then you set the Type of Rule set to *Always*. These rules are simple statements: for example, Always `Available quantity Equals [=] Available quantity - Daily Sell Through Qty`).
4. If you want to apply one or more tests against the product location to determine whether to apply the rule, then the Type of Rulemust be *If*.

Next step: When you create an *If* rule, you use the *Conditions* step to specify one or more conditions. Click *Next* to advance to the:

- *Conditions* step if the Type of Rule is *If*
- *Then* step if the Type of Rule is *Always*
- Click *Cancel* to return to the *Probability Rules* without saving your entries.

Field	Description
Rule Name	Enter the name of the rule. The *Probability Rules* screen and the *Probability Location* screen display this name to identify the rule. The name can be up to 40 positions, and can include spaces and special characters. If you entered a name at the *Probability Rules* screen or are editing an existing rule, the name defaults here, but you can override it.

Field	Description
Type of Rule	Select: • *If* = when you assign the rule, it applies only if the product location meets the conditions you set up through the *Conditions* step. • *Always* = when you assign the rule to a location, it performs the action unconditionally. If you select this setting, you advance next to the *Then* step.

Conditions

Purpose: Use this step in the *Probability Rule Wizard* to set up the conditions that a product location must meet in order for the rule to apply.

How to display: You advance to this step from the *Rule Type* step if you selected *If* as the Type of Rule. You do not advance to this step if the Type of Rule is *Always*.

Specifying a condition

A rule that has a *Rule Type* of *If* requires at least one condition.

Examples:

1. *Element:* Possible elements are:
   - Availability information for a product location: *Available Quantity* or *Available to Promise*, *Next PO date*, and *Next PO Quantity*. You can use these values as part of a test for a rule or in a calculation as well as updating them in the search results.

     Examples:

     – If **Available quantity** is less than requested quantity

     – Always set **Next PO date** equal to Today plus 5 days
   - Attributes for a product location: Product attributes are *Cost*, *Daily Sell Through Quantity*, *Minimum Sell Quantity*, *On Clearance*, *Sales Velocity*, *Sell Quantity/ Multiple*, *Selling Price*, *Shrink Rate %*, and *Status*. You can use these values as part of the test for a rule or in a calculation.

     Examples:

     – If **Sell quantity** is less than available quantity

     – If **Daily sell-through quantity** is more than requested quantity

     – If **Status** is Inactive
   - Product or system product information: *Category*, *Class*, *Department*, *Master Style*, or *System Product* code. You can use these values as part of the test for a rule.

     Examples:

     – If **Category** is equal to 9867

     – If **Master style** is not equal to AB100
   - Date: You can compare the *Last Updated* date for a product location with the current date (Today), or with specific dates.

     Example: If **Today** is after the next Next PO date.

- Information about the order or request:Express Carrier, Order Type, Originating System, or Requested Quantity. You can use these values as part of the test for a rule.

  Example: If the order uses an *Express Carrier.*

  About rules based on the express carrier setting: If a delivery or ship-for-pickup order is submitted without a carrier specified, the Routing Engine checks the *Express* setting of the Default Carrier specified at the **Preferences** screen. When a request is not associated with an order (*locate items*, *product availability search*), the Routing Engine also uses the Default Carrier if the transaction type is *DELIVERY* or *SHIPFORPICKUP*. Otherwise, for a *PICKUP* transaction type, the Routing Engine always considers the Express setting to be *No*.

- *Calculations:* If you have used the *Calculations* window to create any calculations, any existing calculations are listed below the system-supplied elements, and you can select one to use as part of a test. For example, use the `Available Quantity Reduce By [%] Shrink` calculation as part of a rule that starts: If `Available Quantity Reduce By [%] Shrink Less Than [<] Requested Quantity`

2. *Operator:* The operator identifies the relationship between the Element and the Element or Value. Possible operators are:

   - *Quantity or Amount:* If the Element represents a quantity (Available Quantity, Next PO Quantity, Sell Qty/Multiple, Shrink Rate, or Sales Velocity) or an amount (Selling Price, Cost), possible operators are:
     - Equal to [=]
     - Not equal to [!=]
     - Less than [<]
     - Less than or equal to [<=]
     - Greater than [>]
     - Greater than or equal to [>=]
   - *Value* or *code*: If the Element represents a code or a value (Category, Class, Master Style, Status, System Product Code, Order Type or Originating System), possible operators are:
     - Equal to [=]
     - Not equal to [=]

     Note: If the selected value is Express Carrier or On Clearance, then the only available operator is Equal to [=].
   - *Date:* If the Element represents a date (Last Updated Date, Next PO Date, Today, or a date calculation), possible operators are:
     - Before
     - After
   - *Calculation:* The appropriate operators depend on the type of element used in the calculation. For example, if the calculation involves the quantity, then appropriate operators are the same as those listed above for other quantities.

3. *Element or Value:* The element or value that the rule is comparing with the element or calculation in the second field. For example, if the line is: If `Available`

`Less Than [<] Requested Quantity`, then the rule is comparing the Requested Quantity with the Available Quantity selected from the Element field.

You can select an element or calculation, or enter a value, that is the same type of information as the selected Element. For example, if the Element is Next PO Quantity or Available Quantity Reduce By [%] 10, then your selection or entry must be a quantity. If the Element is a:

- *Quantity:* You can select:
  - *Available Quantity* (but *Available to Promise* is used if it is different from the available quantity)
  - *Next PO Quantity*
  - *Sell Quantity/Multiple*
  - *Minimum Sell Quantity*
  - *Daily Sell Through Quantity*
  - *Shrink Rate %*
  - *Sales Velocity*
  - Requested Quantity
  - a calculation using a quantity (for example, `Available quantity minus [-] Shrink Rate`)
  - or you can select *Enter value...* and enter a quantity. The *Enter value...* option is at the bottom of the drop-down list.
- *Date:* You can select:
  - *Next PO date*
  - *Last Updated* date
  - Today
  - a calculation using a date (for example, `Next PO date plus [+] 2`)
  - or you can select *Enter value...* and enter a date in the format specified at the *User Profile Configuration* screen. The *Enter value...* option is at the bottom of the drop-down list.
- *Amount:* You can select Selling Price, Cost, or a calculation using amount.
- *Defined Value or code:*
  - Express Carrier or On Clearance: select *Yes* or *No*
  - Order Type: select *Pickup*, *Delivery* or *Ship For Pickup*
  - Status: select *Active*, *Inactive*, or *Discontinued*
  - Originating System: select any system in the organization, with the exception of a vendor system or Store Connect system
  - Any other defined value (Category, Class, Department, Master Style, or System Product Code): you can select *Enter value...* and enter a value. For example, you can set up a condition such as If `System Product Code Equal To [=] AB200`. The *Enter value...* option is at the bottom of the drop-down list.

> **Note:**
>
> When you enter a value, your entry is not validated; however, when the Routing Engine evaluates a probability rule, matching is case-sensitive.

Completing entry of the condition: Click *Add* to add the condition, or click *Reset* to clear your entries in the Element, Operator, and Element or Value fields.

Multiple conditions?

If rules can specify one or more conditions, and each condition begins with an Or or an And:

- Or: If the product location meets *either* or *any* of the conditions, then apply the rule. For example, if you would like to add 5 days to the next PO date for *either* product AB100 or product AB200, you might create a rule such as:

  If `System Product Code Equal To [=] AB100`

  Or `System Product Code Equal To [=] AB200`

  Then `Next PO Date Equal [=] Next PO Date Plus Days 5`

- And: If the product location must meet *both* or *all* of the tests, then apply the rule, For example, if you would like to decrease the available quantity by 20% for product locations where *both* the available quantity is less than 10 *and* the next purchase order date is earlier than the current date, you might create a rule such as:

  If `Available Quantity Less Than [<] 10`

  And `Next PO Date Before Today`

  Then `Available Quantity Equal [=] Available Quantity Reduce By [%] 20`

Changing a condition

Highlight an existing condition at the top of the screen so that you can use the Element, Operator, and Element or Value fields to change the condition. See *Specifying a condition*, above, for information on your options when setting up a condition.

Click *Change* to accept your changes to the condition.

Deleting a condition

If the rule has multiple conditions, highlight an existing condition at the top of the screen and click *Delete* to remove the condition. This option is available only for Or or And conditions.

Rearranging conditions

If the rule has at least 3 conditions (the If condition and at least 2 Or or And conditions), highlight an existing Or or And conditions condition at the top of the screen and drag it up or down to the new position.

Accepting or rejecting your entries

Click *Next* to advance to the *Then* step.

Click *Cancel* to reject all changes to the rule, including those made at the *Rule Name* step, and return to the *Probability Rules* screen. If you were creating a new rule, the rule is not saved.

Optionally, click *Previous* to return to the *Rule Type* step.

Fields at this step

Field	Description
Element	The quantity, date, or field to compare with the second *Element or Value* when determining whether to apply the rule. The elements available for selection here include fields related to a product or product location as well as calculations that you have created through the *Calculations* window. • Availability information for a product location: *Available Quantity* (but *Available to Promise* is used if it is different from the available quantity), *Next PO date*, and *Next PO Quantity*. You can use these values as part of a test for a rule or in a calculation as well as updating them in the search results. *Examples:* – If **Available quantity** is less than requested quantity – Always set **Next PO date** equal to Today plus 5 days • Attributes for a product location: Product attributes are *Daily Sell Through Quantity*, *Minimum Sell Quantity*, *On Clearance*, *Sales Velocity*, *Sell Quantity/Multiple*, *Shrink Rate %*, *Selling Price*, *Status*, and *Cost*. You can use these values as part of the test for a rule or in a calculation. *Examples:* – If **Sell quantity** is less than available quantity – If **Daily sell-through quantity** is more than requested quantity • Product or system product information: *Category*, *Class*, *Department*, *Master Style*, or *System Product* code. You can use these values as part of the test for a rule. *Examples:* – If **Category** is equal to 9867 – If **Master style** is not equal to AB100 • Date: You can compare the *Last Updated* date for a product location with the current date (Today), or with specific dates. *Example:* If **Today** is after the next Next PO date • Information about the order or request: Express Carrier, Order Type, Originating System, or Requested Quantity. You can use these values as part of the test for a rule. *Example:* If the order uses an *Express Carrier* *About rules based on the express carrier setting:* If a delivery or ship-for-pickup order is submitted without a carrier specified, the Routing Engine checks the *Express* setting of the Default Carrier specified at the **Preferences** screen. When a request is not associated with an order (*locate items*, *product availability search*), the Routing Engine also uses the Default Carrier if the transaction type is *DELIVERY* or *SHIPFORPICKUP*. Otherwise, for a *PICKUP* transaction type, the Routing Engine always considers the Express setting to be *No*. Calculations: If you have used the *Calculations* window to create any calculations, any existing calculations are listed below the system-supplied elements, and you can select one to use as part of a test. For example, use the `Available Quantity Reduce By [%] Shrink` calculation as part of a rule that starts: If `Available Quantity Reduce By [%] Shrink Less Than [<] Requested Quantity`. Calculations are listed below the other possible elements.

Field	Description
Operator	Possible operators are: • *Quantity or amount:* If the Element represents a quantity (Available Quantity, Next PO Quantity, Sell Qty/Multiple, Shrink Rate, or Sales Velocity) or an amount (Cost, Selling Price), possible operators are: – Equal to [=] – Not equal to [!=] – Less than [<] – Less than or equal to [<=] – Greater than [>] – Greater than or equal to [>=] • *Value* or *code*: If the Element represents a code or a value (Category, Class, Master Style, Status, System Product Code, Order Type or Originating System), possible operators are: – Equal to [=] – Not equal to [=] If the selected value is Express Carrier or On Clearance, then the only available operator is Equal to [=]. • *Date:* If the Element represents a date (Last Updated Date, Next PO Date, Today, or a date calculation), possible operators are: – Before – After
Element or Value	Depending on the selection in the *Element* field, your options at the Element or Value field are: • Quantity element: select a quantity element or calculation, or enter a value • Amount element (Cost or Selling Price): select an amount element or calculation, or enter a value; can include a decimal • Date element: select a date element or calculation, or enter a date in the format specified at the *User Profile Configuration* screen. • Defined value element: – Express Carrier or On Clearance: select *Yes* or *No* – Order Type: select *Pickup*, *Delivery*, or *Ship For Pickup* – Originating System: select any system in the organization, with the exception of a vendor system or Store Connect system – Status: select *Active*, *Inactive*, or *Discontinued* – Any other defined value (Category, Class, Department, Master Style, or System Product Code): enter a value **Note:** When you enter a value, your entry is not validated; however, when the Routing Engine evaluates a probability rule, matching is case-sensitive.

Then

Purpose: Use this step to specify the result of the rule. Possible results are:

- change the available quantity, PO quantity, or PO date to use for a locate items response or evaluate whether to assign an order to the location
- exclude the location from the locate items response or from consideration for order assignment through the Routing Engine

How to display: You advance to this step from the:

- *Conditions* step if you selected *If* as the Type of Rule at the *Rule Type* step
- *Rule Type* step if you selected *Always* as the Type of Rule at the *Rule Type* step

Exclude location: Select Exclude location to have a product location excluded from search results or order assignment by the Routing Engine. For an If rule, the product location must match the conditions set up at the *Conditions* step.

> **Note:**
>
> A probability rule set to Exclude location does not prevent Order Broker from assigning an order to a location if the SubmitOrder request specifies the location as the fulfilling location. The rule only prevents the location from being included in the locate item search results and automatic assignment using the Order Broker rules.

Alter a field for the product location: If you do not select Exclude Location, specify the field to update and how to update it:

- *Element:* Possible elements to alter are:
  - *Available Quantity*
  - *Next PO Quantity*
  - *Next PO date*
- *Equal [=]:* This is the only possible operator.
- *Element or Value:* The resulting element or value must correspond to the Element:
  - *Available Quantity*: Possible element or value settings are:
    - *Next PO Quantity*
    - *Sell Quantity/Multiple*
    - *Minimum Sell Quantity*
    - *Daily Sell Through Quantity*
    - *Shrink Rate %*
    - *Sales Velocity*
    - Requested Quantity
    - a calculation using a quantity (for example, `Available quantity minus [-] Shrink Rate`)
    - or you can select *Enter value...* and enter a quantity. The *Enter value...* option is at the bottom of the drop-down list.
  - *Next PO Quantity*: Possible element or value settings are:

  * *Available Quantity* (but the *Available to Promise* is used if it is different from the available quantity)
  * *Sell Quantity/Multiple*
  * *Minimum Sell Quantity*
  * *Daily Sell Through Quantity*
  * *Sales Velocity*
  * *Shrink Rate %*
  * Requested Quantity
  * a calculation using a quantity (for example, `Available quantity minus [-] Shrink Rate`)
  * or you can select *Enter value...* and enter a quantity. The *Enter value...* option is at the bottom of the drop-down list.
- *Next PO date*: Possible element or value settings are:
  * *Last Updated* date
  * Today
  * a calculation using a date (for example, `Next PO date plus [+] 2`)
  * or you can select *Enter value...* and enter a date in the format specified at the specified at the *User Profile Configuration* screen. The *Enter value...* option is at the bottom of the drop-down list.

For more information: See the *Conditions* step for details on the fields at this screen.

Accepting or rejecting your entries:

Click *Next* to advance to the *Review* step.

Click *Cancel* to reject all changes to the rule and return to the *Probability Rules* screen. If you were creating a new rule, the rule is not saved.

Optionally, click *Previous* to return to the *Conditions* step (for an If rule) or the *Rule Type* step for an Always rule).

Review

Purpose: Use this step to review a rule you have created or changed, and to accept or reject the rule.

How to display: You advance to this step from the *Then* step.

This step displays the rule you have created or changed using the *Probability Rule Wizard*.

Rule not eligible Inventory Quantity Export Calculation: A message indicates if the rule cannot apply to the inventory quantity export, since the records are created without being associated with an order. This message is displayed for rules that are based on express carrier, order type, originating system, last updated date, today, or requested quantity as a condition. See the *Probability Rules Update and Incremental Quantity Web Service* for more information.

Click *Save* to accept your changes and save the rule, or click *Cancel* to reject all changes to the rule and return to the *Probability Rules* screen. If you were creating a new rule, the rule is not saved.

Optionally, click *Previous* to return to the *Then* step.

Sample Rules

The following table presents sample rules and includes the desired result, the steps to creating the rule, and the appearance of the rule once it is created.

First steps in creating rule details: The steps presented below tell you how to create rule details through the *Probability Rule Wizard*.

To assign the rule: After you create a rule, you need to use the *Probability Location* screen to apply the rule at the location, location type, or organization level, including specifying additional rule options such as sequence number, type (on-line only, off-line only, or both), date range, and whether the rule is active or inactive. See *Testing a Rule* for more information.

Desired result: Always exclude location 20 from locate items searches.

Use when? You might use this rule for a new store location that has begun stocking inventory but is not yet open for business.

In the probability rule wizard	Finished Rule
• At the *Rule Type* step, set the **Type of Rule** to *Always* and click *Next* • At the *Then* step, select *Exclude Location* and click *Next* • At the *Review* step, click *Save*	Always`Exclude Location`

Desired result: Always decrease the available quantity by the shrink rate.

Use when? You might use this rule for locations with a high shrink rate, in order to avoid disappointing customers with inaccurate availability information.

Calculation setup	In the probability rule wizard	Finished Rule
First, create a calculation: Before you can create this rule, you first need to create a calculation to include in the rule result, specifying how to reduce the available quantity in the search results. You use the Calculations window to work with calculations. You can advance to this screen by clicking *Calc* at the Probability Rules screen. At the *Calculations* window: 1. In first field, select *Available quantity* 2. In the second field, select *Reduce by [%]* 3. In the third field, select *Shrink rate* 4. Click *Save* This creates the calculation: `Available Quantity Reduce By [%] Shrink rate`. Select *Cancel* to return to the *Probability Rules* screen.	1. At the *Rule Type* step, set the **Type of Rule** to *Always* and click *Next* 2. At the *Then* step: 3. select *Available quantity* in the first field 4. select *Equal [=]* in the second field 5. select *Available Quantity Reduce By [%] Shrink* in the third field 6. Click *Next* 7. At the *Then* step, click *Save*	Always `Available Quantity Equal [=] Available Quantity Reduce By [%] Shrink`

Desired result: If the available quantity is less than the sell-through quantity, then present the available quantity as 0.

Use when? You might use this type of rule for locations with a high sell-through rate, especially if Order Broker does not receive real-time online inventory reporting.

<table>
<tr><th>In the probability rule wizard</th><th>Finished Rule</th></tr>
<tr><td>

At the Rule Type step, set the Type of Rule to If and click Next
At the Conditions step:
In the first field, select Available quantity
In the second field, select Less Than [<]
In the third field, select Daily Sell Through Qty
Click Add
The If statement is added to the conditions area at the top of the screen.
Click Next
At the Then step:
In the first field, select Available quantity
In the second field, select Equal [=]
In the third field, select Enter value..., and enter 0 in the window
Click Next
At the Review step, click Save

</td><td>If <code>Available Quantity Less Than [<] Daily Sell Through Qty</code>

Then <code>Available Quantity Equal [=] 0</code></td></tr>
</table>

Desired result: If the available quantity is less than 10 and the next expected PO date is earlier than today, reduce the available quantity by 20%.

Use when? You might use this type of rule to build a margin of error for situations when purchase orders ship late.

<table>
<tr><th>Calculation setup</th><th>In the probability rule wizard</th><th>Finished Rule</th></tr>
<tr><td>First, create a calculation: Before you can create this rule, you first need to create a calculation to include in the rule result, specifying how to reduce the available quantity in the search results. You use the Calculations window to work with calculations. You can advance to this screen by clicking Calc at the Probability Rules screen.
At the Calculations window:
1. In the first field, select Available quantity
2. In the second field, select Reduce by [%]
3. In the third field, select Enter value... and enter 20 in the window
4. Click Save
This creates the calculation: <code>Available Quantity Reduce By [%] 20</code>. Select Cancel to return to the Probability Rules screen.</td><td>1. At the Rule Type step, set the Type of Rule to If and click Next
2. At theConditions step:
• In the first field, select Available quantity
• In the second field, select Less Than or Equal To [<=]
• In the third field, select Enter value..., and enter 10 in the window
3. Click Add
The If statement is added to the conditions area at the top of the screen.
4. Add an additional condition at the Conditions step with And selected:
• In the first field, select Next PO Date
• In the second field, select Before
• In the third field, select Today
5. Click Add
The And statement is added to the conditions area at the top of the screen.
6. Click Next
7. At the Then step:
• In the first field, select Available quantity
• In the second field, select Equal [=]
• In the third field, select the calculation created above (<code>Available Quantity Reduce By [%] 20</code>)
8. Click Next
9. At the Review step, click Save</td><td>If <code>Available Quantity Less Than or Equal To [<=] 10</code>
And <code>Next PO Date Before Today</code>
Then <code>Available Quantity Equal [=] Available Quantity Reduce By [%] 10</code></td></tr>
</table>

Desired result: If product is AB200 or product is AB300, add 5 days to the next PO date.

Use when? You might use this type of rule to build a margin of error for products that you expect to typically ship late.

Calculation setup	In the probability rule wizard	Finished Rule
First, create a calculation: Before you can create this rule, you first need to create a calculation to include in the rule result, specifying how to reduce the available quantity in the search results. You use the Calculations window to work with calculations. You can advance to this screen by clicking *Calc* at the Probability Rules screen. At the *Calculations* window: 1. In first field, select *Next PO date* 2. In the second field, select *Plus days* 3. In the third field, select *Enter value...* and enter *5* in the window 4. Click *Save* This creates the calculation: `Next PO Date Plus Days 5`. Select *Cancel* to return to the Probability Rules screen.	1. At the *Rule Type* step, set the **Type of Rule** to *If* and click *Next* 2. At the *Conditions* step: • In the first field, select *System Product Code* • In the second field, select *Equal [=]* • In the third field, select *Enter value...*, and enter *AB100* 3. Click *Add* The If statement is added to the conditions area at the top of the screen. 4. Select the *Or* button 5. In the first field, select *System Product Code* 6. In the second field, select *Equal [=]* 7. In the third field, select *Enter value...*, and enter enter *AB200* 8. Click *Add* The Or statement is added to the conditions area at the top of the screen. 9. Click *Next* 10. At the *Then* step: • In the first field, select *Next PO date* • In the second field, select *Equal [=]* • In the third field, select the calculation created above 11. Click *Next* 12. At the *Review* step, click *Save*	If `System Product Code Equal To [=] AB100` Or `System Product Code Equal To [=] AB200` Then `Next PO Date Equal [=] Next PO Date Plus Days 5`

Desired result: If the order uses an express carrier, exclude location.

Use when? You might use this type to exclude locations that do not support express shipments.

In the probability rule wizard	Finished Rule
1. At the *Rule Type* step, set the **Type of Rule** to *If* and click *Next* 2. At the *Conditions* step: • In the first field, select *Express Carrier* • In the second field, select *Equal [=]* • In the third field, select *Yes* 3. Click *Add* The If statement is added to the conditions area at the top of the screen. 4. Click *Next* 5. At the *Then* step, select Exclude Location 6. Click *Next* 7. At the *Review* step, click *Save*	`If Express Carrier Equal To [=] Yes` `Then Exclude Location`

Desired result: If the available quantity divided by the sell quantity is less than the requested quantity, exclude the location.

Use when? You might use this rule for products you sell in a specified unit quantity, such as tires.

Calculation setup	In the probability rules wizard	Finished Rule
First, create a calculation: Before you can create this rule, you first need to create a calculation to include in the rule result, specifying how to reduce the available quantity in the search results. You use the *Calculations* window to work with calculations. You can advance to this screen by clicking *Calc* at the *Probability Rules* screen. At the *Calculations* window: 1. In first field, select *Available quantity* 2. In the second field, select *Divide [/]* 3. In the third field, select *Sell qty/multiple* 4. Click *Save* This creates the calculation: `Available Quantity Divide [/] Sell Qty/Multiple` (**Note:** The last few characters of the rule are truncated on the screen). Select *Cancel* to return to the *Probability Rules* screen.	1. At the *Rule Type* step, set the **Type of Rule** to *If* and click *Next* 2. At the *Conditions* step: • In the first field, select the calculation you created above (`Available Quantity Divide [/] Sell Qty/ Multiple`) • In the second field, select *Less Than [<]* • In the third field, select *Requested Quantity* 3. Click *Add* The If statement is added to the conditions area at the top of the screen. 4. Click *Next* 5. At the *Then* step: • Select *Exclude Location* • Click *Next* 6. At the *Review* step, click *Save*	If `Available Quantity Divide [/] Sell Qty/M Less Than [<] Requested Quantity` Then `Exclude Location`

How to update multiple fields? If you would like to update more than one field in the search results based on the same condition, you need to create a separate rule for each field.

For example, you might want to both reduce the available quantity displayed in search results, and increase the next PO date by 5 days for a certain master style that sells quickly and typically ships late. To do so, you could create the following rules:

1. *Rule to reduce the available quantity:*If `Master Style Equal To [=] KABSKU3` Then `Available Quantity Equal [=] Available Quantity Reduce By [%] 10`

2. *Rule to increase the next PO date:* If `Master Style Equal To [=] KABSKU3` Then `Next PO Date Equal [=] Next PO Date Plus Days 5`

Testing a Rule

Why test? Probability rules and their application can be quite complex. Before you start using a rule in a production environment, it is worthwhile to make sure that your rule settings have the intended result. Testing is even more important if you will use multiple rules that update different fields, or that are specified in different levels in the location hierarchy.

Before you start: Select a product that exists in representative locations and systems. Depending on the rule and your requirements, you might want to use a product with product locations that:

- are in both an online system and an offline system
- include rule attributes or metrics which are set to a positive number, a negative number, blank, or 0. For example, what if the rule says to divide the available quantity by the selling multiple, but no selling multiple is specified for a product location? What happens if the available quantity is a negative number or 0? (In a situation where a rule would require Order Broker to divide a number by 0, Order Broker skips the rule and evaluates the next rule in the hierarchy.

Troubleshooting:

- **If no rules apply:** Do you have the Use Probability Rules preference set to *Yes* at the *Preferences* screen?
- **If the rule does not apply to a product location as expected:**
  - **Rule active?** Use the *Probability Location* screen to confirm that the rule is active and not prohibited from the location based on date range. Start at the lowest level (location) and work upward to location type and finally organization.
  - **Correct type?** If the probability rule assignment at the *Probability Location* screen indicates a Type of off-line only or on-line only, use the *Systems* screen to confirm that the system matches the selected type. Even if the system is flagged as online at the Systems screen, Order Broker considers it off-line if it cannot obtain an interactive inventory update from the system. This might occur if communications are down between Order Broker and the external system.
  - **Did you fail to save the rule details?** If you forgot to click *Save* when using the *Probability Rule Wizard*, your entries were not saved.
  - **Did Order Broker skip the rule because it would have required dividing by 0?** Check the information for the product location.
  - **Field already updated by another rule?** For example, if two rules apply to the same field (such as available quantity), and one has a lower sequence number, Order Broker might apply that rule first and never evaluate the rule with the higher sequence number.
  - **If the rule does not apply at all:** If the *Probability Rules* setting at the *Event Logging* screen is set to *Detailed*, Oracle staff will be able to use the logs to review any probability rule errors or activity.
  - Confirm that the effect of the rule is not obscured by rounding. For example, if the rule indicates to reduce the available quantity by the shrink rate, and if a shrink rate of 5% is applied to an available quantity of 10, the resulting available quantity of 9.5 is rounded up and displayed as 10.
  - **Does the rule involve the requested quantity?** Certain systems, such as Order Management System, do not include a requested quantity for a locate items search unless you search from order entry.
  - **Does the rule relate to the available quantity?** If the *Available Quantity* differs from the *Available to Promise* quantity for a product location, the probability rule uses the *Available to Promise* quantity. For example:

* The available quantity is 100, and the available to promise quantity is 80. If the rule requires that the available quantity be greater than 90, the rule does not apply.
* The available quantity is 50, the available to promise quantity is -10, and the next PO quantity is 100. If the rule specifies to set the available quantity to available quantity plus next PO quantity, the resulting available quantity is 90 (-10 + 100).

Browse Probability Rules

Purpose: Use the **Browse Probability Rules** window to review probability rules you have set up through the *Probability Rule Wizard*.

Used for the Routing Engine module.

For more information: For a brief overview of probability rules, see *Using Probability Rules*; and for more details, see *Probability Rule Overview*.

Rule not eligible Inventory Quantity Export Calculation: A message indicates if the rule cannot apply to the inventory quantity export, since the records are created without being associated with an order. This message is displayed for rules that are based on express carrier, order type, originating system, last updated date, today, or requested quantity as a condition. See the *Inventory Quantity Export* for more information.

How to display this window: Click a probability rule once at the *Probability Rules* screen.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probability Rules* authority can display this screen. See the *Role Wizard* for more information.

Options at this window

Option	Procedure
edit the displayed probability rule	Click *Edit* to advance to the *Probability Rule Wizard* screen.
review the next probability rule	Click the next icon ( ) to display the next probability rule.
review the previous probability rule	Click the previous icon ( ) to display the previous probability rule.

Fields at this window

Field	Description
Name	The description of the probability rule. The name can be up to 40 positions, and can include spaces and special characters.
Rule details	The details of the rule you created through the *Probability Rule Wizard*.

Probability Location

Purpose: Use the **Probability Location** screen to:

- assign probability rules to an organization, location type, or location
- change settings, including sequence number, type, date range, and active/inactive flag, for a probability location assignment
- review the probability rules that are assigned to an organization, location type, or location

Used for the Routing Engine module.

For more information: See *Probability Rule Wizard* for an overview on probability rules, and for information on creating and testing rules, and for sample rules.

Probable quantity rules: You use the *Probable Quantity Location* screen rather than this screen to assign probable quantity rules, which update the *probable quantity* that a system, such as your ecommerce site, can use as an estimate of an item's availability. For more information on probable quantity rules and calculation of the probable quantity, see:

- the *Probable Quantity Rules* screen
- the *Probable Quantity Location* screen
- the *Probable Qty Export* tab at the *System* screen

How to display this screen: Select *Probability Location* from the *Home Screen* or from the *Products Menu*.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probability Location* authority can display this screen. See the *Role Wizard* for more information.

Assigning Rules

When do rules apply? Rules do not apply to product locations until you assign them at the *Probability Location* screen. The way Order Broker determines whether to apply a rule is described below.

Evaluate rules? When it receives a locate item request or a submit order request that does not specify a fulfilling location, Order Broker evaluates a product location for probability rules if:

- the *Use probability rules* preference applies to the organization; see the *Preferences* screen

- the location is within the search radius, if proximity rules apply; see *Proximity Locator Searching*
- the requested product is stocked in the location (that is, the product location exists)

Evaluate a specific rule? In order for Order Broker to evaluate a product location for a specific probability rule, it reviews the probability location:

- *status:* The probability location assignment for the rule must have a status of *Active*.
- *date range:* Specifying a “from” or “to” date for the probability location is optional; however, if either is specified, the current date must be on or after the “from” date (if any) and before the “to” date (if any) for the rule to apply.
- *on-line or off-line?* The probability location *Type* specifies whether the rule applies to on-line inventory information, off-line information, or both. The *Type* specified for the probability location must match the type of inventory to be supplied for the product location in this locate items search, based on whether Order Broker receives an interactive inventory inquiry response from the system when it processes the locate items search. See *inventory level type* for more information.
- *Field already updated?* Once Order Broker has updated a field in the locate items or submit order search results (the available quantity, the next expected purchase order date, or the next expected purchase order quantity for a product location), it stops evaluating rules that update that particular field.

> **Note:**
>
> Probability rules do not actually update the field in the product location record; they only update the information returned in the search results for a locate items request or used to select the product location for a submit order request.

- *Exclude location?* If a probability location rule specifies to exclude a product location, and the product location meets the criteria for that rule, then that product location is excluded from the locate item or Routing Engine shopping search results regardless of whether another rule has applied to any of the fields.

Rule hierarchy: In evaluating probability locations, Order Broker uses the same hierarchy described under *Proximity Locator Searching*, namely:

1. lowest level: *location*
2. next level: *location type*
3. highest level: *organization*

This hierarchy applies independently to each of the fields that can be updated through probability rules. For example, you can have:

- a rule to update the next purchase order date set up at the location level
- rules to update the available quantity at the location level and at the location type level; in this case, the rule set up at the location level is takes precedence and is evaluated first

Once Order Broker updates a field, it stops evaluating other rules related to that same field. For example, if a rule at the location level updated the available quantity, a rule at the location type level that is also related to available quantity is not evaluated. However, a rule that specifies to exclude a location overrides any other rule, regardless of its position in the hierarchy.

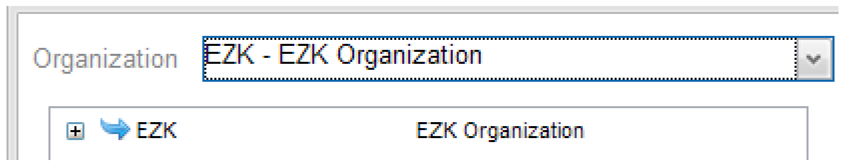
Setting up rule conditions at each level: You can set the conditions for a particular rule differently at any point in the hierarchy. For example, you can specify a date range for a particular location, but leave the “from” and “to” dates blank at the location type level. Order Broker always starts checking at the lowest level (that is, *location*) and works its way up through the hierarchy until it finds a setting. However, be sure to avoid setting up rule conditions so complex that the results are not easily predictable.

What if multiple rules exist at the same level? It is possible to assign multiple rules at the same level, either location, location type, or organization. In this situation, Order Broker first evaluates the rule with the lowest sequence number.

Options at this screen

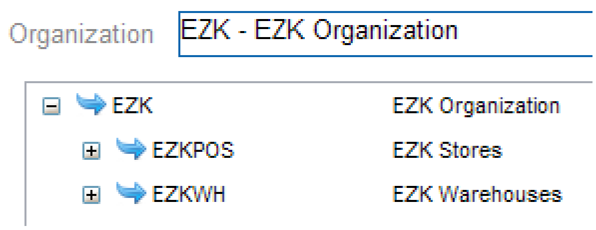
<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>review the levels for rule assignment or review</td><td>

1. The *organization* associated with your *Default Shipping System* is selected by default. A blue arrow ( ) next to the organization name indicates if there are any rules assigned at any level within the organization. Optionally, you can select a different organization



.

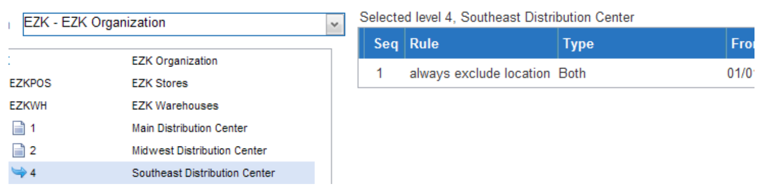
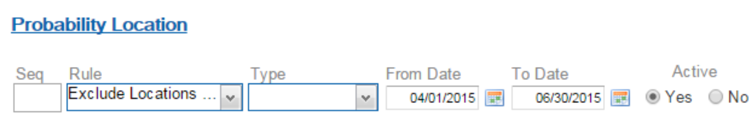
2. Optionally, click the plus sign next to the organization to display each *Location Type* for the organization if they are not already displayed. Again, a blue arrow next to the location type name indicates if there are any rules assigned at any level within the location type.



3. If the organization includes a location type that does not include any locations, the location type is not displayed.
4. You might need to increase the zoom in your browser in order to display the blue arrows.
5. The hierarchy may not be displayed correctly until you assign a default shipping system to the default admin user. See *Assign the default shipping system to the default user* for more information.
6. Optionally, click the plus sign next to a location type to display each *Location* for the type if they are not already displayed. A blue arrow next to a location indicates if there are any rules assigned to that particular location.

Sort order: This screen sorts all displayed records in alphanumeric order within each organization. In other words, organizations are listed alphanumerically by name, as are location types within an organization, and locations within a

</td></tr>
</table>

Option	Procedure
	location type. Since the sort is alphanumeric, numeric codes are listed before alphabetical codes; for example, location *123* is listed before location *ABC*.
select location type or location for rule assignment or review, or select a different organization	Highlight the location type or location to display the rules that are currently assigned at that level, or select a different organization from the drop-down list. Note that the currently selected location level is indicated above any assigned rules. 
assign a probability rule	Use the navigational fields in the left-hand pane to select the organization, location type, or location where the rule should apply, as described above. You can assign a rule at only one level at a time; however, rules you set at the organization level or location type level apply to all lower levels, unless they are overridden by another rule at a lower level. See *Probability Rule Overview* for background. Use the fields at the top of the screen to select the rule and optionally specify a date range or reset the *Active* flag. **Rule not displayed?** If you create or update the name of a probability rule while the **Probability Location** screen is open, the new or renamed rule is not available for assignment until you close the **Probability Location** screen and reopen it. 

Option	Procedure
	1. Enter a *Seq (sequence number)* to use for the rule assignment. Rules with the lowest sequence numbers are evaluated first, and when you add a new rule, Order Broker reassigns the sequence numbers. 2. Select the *Name* of the rule you would like to assign from the drop-down list. 3. Set the *Type* field to *Off-line* only, *On-line* only, or leave it set to *Both* to indicate whether the rule is conditional based on an interactive inventory update. See *inventory level type* for a discussion. 4. Optionally, enter an *From (Effective From Date)* to have the rule become effective on that date. 5. Optionally, enter an *To (Effective To Date)* in to have the rule no longer effective on that date. **Note:** You can specify an Effective From Date, an Effective To Date, both, or neither. 6. Optionally, reset the *Active* flag if the rule should not be created in active status. 7. Click *Save* to create the new rule assignment.
update a probability rule assignment	1. Use the navigational fields in the left-hand pane to select the organization, location type, or location where the rule should apply, as described above. 2. Click the assignment to highlight it. The rule and its current settings default to the fields at the top of the screen. 3. Use the fields at the top of the screen to enter the updated information as needed. You can change the *Seq (sequence number)*, *Type*, *From (Effective From Date)*, *To (Effective To Date)*, and *Active* flag. 4. Click *Save* to apply your changes.

Option	Procedure
delete a probability rule assignment	1. Use the navigational fields in the left-hand pane to select the organization, location type, or location where the rule should apply, as described above. 2. Click the delete icon ( ) next to the rule to delete it. **Note:** Deleting a rule at the organization or location type level does not automatically delete a rule assignment for the same rule at a lower level in the hierarchy. Also, deleting a rule assignment does not delete the rule itself.

Fields at this screen

Field	Description
Heading fields	

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Seq (sequence number)</td><td>The sequence in which Order Broker should evaluate rules assigned at this level. A lower sequence number indicates to evaluate the rule earlier; that is, a rule with a sequence number of 10 is evaluated before one with a sequence number of 20. Optional entry.

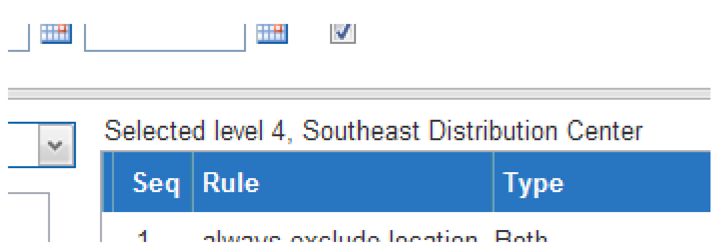
Rule entries and sequence number assignments: Order Broker maintains sequence numbers that are multiples of 10, and resequences existing rules to accommodate your entries:

First rule assignment: The first rule assignment takes sequence number 10.
To create a new highest-priority rule: If you enter a sequence number lower than 10, the rule is assigned sequence number 10, and the existing rules are assigned higher sequence numbers that are multiples of 10. For example, if there were rules assigned sequence numbers 10 and 20, and you enter sequence number 1, the new rule is assigned sequence number 10 and the existing rules change to 20 and 30.
To insert a rule into the existing hierarchy: If you enter a sequence number that is between 2 currently assigned numbers, the rule is assigned the next multiple of 10, and the higher rules are resequenced accordingly. For example, if you have rules assigned to sequence numbers 10 and 20, and you enter a sequence number of 15, the new rule is assigned sequence number 20 and the existing rule that was assigned sequence number 20 changes to sequence number 30.
To add a rule a new lowest-priority rule: If you enter a sequence number that is higher than any currently assigned sequence number, the rule is assigned the next available multiple of 10. For example, if you have rules assigned sequence numbers 10, 20, and 30, and you enter a sequence number of 99, the new rule is assigned sequence number 40.

Note:

If you do not enter a sequence number, Order Broker assigns the rule to the next available multiple of 10. For example, if there is currently a rule assigned sequence number 20, Order Broker assigns the new rule sequence number 30.
Updating a rule: When you update a rule assignment and enter a sequence number, Order Broker uses the same logic described above to determine the sequence number assignment; however, if the sequence number is blank when you update an existing rule assignment, the updated rule is reassigned sequence number 10, and the remaining rules are resequenced.

See Probability Rule Overview for more information on how Order Broker applies probability rules to product locations.</td></tr>
<tr><td>Name</td><td>The Name of the rule. You can select a rule by highlighting its name in the drop-down box. Required.</td></tr>
<tr><td>Type</td><td>Indicates whether to apply the rule to off-line product locations, on-line product locations, or both. Defaults to BOTH. Required. See inventory level type for a discussion.</td></tr>
<tr><td>From (Effective From Date)</td><td>The date when the rule becomes effective. Optional.</td></tr>
</table>

Field	Description
To (Effective To Date)	The first date when the rule is no longer effective. Optional.
Active	Indicates whether Order Broker should evaluate the rule or not to determine whether to apply it to a product location. Possible settings are: • *Yes:* Order Broker should evaluate the rule and apply it if the product location qualifies. • *No:* Order Broker should not evaluate the rule.
Navigational fields	These fields are in the left-hand side of the screen, below the heading information. See *review the levels for rule assignment or review*, above, for information on advancing through these fields to display rule assignments for a specific organization, location type, and location.
Organization	A *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.
Location Type	A *location type*.
Location	A *location*. The location code is also displayed. *Rule assigned?* A blue arrow ( ) next to the organization, location type, or location indicates if there are any rules assigned at that level or below. **Note:** To refresh the display of the blue arrows based on your activity at this screen, close the **Probability Location** screen and re-enter.
Selected level	When you highlight an *organization*, *location type*, or *location* in the left-hand pane, the code and description are displayed in the center of the screen above any rules that apply to the selection. 
Results fields	**How to update an assigned rule:** See *update a probability rule assignment*, above.
Seq (Sequence Number)	The sequence in which Order Broker should evaluate the rule compared with other rules assigned at this level. Order Broker assigns sequence numbers in multiples of 10. A lower sequence number indicates to evaluate the rule earlier; that is, a rule with a sequence number of 10 is evaluated before one with a sequence number of 20. See *Probability Rule Overview* for more information on how Order Broker applies probability rules to product locations.

Field	Description
Name	The Name of the rule. **Note:** If the name of the rule is too long to display in the space allotted. you can position your cursor over this field to display the full name.
Type	Indicates whether to apply the rule to off-line product locations, on-line product locations, or both. See *inventory level type* for a discussion.
From (Effective From Date)	The date when the rule becomes effective. If no date is specified, the rule is effective without regard to start date.
To (Effective To Date)	The first date when the rule is no longer effective. If no date is specified, the rule is effective without regard for end date.
Active	Indicates whether Order Broker should evaluate the rule to determine whether to apply it to a product location. Possible settings are: • *Selected:* Order Broker should evaluate the rule and apply it if the product location qualifies. • *Unselected:* Order Broker should not evaluate the rule.
Delete	Select the delete icon ( ) next to a probability rule assignment to delete the rule assignment.

Probable Quantity Rules

Purpose: Use the **Probable Quantity Rules** screen to review or work with existing probable quantity rules, or create new rules.

Used for the Routing Engine module.

What is a probable quantity rule? A probable quantity rule is a probability rule that applies only to calculation of the *probable quantity*, an estimate of available quantity that a system, such as your ecommerce site, can retrieve in order to more accurately present an item's availability.

Calculated when? The probable quantity export program calculates the probable quantity. See the *Inventory Quantity Export* of the **System** screen for information on scheduling or running the export program.

Assigning and applying rules: You use the *Probable Quantity Location* screen to assign a rule to a location type or to a location. If you specify a system product or master style as criteria for the rule, the rule applies only to product locations that match your entries.

Each rule applies only to the location type or location where it is assigned.

> **Note:**
>
> Probable quantity rules based on department, class, or category are not currently supported; also, probability rules assigned to a specific location might not be applied during the probable quantity export. See *Evaluating Probable Quantity Rules* for a discussion.

Rule hierarchy: See *Evaluating Probable Quantity Rules* for a discussion of how the probable quantity update program selects a probability rule if a product location qualifies for multiple rules.

Routing Engine probability rules: See the *Probability Rule Wizard* for more information on probability rules that apply to locate items searches and order assignment, rather than the probable quantity calculation.

How to display this screen: Select *Probable Rules* from the *Products Menu*.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probable Quantity Rules* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
create a probable quantity rule	1. Enter a Rule Name of up to 40 positions. 2. Click *New*. If the rule already exists, the screen displays an error message. Otherwise, you advance to the *New Probable Quantity Rule* window, where you can complete creation of the rule. **Note:** If you click *Cancel* at the *New Probable Quantity Rule* window, the rule is not created.
search for a probable quantity rule	Enter a full or partial Rule Name and click *Search* to display rules whose names include your entry. **Case?** The Rule Name field is case-sensitive for searching; for example, an entry of `add` does not match a rule name of `Add`.
select a rule for review or maintenance	Click the edit icon ( ) next to a rule to advance to the *Edit Probable Quantity Rule* window.
delete a rule	Select the delete icon ( ) next to a rule to delete it. **Note:** You cannot delete a rule that is assigned to any location types or locations. Use the *Probable Quantity Location* screen to review or work with rule assignments.

New Probable Quantity Rule

Purpose: Use the **New Probable Quantity Rule** window to complete creation of a probable quantity rule.

Used for the Order Broker module.

What is a probable quantity rule? A probable quantity rule is a probability rule that applies only to calculation of the *probable quantity*, an estimate of available quantity that a system, such as your ecommerce site, can retrieve in order to more accurately present an item's availability.

Calculated when? The probable quantity update program calculates the probable quantity. See the *Inventory Quantity Export* at the **Schedule Jobs** screen for information on scheduling or running the probable quantity update program, and see *Evaluating Probable Quantity Rules* for a process overview and background.

Assigning and applying rules: You use the *Probable Quantity Location* screen to assign a rule to a location type or to a location. If you specify a system product or master style as criteria for the rule, the rule applies only to matching product locations.

Each rule applies only to the location type or location where it is assigned.

Rule hierarchy: See *Evaluating Probable Quantity Rules* for a discussion of how the probable quantity update program selects a probability rule if a product location qualifies for multiple rules.

Routing Engine probability rules: See the *Probability Rule Wizard* for more information on probability rules that apply to locate items searches and order assignment rather than to the probable quantity calculation.

How to display this screen: Enter a Rule Name of up to 40 positions at the *Probable Quantity Rules* screen and click *New*.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probable Quantity Rules* authority can display this screen. See the *Role Wizard* for more information.

Creating a rule

To complete creation of a probable quantity rule:

1. Optionally, edit the Rule Name you entered at the previous screen.
2. Optionally, specify selection criteria for the rule:
3. System Product code, or
4. Master Style, or
5. Department, Class, or Category
6. Select the Operator that indicates how to increase, decrease, or set the probable quantity.
7. Enter the Value that indicates how to calculate the probable quantity.

8. Click *Save*.

Fields at this window

Field	Description
Rule Name	The description of the rule. Up to 40 positions. Required.
Optional Conditions	Optionally, use the following fields to restrict the rule to products that match the specified criteria. The rule must be assigned to the product location's location type or location in order to apply. All entries are free-form text.
System Product	The *system product* code identifying the product in a particular system that is eligible for the rule. Up to 35 positions. Optional. If you specify a system product, you cannot also specify a master style, department, class, or category.
Master Style	The *master style* identifying system products that are eligible for the rule. Up to 35 positions. Optional. If you specify a master style, you cannot also specify a system product, department, class, or category.
Department	The department identifying products eligible for the rule. See the *New Product* screen for background. Up to 40 positions. Optional. • If you specify a department, you cannot also specify a system product or a master style. • If you specify a class or a category as well as a department, the product must match all entered values for the rule to apply.
Class	The class identifying products that are eligible for the rule. See the *New Product* screen for background. Up to 40 positions. Optional. • If you specify a class, you cannot also specify a system product or a master style. • If you specify a department or a category as well as a class, the product must match all entered values for the rule to apply.
Category	The category identifying products that are eligible for the rule. See the *New Product* screen for background. Up to 40 positions. Optional. • If you specify a category, you cannot also specify a system product or a master style. • If you specify a department or a class as well as a category, the product must match all entered values for the rule to apply.
Calculation	The following fields define the calculation applied by the rule.

Field	Description
Operator	Indicates how to increase, decrease, or set the probable quantity based on the *Available to Promise* quantity (the available quantity minus the reserved quantity as well as any fulfilled quantity for the product location: • *Minus [-]*: probable quantity = Available to Promise quantity minus the Value *Example:* Available to Promise quantity of 100 minus Value of 10 = probable quantity of 90 • *Plus [+]*: probable quantity = Available to Promise quantity plus the Value *Example:* Available to Promise quantity of 50 plus Value of 10 = probable quantity of 60 • *Reduce by [%]*: probable quantity = Available to Promise quantity minus the Value percentage *Example:* Available to Promise quantity of 1000 minus Value percentage of 15 = probable quantity of 850 • *Increase by [%]*: probable quantity = Available to Promise quantity plus the Value percentage *Example:* Available to Promise quantity of 1000 plus Value percentage of 15 = probable quantity of 1150 • *Equals [=]*: the probable quantity = the Value *Example:* probable quantity = Value of 9999 Required to update the probable quantity.
Value	The value to use in the calculation of the probable quantity, as described above. Up to 4 positions. Required to update the probable quantity.

Edit Probable Quantity Rule

Purpose: Use the **Edit Probable Quantity Rule** window to review or edit a probable quantity rule.

Used for the Routing Engine module.

What is a probable quantity rule? A probable quantity rule is a rule that applies only to calculation of the *probable quantity*, an estimate of available quantity that a system, such as your ecommerce site, can retrieve in order to more accurately present an item's availability.

Calculated when? The probable quantity update program calculates the probable quantity. See the *Inventory Quantity Export* at the **Schedule Jobs** screen for information on scheduling or running the probable quantity update program, and see *Evaluating Probable Quantity Rules* for a process overview and background.

Assigning and applying rules: You use the *Probable Quantity Location* screen to assign a rule to a location type or to a location. If you specify a system product or master style as criteria for the rule, the rule applies only to matching product locations.

Each rule applies only to the location type or location where it is assigned.

Rule hierarchy: See *Evaluating Probable Quantity Rules* for a discussion of how the probable quantity update program selects a probability rule if a product location qualifies for multiple rules.

Routing Engine probability rules: See the *Probability Rule Wizard* for more information on probability rules that apply to locate items searches and order assignment rather than the probable quantity calculation.

How to display this screen: Click the edit icon ( ) for an existing rule at the *Probable Quantity Rules* screen.

Note:

Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probable Quantity Rules* authority can display this screen. See the *Role Wizard* for more information.

Fields at this window

Field	Description
Rule Name	The description of the rule. Up to 40 positions. Required.
Optional Conditions	Optionally, use the following fields to restrict the rule to products that match the specified criteria. The rule must be assigned to the product location's location type or location in order to apply. All entries are free-form text.
System Product	The *system product* code identifying the product in a particular system that is eligible for the rule. Up to 35 positions. Optional. If you specify a system product, you cannot also specify a master style, department, class, or category.
Master Style	The *master style* identifying system products that are eligible for the rule. Up to 35 positions. Optional. If you specify a master style, you cannot also specify a system product, department, class, or category.
Department	The department identifying products eligible for the rule. See the *New Product* screen for background. Up to 40 positions. Optional. • If you specify a department, you cannot also specify a system product or a master style. • If you specify a class or a category as well as a department, the product must match all entered values for the rule to apply.
Class	The class identifying products that are eligible for the rule. See the *New Product* screen for background. Up to 40 positions. Optional. • If you specify a class, you cannot also specify a system product or a master style. • If you specify a department or a category as well as a class, the product must match all entered values for the rule to apply.
Category	The category identifying products that are eligible for the rule. See the *New Product* screen for background. Up to 40 positions. Optional. • If you specify a category, you cannot also specify a system product or a master style. • If you specify a department or a class as well as a category, the product must match all entered values for the rule to apply.
Calculation	The following fields define the calculation applied by the rule.

Field	Description
Operator	Indicates how to increase, decrease, or set the probable quantity based on the *Available to Promise* quantity (the available quantity minus the reserved quantity as well as any fulfilled quantity for the product location: • *Minus [-]*: probable quantity = Available to Promise quantity minus the Value *Example:* Available to Promise quantity of 100 minus Value of 10 = probable quantity of 90 • *Plus [+]*: probable quantity = Available to Promise quantity plus the Value *Example:* Available to Promise quantity of 50 plus Value of 10 = probable quantity of 60 • *Reduce by [%]*: probable quantity = Available to Promise quantity minus the Value percentage *Example:* Available to Promise quantity of 1000 minus Value percentage of 15 = probable quantity of 850 • *Increase by [%]*: probable quantity = Available to Promise quantity plus the Value percentage *Example:* Available to Promise quantity of 1000 plus Value percentage of 15 = probable quantity of 1150 • *Equals [=]*: the probable quantity = the Value *Example:* probable quantity = Value of 9999 Required to update the probable quantity.
Value	The value to use in the calculation of the probable quantity, as described above. Up to 4 positions. Required to update the probable quantity.

Probable Quantity Location

Purpose: Use the **Probable Quantity Location** screen to assign probable quantity rules to location types or locations.

Used for the Routing Engine module.

What is a probable quantity rule? A probable quantity rule is a probability rule that applies only to calculation or update of the *probable quantity*, an estimate of available quantity that a system, such as your ecommerce site, can retrieve in order to more accurately present an item's availability.

Calculated when? The probable quantity update program calculates the probable quantity. See the *Inventory Quantity Export* at the **Schedule Jobs** screen for information on scheduling or running the probable quantity update program, and see *Evaluating Probable Quantity Rules* for background.

Creating rules: Use the *Probable Quantity Rules* screen to review and work with probable quantity rules.

Assigning multiple rules: Only one rule can apply when calculating the probable quantity. If a product location qualifies for multiple rules, based on rule criteria and assignment, the program applies only the *last possible rule* as follows to calculate the *probable quantity*:

- First, evaluate rules assigned to the location type:

no matching required

matching master style

matching system product

- Next, evaluate rules assigned to the location, using the same sequence listed above.

Example: For a particular product, rules have been assigned to:

1. the location type, specifying a matching master style
2. the location, without any matching required
3. the location, specifying a matching system product

Result: The rule that is assigned at the location level and specifies a matching system product is applied to the product location and updates the probable_qty.

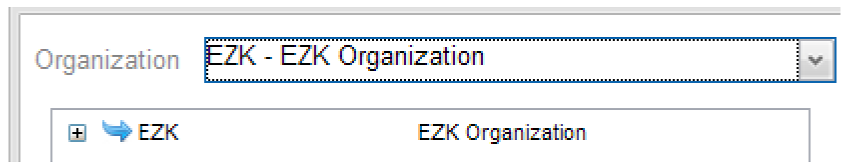
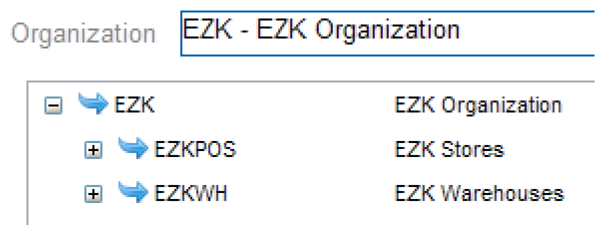
You can assign up to 10 rules at any one level.

For accurate calculation of the probable_qty, do not apply multiple probable quantity rules at the same level and with the same criteria.

How to display this screen: Select *Probable Quantity Location* from the *Products Menu*.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Probable Quantity Location* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
review the levels for rule assignment or review	1. The *organization* associated with your *Default Shipping System* is selected by default. A blue arrow ( ) next to the organization name indicates if there are any rules assigned at any level within the organization. Optionally, you can select a different organization.  2. Optionally, click the plus sign next to the organization to display each *Location Type* for the organization if they are not already displayed. Again, a blue arrow next to the location type name indicates if there are any rules assigned at any level within the location type.  3. Optionally, click the plus sign next to a location type to display each *Location* for the type if they are not already displayed. A blue arrow next to a location indicates if there are any rules assigned to that particular location.  **Sort order:** This screen sorts all displayed records in alphanumeric order within each organization. In other words, organizations are listed alphanumerically by name, as are location types within an organization, and locations within a location type. Since the sort is alphanumeric, numeric codes are listed before alphabetical codes; for example, location *123* is listed before location *ABC*. **Note:** The hierarchy may not be displayed correctly until you assign a default shipping system to the default admin

Option	Procedure
	user. See *Assign the default shipping system to the default user* for more information.
select location type or location for rule assignment or review, or select a different organization	Highlight location type or location to display the rules that are currently assigned at that level, or select a different organization from the drop-down list. Note that the currently selected location level is indicated above any assigned rules.
assign a probable quantity rule	1. Use the navigational fields in the left-hand pane to select the organization and location type or location where the rule should apply, as described above. You can assign a rule at only one level at a time; however, rules you set at the location type level apply to locations of that type, unless they are overridden by another rule at the location level. 2. Use the Rule field at the top of the screen to select the rule 3. Click *Save* to assign the rule. **Rule not displayed?** If you create or update the name of a probable quantity rule while the **Probable Quantity Location** screen is open, the new or renamed rule is not available for assignment until you close the **Probable Quantity Location** screen and reopen it.
remove a probable quantity rule assignment	1. Use the navigational fields in the left-hand pane to select the organization and location type or location where the rule should apply, as described above. 2. Click the delete icon ( ) next to the rule to delete it. **Note:** Deleting a rule assignment at the location type level does not automatically delete a rule assignment of the same rule at the location level. Also, deleting a rule assignment does not delete the rule itself.

Fields at this screen

Field	Description
Rule	The description of the probable quantity rule, as entered at the *New Probable Quantity Rule* window or the *Edit Probable Quantity Rule* window. Select a rule from the dropdown field to assign it to the currently selected location type or location.
Navigational fields	These fields are in the left-hand side of the screen, below the heading information. See above for information on advancing through these fields to display rule assignments for a specific location type or location.
Organization	A *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.
Location Type	A *location type*.

Field	Description
Location	A *location*. The location code is also displayed. **Note:** Rules assigned at the location level are eligible to be applied only if another activity, such as an inventory import, updates the product location. *Rule assigned?* A blue arrow ( ) next to the organization, location type, or location indicates if there are any probable quantity rules assigned at the location type or location level. **Note:** To refresh the display of the blue arrows based on your activity at this screen, close the **Probable Quantity Location** screen and re-enter.
Selected level	When you highlight an *organization*, *location type*, or *location* in the left-hand pane, the code and description are displayed in the center of the screen above any rules that apply to the selection.
Rule	The description of each probable quantity rule currently assigned at the displayed level.
Delete	Select the delete icon ( ) next to a probable quantity rule assignment to delete the rule assignment.

10 Locations Menu

- *Organizations and Preferences*
  - *Preferences*: Used for the Routing Engine module. Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Drop Ship Preferences*: Used for the Supplier Direct Fulfillment module. Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Store Connect Preferences*: Used for the Store Connect module. Available if Use Store Connect is selected at the *Tenant* screen.
- *Order Broker Preference Overrides*: Used for the Routing Engine module. Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Edit Order Broker Preference Override*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Browse Order Broker Preference Override*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Locations*
  - *New Location*
  - *Edit Location*
  - *Location Attributes*: Used for the Routing Engine module.
    - *New Location Attribute*: Used for the Routing Engine module.
    - *Edit Location Attribute*: Used for the Routing Engine module.
- *Location Bulk Updates*: Used for the Routing Engine module.
- *Fulfillment Zones*: Used for the Routing Engine module. Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Fulfillment Zone Wizard*: Available if Use Routing Engine is selected at the *Tenant* screen.
  - *Browse Fulfillment Zones*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Vendors*: Available if Use Vendor Portal is selected at the *Tenant* screen. Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *New Vendor*: Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Edit Vendor*: Available if Use Vendor Portal is selected at the *Tenant* screen.

Organizations and Preferences

Purpose: Use the **Organizations and Preferences** screen to advance to the *Preferences*, *Drop Ship Preferences*, or *Store Connect Preferences* screen for an organization.

Location relationships: See *Organization, System, and Location* for an overview of the relationships among **Order Broker** elements, including organizations.

How are organizations created? You need to create each organization through the *Organizations* screen in Modern View. See *Setting Up Data for the Routing Engine Module* for background.

How to display this screen: Select *Organizations and Preferences* from the *Home Screen* or from the *Locations Menu*.

> **Note:**
>
> Only users with *Organization and Preferences* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
search for an organization	Use one or both of the fields at the top of the screen to restrict the search results to matching organizations: • Enter a full or partial organization code in the *Organization* field to restrict your results to organizations starting with your entry. • Enter a full or partial name in the *Name* field to restrict your results to organizations whose names contain your entry. • Click *Search*. **Case?** Both the Organization and the Name fields on this screen are case-sensitive for searching; for example, an entry of `o` does not match an organization of `Org`.
work with Order Broker preferences	Available if Use Routing Engine is selected at the *Tenant* screen. Click the *Order Broker Preferences* icon ( ) for an organization to advance to the *Preferences* screen, where you can work with Routing Engine settings and other controls available at the *organization*, *location type*, or *location* level.
work with Drop Ship (Supplier Direct Fulfillment) preferences	Available if Use Vendor Portal is selected at the *Tenant* screen. Click the *Drop Ship Preferences* icon ( ) for an organization to advance to the *Drop Ship Preferences* screen, where you can work with Supplier Direct Fulfillment preferences related to the Vendor Portal and related emails.
work with Store Connect preferences	Available if Use Store Connect is selected at the *Tenant* screen. Click the Click the *Store Connect Preferences* icon ( ) for an organization to advance to the *Store Connect Preferences* screen, where you can work with preferences related to the Store Connect module. **Note:** The *Store Connect Preferences* screen is available only if you have flagged a system as the *Store Connect Default*. See the *Systems* screen or *Setting Up Data for the Store Connect Module* for more information.

Fields at this screen

Field	Description
Search fields:	
Organization	See *organization*. The organization code can be 1 to 10 positions long, can include spaces and special characters, and must be unique within Order Broker. Case-sensitive for searching; for example, an entry of `org` does not match an organization code of `Org`.
Name	The name of an organization. The name can be from 1 to 35 positions long and can include spaces and special characters. Case-sensitive for searching; for example, an entry of `org` does not match an organization name of `Org`.
Results fields:	
Organization	See *organization*.
Name	The name of an organization. Display-only.
System	The *default system* for the organization. Display-only.
Order Broker Preferences	Click the *Order Broker Preferences* icon ( ) for an organization to advance to the *Preferences* screen, where you can work with Routing Engine settings and other controls available at the *organization*, *location type*, or *location* level.
Drop Ship Preferences	Click the *Drop Ship Preferences* icon ( ) for an organization to advance to the *Drop Ship Preferences* screen, where you can work with Supplier Direct Fulfillment preferences related to the Vendor Portal and related emails.
Store Connect Preferences	Click the *Store Connect Preferences* icon ( ) for an organization to advance to the *Store Connect Preferences* screen, where you can work with preferences related to the Store Connect module. **Note:** The *Store Connect Preferences* screen is available only if you have flagged a system as the *Store Connect Default*. See the *Systems* screen or *Setting Up Data for the Store Connect Module* for more information.

Preferences

Purpose: Use the **Preferences** screen to work with options such as the *Order Broker Settings Tab* and other controls available at the *organization*, *location type*, or *location* level. Within the preferences, for example, you can indicate whether to use *proximity locator* logic or probability rules, and how the Routing Engine works.

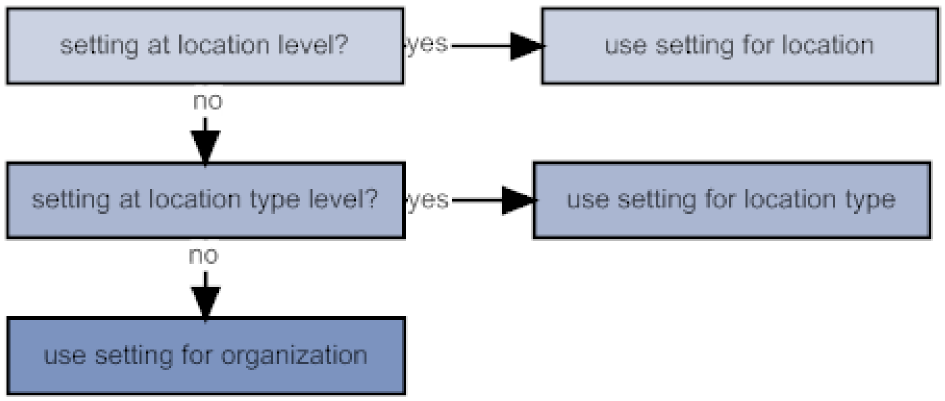
Used for the Routing Engine module.

Drop ship preferences: Use the *Drop Ship Preferences* screen to set preferences related to the Supplier Direct Fulfillment module.

Store Connect preferences: In addition to completing the **Preferences** screen, use the *Store Connect Preferences* screen to set additional preferences related specifically to the Store Connect module.

Location relationships: See *Data Hierarchy* for an overview of the **Order Broker** organization, system, and location hierarchy.

Applying a preference: Set each preference at the lowest level in the hierarchy where it should apply. When determining the preference for an individual location, Order Broker uses the first defined preference it finds, starting at the location level and then working up to the location type level, then finally the organization level. For example, if you set a preference to *Not Defined* at the location level, the setting at the location type level applies.



Example:

Required result: All US stores should use proximity locator logic except for the Natick store. The US store locations are assigned to the *location type* of *US Store*.

Correct preference settings: Set Use Proximity Locator for US Stores to *Yes*, but set it to *No* for the Natick store location only.

> **Note:**
>
> **Important:** You need to set all preferences at the organization level before integrating any external systems with Order Broker. If you leave any of the preferences at this level set to blank, there will be errors when you attempt to begin processing messages between Order Broker and any system that uses the organization.

Additional settings: In addition to the **Preferences** screen, the following screens include settings that control the function of the Routing Engine:

To set up:	Use the:
database connection information	• *System* screen
email addresses for notifications	• *Event Logging* screen for Order Broker-wide notifications • *System* screen for notifications for specific systems (to receive the *Order Broker Polling Status Email* if the system's Require Status Update flag is selected)
organization default system	• *System* screen
logging	• *Event Logging* screen

To set up:	Use the:
online or offline setting	• *System* screen
polling retries and status update requirement	• *System* screen
probability rules	• *Probability Rules* screen to create the rules • *Probability Location* screen to assign the rules to locations, location types, or an organization **Note:** Use the *Probable Quantity Rules* screen to set up rules for the probable quantity update, and use the *Probable Quantity Location* screen to assign the rules to locations or location types.
product and product location import schedule	• *Schedule Jobs* screen
reserved inventory settings	• *System* screen
drop ship preferences	• *Drop Ship Preferences* screen
Store Connect preferences	• *Store Connect Preferences* screen **Note:** You also need to complete the **Preferences** screen in order to use Store Connect.
overrides to preference settings by system and order type	• *Order Broker Preference Overrides*

For more information: See *Setting Up Data for the Routing Engine Module* for a checklist to use when setting up an organization.

How to display this screen: Click the Order Broker Preferences icon ( ) for an organization at the *Organizations and Preferences* screen.

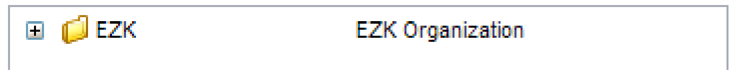
Note:

Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Organization and Preferences* authority can display this screen. See the *Role Wizard* for more information.

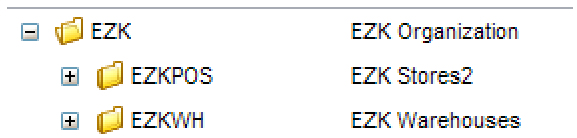
Options at this screen

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>review preferences at a specific level
See Fields at this screen, below, for more information.</td><td>

1. When you first advance to this screen, it displays the preferences at the level of the organization you selected at the *Organizations and Preferences* screen.



2. Click the plus sign next to the *organization* in the left-hand pane to display each *location type* for the organization if they are not already visible.



3. **Location-type-level preferences:** You can display the preferences for a location type by highlighting the location type name in the left-hand pane.
4. Click the plus sign next to a *location type* in the left-hand pane to display each *location* for the type.

5. **Location-level preferences:** You can display the preferences for a location by highlighting the location name in the left-hand pane.

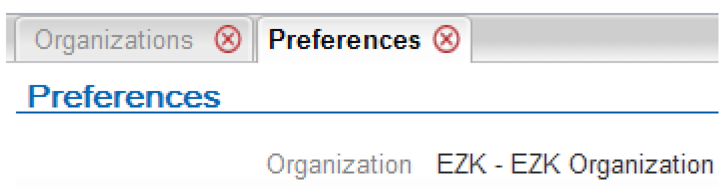
If you click the name of a location type or an organization in the left-hand pane, the tree-structure collapses to that level. For example, if you click the name of an organization while it is expanded to show location types, it collapses back to the organization level.

Note: The hierarchy may not be displayed correctly until you assign a default shipping system to the default admin user. See *Assign the default shipping system to the default user* for more information.

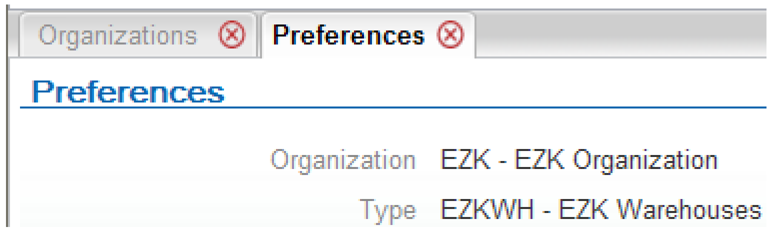
</td></tr>
</table>

Option	Procedure
set preferences at a specific level	1. Use the left-hand pane to advance to the correct organization, location type, or location where the preference setting should apply. Order Broker starts checking preference settings at the location level and works upward; if the setting is set to *Pi* for a location, it next checks the location type level, using the organization level only if both the location-level and location type-level settings are set to *Not Defined*. 2. Set or reset the preferences as needed. See *Fields at this screen*, above, for descriptions of the various preferences. Leave a preference set to *Not Defined* to have Order Broker skip this level and go to the next level in the hierarchy for the preference setting. For example, leave a preference set to *Not Defined* at the location level to have Order Broker check the setting at the location type level. These settings are required at the organization level. 3. Click *Save*.

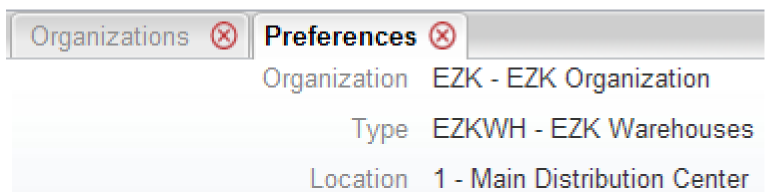
Fields at this screen

Field	Description
Heading Information	The information displayed at the top of the screen varies depending on whether you are working with preferences for a specific location or location type, or for the organization itself.
Organization	When you first advance to this screen, the location hierarchy is collapsed to the level of the organization you selected at the Organizations and Preferences screen. The organization code is separated from the organization description by a hyphen (-).  See *review preferences at a specific level*, above, for more information on how to work with preferences for an organization. **Settings at the organization level:** • The *Use Probability Rules* and *Order Broker Settings Tab* are available at the organization level only. • The remaining preferences are *Use Proximity Locator*, *No Offline Response Action*, and tab settings: *Fulfillment Tab*, *Standard Brokering Tab*, and *Weighted Brokering Tab*. These preferences are available at all levels (organization, location type, and location); however, the organization-level settings apply if you do not set these preferences at the location type level or the location level. **Important:** You should set all preferences at the organization level in order to avoid unpredictable results.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Type</td><td>When you highlight a location type in the left-hand pane, its code and name are displayed at the top of the screen.



Settings at the location type level:
The Use Proximity Locator, No Offline Response Action, and Fulfillment Tab settings at the location type level apply to locations of that type unless they are overridden at the location level. These settings override any settings at the organization level.
If a setting is set to Not Defined at the location type level, the organization-level setting applies.
See review preferences at a specific level, above, for more information on how to work with preferences for a location type.</td></tr>
<tr><td>Location</td><td>When you highlight a location in the left-hand pane, its code and description are displayed at the top of the screen.



Settings at the location level:
The Use Proximity Locator, No Offline Response Action, and Fulfillment Tab settings at the location level apply to the selected location and override any settings at the location type or organization level.
If a setting is set to Not Defined at the location level, the location type-level setting, if any, applies; otherwise, if the setting is set to Not Defined at the location-type level, the organization-level setting applies.
See review preferences at a specific level, above, for more information on how to work with preferences for a location type.</td></tr>
</table>

Field	Description
Navigational Fields	**Note:** These fields are in the left-hand side of the **Preferences** screen, below the heading information. See *review preferences at a specific level*, above, for information on advancing through these fields to display preferences for a specific organization, location type, and location.
Organization	An *organization*.
Location Type	A *location type*.
Location	A *location*. The location code is also displayed.
Preference Fields	
Preference Options	**Available at:** All levels.

Field	Description
Use Proximity Locator	Indicates whether to use proximity locator search logic when searching for a location that could fulfill an order, restricting search results to locations within the specified search area. *Yes* = Use *proximity locator* search logic. If a location is not within the search area specified for a *locate items* or *product availability search* request, do not include the location in the search results. Also, the Routing Engine can use distance as a criterion for the *submit order message*, or when an order is rejected by a fulfilling or sourcing location and needs to be "reshopped," for locations where this setting applies. If you set this field to Yes, you need to specify an address for each location that should be subject to proximity rules. *No* = Include a location in the search results regardless of its distance from the customer's location or the pickup location. Also, the Routing Engine cannot use distance as a criterion for the *submit order message* or when an order is "reshopped." *Not Defined* = Check a higher level setting to determine whether to use proximity locator search logic. This setting is not available at the organization level. Order Broker uses the *Data Hierarchy* to determine whether this preference applies to a particular location, checking for a Yes or No setting at the location level, then at the location type level, and finally at the organization level. **If some locations do not use proximity:** You might use proximity locator search logic for some locations in your enterprise, such as retail stores, and not for others, such as warehouses, in order to route orders to warehouses first. Any locations that are not set up as eligible for proximity searching are returned in search results with a distance of 0 from the requesting location. For example, if you use the Routing Engine and have proximity as your first search criterion, search results are returned in ascending sequence based on distance from the requesting location; as a result, any eligible locations that are not eligible for proximity locator searching are listed first in the response message. **For more information:** See *Proximity Locator Searching* in the overview for a discussion.
Default Distance	The maximum distance, in the selected distance unit of measure, that the Routing Engine should search within when looking for fulfilling locations for pickup or delivery orders. Not used for ship-for-pickup orders, which use the *Sourcing Distance* instead. Defaults to 4000, but you can override it. Required. In situations when *Turn-by-Turn Distance Calculation for Delivery Orders* takes place, the *Maximum Turn-by-Turn Distance* applies instead. See *Turn-by-Turn Distance Calculation for Delivery Orders* for a discussion. **Note:** This setting is available at the organization level only.
Distance unit of measure (unlabeled field to the right of the Default Distance)	Select either miles (default) or kilometers to control the unit of measure for the Default Distance. **Note:** This setting is available at the organization level only.

Field	Description
Use Offline Newer Than:	Indicates whether to use *offline inventory* information in responding to a locate items or product availability request if the inventory information for product locations for a requested item in that system was updated within a given period of time, indicated as HH:MM:SS. For example, set this field to 1:30:00 in order to use off-line inventory information for each related *product location* if the information for any product location for the item in that system was updated in the last hour and a half. When inventory information for product locations in the system was updated within the time frame specified, Order Broker does not send an *inventory inquiry* to an online system. **Note:** • Order Broker sends an *inventory inquiry* to a system for an item only if it already has a record of a *product location* for the item in that system. As a result, if there was not previously a product location for the item in a particular system, but one was created for the item since the last time you imported products and locations from the system, then Order Broker does not send an inventory inquiry to the system and so is not notified of the new product location. • This setting is available at the organization level only.
No Offline Response Action	Indicates how to handle an *online system* in the locate items response or product availability response when Order Broker cannot receive an inventory update from the system. Options are: • *Use offline* = Use the current *offline inventory* • *Exclude from response* = Do not include the product locations in the response to the *locate items* request • *Not Defined* = Check a higher level setting to determine the response action. This setting is not available at the organization level.
Use Probability Rules	Select this flag to use probability rules when performing locate items searches and other processes that search for fulfilling or sourcing locations. This option is available only at the organization level. See *Using Probability Rules* and the *Probability Rule Wizard* for more information. **Note:** • This setting is available at the organization level only. • This setting does not need to be selected for the processing described under *Probability Rules Update and Incremental Quantity Web Service* to take place.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Acknowledge Order Before Brokering</td><td>Select this flag to have the Order Broker acknowledge the submit order request before selecting a fulfilling or sourcing location for an order. This option enables the Order Broker to respond more quickly to submit order requests, especially if you process large, multi-line orders. If this flag is selected, when a system submits a delivery order that does not specify a fulfilling location, or a ship-for-pickup order that does not specify a sourced location:

The Order Broker validates just basic order information, such as address, products, and originating system and location, before acknowledging the order in the submit order response message.
The order lines are initially assigned to the IN PROCESS location, which is a virtual location used temporarily until the Order Broker completes the fulfilling or sourcing location selection process, including all shopping logic such as fulfillment zone evaluation, interactive inventory updates, and probability rules.
The Order Broker creates the IN PROCESS location if it does not already exist. This location is:

assigned to the same system and location type as the default shipping (unfulfillable) location
created with the Pickup Available, Delivery Available, Ship For Pickup Sourcing Available, Ship For Pickup Receiving/Pickup Available, Backorder Available, Ship For Pickup Sourcing Available, Ship For Pickup Receiving/Pickup Available flags all set to No
assigned the name Brokered Order Temporary Location

Note: If you create the IN PROCESS location instead of letting Order Broker create it automatically, you need to make sure that the above-listed flags are all set to No.
The submit order response message always specifies the IN PROCESS location for a delivery order unless the request message specified a fulfilling location, and for a ship-for-pickup order unless the request message specifies a sourced location.
The order is created with a hidden in_process flag that is set to Y until the Order Broker completes location assignment for the order. As long as this flag is set to Y, no lines on the order are eligible to be included in the fulfillment response message.
The originating system needs to submit a status inquiry request after initial order creation to determine the selected fulfilling or sourcing location.
If a line is in any other status besides new_order (for example, if the originating system cancels an order or line) while it is still assigned to the IN PROCESS location, the Order Broker does not assign the order to an actual fulfilling or sourced location.
The Order Broker does not assign a rejected order or line to the IN PROCESS location; instead, it “reshops” the order or line immediately.
If an order or line is still assigned to the IN PROCESS location when the Order Broker receives a status update to cancel it, the Order Broker does not attempt to find a fulfilling or sourcing location for the order or line.

Cleanup process: A cleanup job runs automatically every two hours to check for any orders or lines that were created more than two hours earlier and that are still assigned to the IN PROCESS location, and completes processing for these orders or lines.

This flag is selected by default. Clear this flag to have the Order Broker complete the fulfilling or sourcing location selection process as it</td></tr>
</table>

Field	Description
	receives and creates each order, and specify selected fulfilling or sourcing locations in the submit order response message. **Note:** This setting is available at the organization level only.
Use Zone Fulfillment	Select this flag if the Routing Engine should assign orders only to a primary or secondary location specified for the order's shipping address through the *Fulfillment Zone Wizard*. See *Fulfillment Zones* and the *Fulfillment Zone Wizard* for more information. **Note:** This setting is available at the organization level only.

Field	Description
Exclude Locations with Zero Availability	Controls whether the Routing Engine considers each product location whose *available to promise quantity* is 0 or less when determining which locations could fulfill or source an order. **Why select?** Selecting this option enhances the performance of the Routing Engine module by reducing the number of product locations to evaluate. If this preference is selected, locations whose available to promise quantities are 0 or less are not considered for: • locate items searches • product availability searches • submit order requests • “reshopping” rejected orders or lines This setting applies to delivery, pickup, and ship-for-pickup order requests and searches. **Note:** • Any locations that are flagged as *Backorder Available* are not excluded, regardless of whether the current available to promise quantity is 0 or less. • This preference applies only if there are no *online system*s in your organization. **Can prevent probability rule application:** If this preference is selected, product locations with quantities of 0 or less are excluded before the Routing Engine applies any probability rules. If you might use probability rules to increase the available quantity in locations for Routing Engine evaluation, you should consider whether selecting this preference might produce an undesired result. *Example:* You assign a probability rule that adds the next PO quantity to a product location’s available quantity. When the Exclude Locations with Zero Availability preference is selected, the Routing Engine does not apply this probability rule if a product location’s current available to promise quantity is 0 or less unless the location supports backorders. If this preference is not selected, the Routing Engine evaluates each possible product location, including applying any assigned probability rules, regardless of whether the current available to promise quantity is 0 or less. If this preference is not selected, the Routing Engine does not automatically exclude product locations whose available to promise quantities are 0 or less before performing other evaluation steps, such as probability rules. **Note:** This setting is available at the organization level only.

Field	Description
Use Maximum Order Limits	Controls whether you can restrict the number of delivery orders the Routing Engine can assign per day to a location, or the number of ship-for-pickup orders the Routing Engine can assign per day to a sourcing location. Select this setting to have the Routing Engine check the *Maximum Daily Orders* setting that applies to a location when determining whether an order is eligible to be included in a locate items search response for a delivery or ship-for-pickup order, to be automatically selected as the fulfilling location for a delivery order, or the sourcing location for a ship-for-pickup order. **Note:** This setting is available at the organization level only. **For more information:** See *Using Maximum Daily Order Assignment*.
Use Weighted Brokering Rules	Controls order routing behavior: • Unselected (default): Use the rules set up at the *Standard Brokering Tab*, described below, to select shipping, transfer, or sourcing locations for delivery or ship-for-pickup orders. See *Location Selection* for background. • Selected: After basic filtering of eligible locations, submit product location information, as well as the rules set up at the *Weighted Brokering Tab*, described below, to the Science Engine for selection of shipping, transfer, or sourcing locations for delivery or ship-for-pickup orders. See *LocateItems Sequence and Splitting Examples (Standard Brokering)* for background. **Note:** This setting is available at the organization level only.
Use Attribute Rules	Controls whether to route orders based on custom attribute definitions set up for locations, or for locations and products. See *Using Attribute Rules for Delivery and Pickup Orders* and *Using Attribute Rules for Ship-for-Pickup Orders* for more information. Also controls whether to restrict eligible locations based on whether they support gift wrap.
Update Offline Inventory	Controls whether to update product location records in the database based on inventory information received from integrated online systems during the location shopping process. You might omit the database update step during the location shopping process in order to streamline performance. Possible settings: • Unselected (default): The Routing Engine uses the current inventory information received from an online system in initial or reshopping order assignment, locate items responses, and product availability responses, but does not update the product locations for the online system with the current information received. • Selected: The Routing Engine uses the current inventory information received from the online system, and also updates the product locations with the current information. Applies to online systems only. **Note:** This setting is available at the organization level only.

Field	Description
Shop Order When Proximity Unknown	Controls searching for locations for a Submit Order request. When the *Use Proximity Locator* flag is selected and this flag is: • Selected: The Routing Engine shops an order and uses proximity as a shopping criterion: • Using the ship-to address, if possible; otherwise, • Using the address of the originating location, if possible; otherwise, • Using a distance of 0 as the proximity. • Unselected: The Routing Engine returns an error indicating that the customer address was not found if the ship-to address cannot be identified. Note that all other routing engine rules still apply, including zone assignment, other brokering preference settings, and any probability rules.
Restrict Reassignment of Canceled Line	Select this flag to have the Order Status Update response return an error if the request message indicated to change the status of an order or line that is canceled. Use this setting to prevent a canceled order or line from being "reshopped." If the Order Status Update response returns an error because the order or line is canceled, the *History tab* of the **Order** screen displays a message with Transaction Notes such as *Picked Status Update Restricted*, where *Picked* is the status specified in the Order Status Update request message. Leave this flag unselected to enable the Order Status Update request message to reset the status of a canceled line. See the Operations Guide for more information on the Order Status Update request and response. If this flag is selected, you can use the Status Restricted Report to review order lines whose status update was restricted through the Order Status Update request message. **Note:** Regardless of the setting of this flag, you can still update the status of a canceled order through the *Order* screen if you do not have splitting orders enabled, or through the *Edit Order Item* window if you do have splitting orders enabled, based on the setting of the *Allow Split Order* flag.
Order Broker Settings Tab	These settings indicate the basic rules that the Routing Engine should use when determining whether locations are eligible to: • Ship a delivery order to the customer • Transfer a ship-for-pickup order to the location where the customer will pick up the order • Include in the LocateItems response or the Product Availability response when a system is searching for a location that can fulfill or source an order • Assign an order or order line when it is rejected by the currently assigned fulfilling or sourcing location Also, these rules specify whether a location specified in the SubmitOrder request is eligible for assignment of orders of each type. **Available at:** Organization level only.

Field	Description
Group Shipment Locations	Select this flag if external systems that send *locate items* requests just want to verify that the item(s) on the order is/are available for shipment or transfer, and do not need a listing of individual locations that might be able to ship an order to the customer. **Background:** The Group Shipment Locations flag controls whether the *locate items* response includes the virtual location when the *locate items* request specifies a `fulfillment_type` of *DELIVERY* or *SHIPFORPICKUP*. The virtual location in the response message indicates that the requested item(s) can be shipped (or transferred) from a location, but does not include specifics on which locations stock the item(s), on-hand quantities, open purchase orders, etc. If the item is not available for shipment (or transfer) in any eligible location, the *locate items* response message indicates that the product is not stocked. The virtual location is not an actual location that you need to create in Order Broker. The Group Shipment Locations flag does not affect the *locate items* response message if the customer would like to pick up the item from a designated location that already has the inventory (the `fulfillment_type` is *PICKUP*). Also, the flag does not affect any other messages used in the Routing Engine integration, such as the *submit order message*. Possible settings: • *Selected* = When the *locate items* request message has a `fulfillment_type` of *DELIVERY* or *SHIPFORPICKUP*, and the requested item(s) is/are available for shipment, transfer, or sourcing, return the *virtual location* in the *locate items* response message. • *Unselected* = Do not return the virtual location in the *locate items* response message; always list the locations where the item(s) is/are available for shipment, transfer, or sourcing. **Note:** This flag affects the logic of the *locate items* request and response, but does not affect any other messages.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Allow Split Line</td><td>If this field is selected, the Routing Engine (standard brokering) or Science Engine (weighted brokering):

initially attempts to fulfill a line on a delivery order, or source a line on a ship-for-pickup order, by assigning partial quantities of the requested item to multiple fulfilling locations if a single location does not have the entire requested quantity available, or is not flagged as Backorder Available:
can initially assign the requested quantity of an order line on a delivery order across multiple fulfilling locations, and an order line on a ship-for-pickup order across multiple sourcing locations
reassigns rejected lines on delivery or ship-for-pickup orders across multiple fulfilling or sourcing locations if there is no single eligible location that can fulfill or source the entire requested quantity
also, for the LocateItems request (standard brokering only), if the Group Shipment Locations field is:

Unselected, returns a listing of locations that can partially fulfill the requested quantity of an item in the locate items response if the request specified a <code>fulfillment_type</code> of DELIVERYor SHIPFORPICKUP, and there is no eligible location that could fulfill or source the entire requested quantity; see the Maximum No. Responses field, below for more information
Selected, indicates that the item is available in the virtual location if the request specified a <code>fulfillment_type</code> of DELIVERYor SHIPFORPICKUP, and the order line could be fulfilled by assigning the item to multiple fulfilling or sourcing locations

Note: This setting is available only if the Allow Split Order field is selected.

If this field is unselected, the Routing Engine does not initially attempt to fulfill a line on a delivery order, or source a line on a ship-for-pickup order, when there is no eligible location that could fulfill or source the entire quantity, or that is flagged as Backorder Available. When weighted brokering is in use, the Routing Engine does not submit the request to the Science Engine.

Splitting a line through a partial quantity update: Regardless of the setting of this field, if the Allow Partial Updates field is selected, the Routing Engine or Science Engine reassigns the quantity of a delivery order that is rejected by the fulfilling location, or of a ship-for-pickup order that is rejected by the sourcing location.

Note: This setting applies to order creation only when the fulfilling or sourcing location is not specified in the submit order request message.

For more information: See Selecting a Location for a Delivery Order or Selecting a Sourcing Location for a Ship-for-Pickup Order for a discussion.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Allow Split Order</td><td>If this field is selected, the Routing Engine or Science Engine:

attempts to fulfill a delivery order by assigning individual order lines to different locations if there is no one location eligible to fulfill all the order lines, or
attempts to source a ship-for-pickup order by assigning individual order lines to different sourcing locations if there is no one location eligible to source all the order lines
attempts to reassign rejected individual lines or units on delivery or ship-for-pickup orders until the Search Retries total is reached for the entire order. For example, if the Search Retries total is set to 3, the Routing Engine might reassign 3 rejected order lines or units before it assigns the next rejected line or unit to the Default Unfulfillable Location

Also, the Routing Engine:

requires that the status update request message specify the status of each assigned order line (rather than the order-level status). Note: This applies to all order types, not just delivery or ship-for-pickup orders
supports partial fulfillment of orders
uses additional order-level statuses (Open or Complete) for orders if not all order lines are in the same status
also, for the LocateItems request (standard brokering only), if the Group Shipment Locations field is:
Unselected, returns a listing of locations for each requested item in the locate items response if the request specified a <code>fulfillment_type</code> of DELIVERY, or SHIPFORPICKUP and there is no eligible location that could fulfill or source the requested quantity of all specified items
Selected, indicates that the items are available in the virtual location if the request specified a <code>fulfillment_type</code> of DELIVERYor SHIPFORPICKUP, and the order could be fulfilled or sourced by assigning the lines to multiple fulfilling or sourcing locations

Also, the Preferences screen:

enables you to select the Allow Split Line setting
enables you to select the Allow Partial Updates setting
displays the Auto Cancel Reason and other fields related to enabling Auto-Cancel Unclaimed Orders

RICS integration: If this preference is selected, the Create Fulfillment Order message to RICS has the partial delivery indicator (<code><partial_delivery_ind></code> tag set to Y; otherwise, it is set to N. See Order Fulfillment through RICS Integration for more information.

If this field is unselected, the Routing Engine or Science Engine does not:

attempt to fulfill a delivery order if there is not at least one eligible location that can fulfill the entire order
attempt to source a ship-for-pickup order if there is not at least one eligible location that can source the entire order
support partial fulfillment of an order

Also, the Routing Engine does not:

accept submit order requests that specify multiple fulfilling or sourcing locations for an order
</td></tr>
</table>

Field	Description
	• accept a status update request message that does not specify order-level status; all status updates apply to the order and all order lines • use order-level statuses representing mixed line statuses, since all of the line statuses will be consistent • enable you to select the *Allow Split Line* setting or the *Allow Partial Updates* setting **Note:** This preference is selected by default when you create a new organization. **For more information:** See *Selecting a Location for a Delivery Order*, including *LocateItems Sequence and Splitting Examples (Standard Brokering)*.

Field	Description
Allow Partial Updates	Indicates whether to support status updates for individual units on an order line, rather than always updating the status of the entire order line. *Example:* When a customer arrives at a store for a pickup order, he buys 2 units of an order line and does not want the other unit. The store location sends a status update to change 2 of the units to fulfilled, and sends another status update to change the remaining unit to canceled. If this field is: • selected, each *status update* message needs to specify the item quantity of the order line to update to the new status. When the specified item quantity is lower than the current line quantity, the Routing Engine creates a new order line for the specified quantity and decreases the quantity of the current order line. If the status update indicates to reject the quantity for a delivery or ship-for-pickup order, the Routing Engine attempts to reassign the order line quantity based on the rules described under *Selecting a Location for a Delivery Order*. • unselected, the setting of the *Use Requesting System Line Number in Status Update* for the originating system controls whether a *status update* from the originating location needs to specify the requesting system's line number, or the line number assigned by Order Broker. See the discussion of the *Use Requesting System Line Number in Status Update* flag for more information. **Note:** • This field is enabled only if the *Allow Split Order* field is selected. • When a partial quantity of a line on a delivery or ship-for-store order is rejected, the Routing Engine splits the line and attempts reassignment regardless of the setting of the *Allow Split Line* field. • If this field is selected, the unit quantity is also required at the *Edit Order Item* window. • The Routing Engine tracks the number of *Search Retries* for a delivery or ship-for-pickup order based on the total number of rejections, including each rejection of a single unit. See *When the Routing Engine Cannot Fulfill an Order*, below, for a discussion. • When individual units on a line on a delivery or ship-for-pickup order are rejected separately, the Routing Engine assigns each rejected unit to a separate fulfilling or sourcing location. • The Store Connect module does not support partial status updates. • Do not select this preference if an integrating system, such as Order Management System, does not support partial quantity updates of order lines. **For more information:** See *Updating Order Status at the Line or Unit Level* for a discussion.

Field	Description
Maximum No. Responses	Indicates the maximum number of locations to return in the *locate items* response message. You can enter any number from 1 to 9999. Required. **If splitting lines:** The locate items response does not include more than this number of locations, even when the *Allow Split Line* field is selected and it would require more than this number of locations to fulfill or source the entire requested quantity on a delivery or ship-for-pickup order. For example, the Maximum No. Responses is set to 3, the requested quantity of an item is 10, and there are 5 eligible locations, each with a quantity of 2. The locate items response includes just the first 3 locations; however, if you submit an order for the quantity of 5, the Routing Engine assigns the full quantity across the 5 locations. • If the *Allow Split Order* field is selected, the *Allow Split Line* field is unselected, the requested quantity for a delivery or ship-for-pickup order exceeds the quantity available in all eligible fulfilling or sourcing locations, and one of the eligible locations is flagged as *Backorder Available*, the *locate items* response message lists just the location(s) flagged as *Backorder Available*. This response indicates that the only way to assign the entire order is to assign the entire requested quantity to a location flagged as *Backorder Available*, even if it does not have the requested quantity on-hand. • This limit does not apply to the number of pickup locations returned in the ProductAvailability response message. See *Using Product Availability Search for a Pickup or Delivery Order* for background.
Default Unfulfillable Location	The default location for the Routing Engine to use when no actual locations in the organization can fulfill or source a delivery, or ship-for-pickup order or line. When a system inquires on the current status of an order and the response indicates that the order or line is assigned to this location, this indicates that the order or line is unfulfillable. **For more information:** See *Setting Up Data for the Routing Engine Module* for setup recommendations. **Important:** The default unfulfillable location does not represent an actual location where items are stocked; however, you *do* need to create it as a valid location in the default system for your organization.
Default Carrier	The default carrier to assign to delivery or ship-for-pickup orders, if no `ship_via` is specified in the submit order message. Required. **Pickup orders?** Pickup orders are assigned to the default *PICKUP* carrier, which is created automatically. **For more information:** See the *Carriers* screen in Modern View for background. **Note:** You cannot delete the default carrier or the default PICKUP carrier.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Do Not Split Order For Carrier</td><td>Optionally, select a carrier to indicate that the Routing Engine should:
Not split new delivery orders that have this carrier assigned. If the entire order cannot be assigned to a single location, it is unfulfillable.
If the fulfillment type for the LocateItems or ProductAvailability request is delivery and the request specifies this carrier, indicate that the requested product(s) is/are available only if they could be fulfilled without splitting.
Not reassign a rejected order line on a delivery order by splitting it across multiple locations if the order has this carrier assigned.
Defaults to Not Defined. All carriers are available for selection, with the exception of the default PICKUP carrier.
Note:
This preference applies to Routing Engine logic only when the Allow Split Order preference is selected.
This setting does not prevent you from splitting an order or line manually through the Edit Order Item window.</td></tr>
<tr><td>Turn-by-Turn Distance Evaluation for Delivery Orders</td><td>These fields control whether to use turn-by-turn distance evaluation, rather than straight-line distance, for delivery orders using a specified carrier.
Available when? Turn-by-turn distance evaluation is available only when you use the Oracle Maps Cloud Service API and only if a valid Turn-by-Turn Distance URL is specified at the Tenant-Admin screen. See Turn-by-Turn Distance Calculation for Delivery Orders for a discussion.
Note:
These settings are available at the organization level only.</td></tr>
<tr><td>Carrier for Turn-by-Turn Distance Evaluation</td><td>The carrier that requires use of turn-by-turn distance evaluation for a delivery order, if turn-by-turn distance calculation is enabled.
For example, when you use a local delivery service, you need to make sure to consider the actual driving distance, rather than the point-to-point distance, when determining the locations that are actually closer to the customer’s address.
Defaults to Not Defined. The PICKUP and SHIP2STORE carriers are not available for selection.</td></tr>
</table>

Field	Description
Maximum Turn-by-Turn Distance	The maximum distance from the customer’s address to use when evaluating possible locations for a delivery order based on turn-by-turn distance, in order to exclude locations that are too far away, and enhance performance. *Example:* When you use a local delivery service, you want to evaluate the actual driving distance for locations only within a 10-mile radius from the customer’s address, since it takes an increasingly longer time to calculate the actual driving distance for locations that are farther away. *Overrides:* The product availability request can specify a different distance to override this default; however, this default is always used for a locate items request, submit order request, or when selecting a new fulfilling location when an order or line is rejected. *Calculation method:* Initial evaluation of fulfillment locations takes place using straight-line distance calculation. For example, this default is set to 15 miles, and the location’s straight-line distance from the customer’s address is 14.5 miles. The location is included in the turn-by-turn request to Oracle Maps Cloud Service. However, if turn-by-turn distance returned by Oracle Maps Cloud Service is 15.2 miles, the location is still excluded from the list of eligible to fulfill the delivery order. Defaults to 100. You can enter a whole number from 1 to 100.
Turn-by-Turn Unit of Measure (unlabeled field)	The unit of measure to use when calculating the maximum turn-by-turn distance. You can select kilometers or miles. Defaults to miles.
Fulfillment Tab	The Routing Engine uses these settings to determine the types of orders a location can fulfill and how to rank a location separately from other standard or weighted brokering criteria, and how many attempts to make to place an order for fulfillment. When weighted brokering is used, these settings control the product locations to submit to the Science Engine for location selection based on weighted percentages and other factors. This tab also includes settings that control the automatic cancellation of unclaimed pickup and ship-for-pickup orders. **Available at:** The Search Retries, Sourcing Distance, Auto Cancel Days of Unclaimed Pickup Orders, Auto Cancel Days of Unclaimed Ship For Pickup Orders, and Auto Cancel Reason settings are available at the organization level only, while the other settings are available at all levels.

Field	Description
Pickup Available	Indicates to the Routing Engine whether a location is eligible to fulfill an order whose fulfillment type is *PICKUP*. This setting controls whether to: • include the location in the response when the Routing Engine receives the *locate items* request for the *PICKUP* fulfillment type • consider the location an eligible pickup location when the Routing Engine receives the *product availability search* request. • accept the order when the Routing Engine receives a *submit order message* for a pickup order. Set this field to *Yes* to have a location, type, or organization eligible to fulfill a pickup order, or set it to *No* if you do not want the location, type, or organization eligible for pickup orders. Order Broker uses the *Data Hierarchy* to determine whether this preference applies to a particular location, checking for a *Yes* or *No* setting at the location level, then at the location type level, and finally at the organization level. See *Pickup Order* for a discussion.
Delivery Available	Indicates to the Routing Engine whether a location is eligible to fulfill an order whose fulfillment type is *DELIVERY*. This setting controls whether to: • include the location when the Routing Engine receives the *locate items* request for the delivery fulfillment type. The location is listed in the *locate items* response if the *Group Shipment Locations* flag is set to *No*; if the *Group Shipment Locations* flag is set to *Yes*, then the response lists just the *virtual location*, but considers the location when determining if the requested item(s) are available for shipment. • consider the location eligible to fulfill an order when the Routing Engine receives the *product availability search* request, or filter eligible locations to submit to the Science Engine. • consider the location eligible for order selection when the Routing Engine receives a SubmitOrder request message with the delivery fulfillment type if the Routing Engine needs to select the fulfilling location, or filter eligible locations to submit to the Science Engine. • consider the location eligible for selection as a fulfilling location when an order is rejected and the Routing Engine needs to “reshop” the order. • create the order when the Routing Engine receives a SubmitOrder request message with the delivery fulfillment type if the fulfilling location is specified in the request message. Set this field to *Yes* to have a location, type, or organization eligible to fulfill a delivery order, or set to *No* if you do not want the location, type, or organization selected for delivery orders. Order Broker uses the *Data Hierarchy* to determine whether this preference applies to a particular location, checking for a Yes or No setting at the location level, then at the location type level, and finally at the organization level. See *Delivery Order* for a discussion.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Ship For Pickup Sourcing Available</td><td>Indicates to the Routing Engine whether a location is eligible to transfer the inventory for an order to the pickup location for a ship-for-pickup order (a fulfillment type of SHIPFORPICKUP). This setting controls whether to:

include the location when the Routing Engine receives the locate items request for the ship-for-pickup fulfillment type. The location is listed in the locate items response if the Group Shipment Locations flag is set to No; if the Group Shipment Locations flag is set to Yes, then the response lists just the virtual location, but considers the location when determining if the requested item(s) are available for transfer.
consider the location eligible to supply inventory for ship-for-pickup order when the Routing Engine receives the product availability search request, or filter eligible locations to submit to the Science Engine.
consider the location eligible for selection as a sourcing location when the Routing Engine receives a SubmitOrder request message with the ship-for-pickup fulfillment type, if the Routing Engine needs to select the fulfilling location, or filter eligible locations to submit to the Science Engine.
create the order when the Routing Engine receives a SubmitOrder request message with the ship-for- pickup fulfillment type if the sourced location is specified in the request message.
consider the location eligible for selection as a sourcing location when an order is rejected and the Routing Engine needs to “reshop” the order.

Set this field to Yes to have a location, type, or organization eligible to source a ship-for-pickup order, or set to No if you do not want the location, type, or organization selected to source ship-for-pickup orders.

Order Broker uses the Data Hierarchy to determine whether this preference applies to a particular location, checking for a Yes or No setting at the location level, then at the location type level, and finally at the organization level.

This field is displayed only if the organization supports ship-for-pickup orders. See Enable Ship-For-Pickup? for background.

See Ship For Pickup Order for a discussion on ship-for-pickup orders.</td></tr>
</table>

Field	Description
Ship For Pickup Receiving/Pickup Available	Indicates to the Routing Engine whether a location is eligible to have the customer pick up an order whose fulfillment type is *SHIPFORPICKUP*. This setting controls whether to: • consider the location an eligible ship-for-pickup location when the Routing Engine receives the *product availability search* request. • accept the order when the Routing Engine receives a *submit order message* for a ship-for-pickup order. Set this field to *Yes* to have a location, type, or organization eligible to have a customer pick up a ship-for-pickup order, or set it to *No* if you do not want the location, type, or organization eligible for pickup of ship-for-pickup orders. Order Broker uses the *Data Hierarchy* to determine whether this preference applies to a particular location, checking for a *Yes* or *No* setting at the location level, then at the location type level, and finally at the organization level. This field is displayed only if the organization supports ship-for-pickup orders. See *Enable Ship-For-Pickup?* for background. See *Ship For Pickup Order* for a discussion.

Field	Description

Backorder Available	Indicates whether a location can be assigned a *delivery order*or for sourcing of a *ship-for-pickup order*, even if it does not currently have sufficient inventory on-hand.
	Splitting an order line: If the Allow Split Line preference is set to *Yes* and the Routing Engine needs to split a line across multiple locations in order to fulfill it, it uses a location flagged as Backorder Available as a catchall, even if the location does not have sufficient inventory on-hand to fulfill the entire quantity.
	Example: A customer places an order for 10 units of an item. Location A has 5 available, location B has 3 available, and location C has 2 available.
	• If none of the locations are flagged as Backorder Available, the Routing Engine assigns:
	  – 5 to location A
	  – 3 to location B
	  – 2 to location C
	• However, if location B is flagged as Backorder Available, the Routing Engine assigns 5 to location A and 5 to location B. It does not continue to assign a quantity to location C, since location B acts as the catchall.
	Set this field to *Yes* to have a location, type, or organization eligible to fulfill a delivery order, or to source a ship-for-pickup order, even if it does not currently have the requested quantity of each item on-hand, or set to *No* if you do not want the location, type, or organization selected unless it currently has the full quantity of each item on-hand.
	Order Broker uses the *Data Hierarchy* to determine whether this preference applies to a particular location, checking for a Yes or No setting at the location level, then at the location type level, and finally at the organization level.
	Note:
	• If Standard Brokering is in use, the Routing Engine still uses the Standard Brokering settings to assign partial locations for a split line until it assigns a partial quantity to a location flagged as Backorder Available, and does not omit preceding eligible locations that would otherwise be selected first. In the example above, since location A is first in the hierarchy based on your Order Broker Settings, it is still assigned to fulfill the first 5 units, even though location B is flagged as Backorder Available.
	• When you submit a locate items request with a fulfillment type of *DELIVERY* or *SHIPFORPICKUP*, the response message always indicates that the items are available if an eligible location where they are stocked has the Backorder Available flag selected.
	• Do not set this field to *Yes* for the *Default Unfulfillable Location*.

Field	Description
Location Priority	Indicates to the Routing Engine the preference to give a location when selecting a location to ship a *delivery order*, or source a *ship-for-pickup order* when the Routing Engine uses the Location Priority criterion. This setting is considered only when only for Standard Brokering. See the description of the *Location Priority* below under *Standard Brokering Tab* for more information. The Science Engine does not use this setting. You can set location priority at the location, location type, and organization level. The Routing Engine checks the location setting first. If there is no Location Priority set at the location, the Routing Engine checks the location type setting; if there is no Location Priority set at the location type, the Routing Engine checks the organization. Order Broker uses the *Data Hierarchy* to determine whether this preference applies to a particular location, checking for a setting from 1 to 9 at the location level, then at the location type level, and finally at the organization level.
Search Retries	Indicates how many times to reassign a delivery or ship-for-pickup order, or lines or units on an order, to other fulfilling or sourcing locations after rejection. If a location assigned to fulfill a delivery or ship-for-pickup order or line rejects it, the Routing Engine selects the next eligible location in its search criteria to fulfill or source the order, line, or unit, as long as the Search Retries level has not been exceeded for the entire order. If an order or line is rejected by that number of locations, or if there are no additional eligible locations, the Routing Engine assigns the order or line to the *Default Unfulfillable Location*, indicating that the order or line cannot be fulfilled through the Routing Engine. For example, when the Search Retries limit is 2, and the order has been rejected and reassigned 2 times, the Routing Engine assigns the order to the default unfulfillable location if it is rejected a third time. See *When the Routing Engine Cannot Fulfill an Order*, above, for a discussion. Enter a number from 0 to 99. Available at the organization level only.

Field	Description
	When the Routing Engine Cannot Fulfill an Order The Routing Engine uses the Search Retries setting for the organization to determine how many times it can reassign an order, or its lines or units, to other locations for shipment, transfer, or sourcing. If a location assigned to fulfill or source an order or line rejects it, the Routing Engine selects the next eligible location based on its search criteria to fulfill or source the order, line, or unit, or resubmits the data to the Science Engine, as long as the Search Retries level has not been reached for that order. **Search retries total:** The Routing Engine tracks the total number of rejections for an order, whether the rejection is based on a single unit, a single line, or the entire order. After the search retries limit is reached, the Routing Engine assigns the order to the *Default Unfulfillable Location*, indicating that the order cannot be fulfilled through the Routing Engine. This can occur when: • the order is rejected by that number of locations (non-split order), or • individual order lines are rejected by that number of locations (split order), or • individual units are rejected (if *Allow Partial Updates* is selected), or • there are no additional locations that stock the requested item(s). *Example:* The Search Retries is set to 2 for an organization. The Routing Engine assigns an order to location 12, which rejects the order because the requested item has since sold out. The Routing Engine then assigns the order to location 43, which also rejects the order. At this point, the Routing Engine assigns the order to the default unfulfillable location. The next time the placed (originating) location checks the status of the order, the assignment to the default unfulfillable location indicates that the Routing Engine was unable to find a location to fulfill the order. **Splitting orders?** If the Allow Split Order preference is set to *Yes* and the Routing Engine assigns lines on the order independently, it compares the number of retries across the entire order with the Search Retries; it does not track the retries for each line individually. For example, the Search Retries is set to 2 and the order includes 5 lines, each assigned to a different location. If 2 lines are rejected and the Routing Engine receives a rejection for a third line, the line is assigned to the default unfulfillable location. **Allow Partial Updates?** If the *Allow Partial Updates* preference is selected, the assigned location can reject each unit individually. In this situation, each rejection increments the search retries total. *Example:* The Search Retries is set to 2. A location rejects 1 unit on the first line; rejects a second unit on the first line; and then rejects 1 unit on the second line. Since the Search Retries was reached by the 2 rejections on the first line, the unit on the second line is assigned to the *Default Unfulfillable Location*.

Field	Description
Maximum Daily Orders	Indicates the maximum number of delivery or ship-for-pickup orders that the Routing Engine can automatically assign to a location per day, or consider eligible when filtering locations to send to the Science Engine. Maximum daily order limits apply, and this field is enterable only if the *Use Maximum Order Limits* flag is selected. See *Using Maximum Daily Order Assignment* for an overview. Possible settings are: • *maximum number:* Unselect the Not Defined flag to enter a maximum number of orders to restrict automatic assignment of delivery orders for a location to this number. Your entry can be up to 10 positions. **Note:** If the Maximum Daily Orders is already set for a location or location type and you delete the current setting, the screen selects the Not Defined flag automatically. Clear the Not Defined flag to enter a different number. • *0:* There is no limit to the number of delivery or ship-for-pickup orders that the Routing Engine or Science Engine can assign to the location. • *Not Defined:* Select this setting to clear the maximum number, if any, for a location or location type, and to have the Routing Engine check the next level for a maximum daily order setting. If Not Defined is selected for a location, the setting from the location type applies; and if Not Defined is selected for both the location and the location type, the setting for the organization applies. **Organization-level setting:** An entry of a maximum number or 0 is required at the organization level if the *Use Maximum Order Limits* flag is selected. Instead of using the backspace key to change an organization-level setting, highlight the number currently entered in this field and enter the new number.
Sourcing Distance	The maximum distance, in the selected distance unit of measure, that the Routing Engine should search within when looking for sourcing locations for ship-for-pickup orders, or when filtering locations for these orders to send to the Science Engine. Not used for delivery or pickup orders; which use the *Default Distance* instead. Defaults to 4000, but you can override it. Required. This setting is available at the organization level only, and is displayed only if the organization supports ship-for-pickup orders. See *Enable Ship-For-Pickup?* for background. See *Ship For Pickup Order* for a discussion.
Distance unit of measure (unlabeled field to the right of the Sourcing Distance)	Select either miles (default) or kilometers to control the unit of measure for the Sourcing Distance. **Note:** This setting is available at the organization level only, and is displayed only if the organization supports ship-for-pickup orders.
	The following fields are related to the automatic cancellation of unclaimed pickup or ship-for-pickup orders through the Auto Cancel Unclaimed Pickup Orders job. See *Auto-Cancel Unclaimed Orders* for a discussion. These fields are available only if *Allow Split Order* is selected, and are available at the organization level only.

Field	Description
Auto Cancel Days of Unclaimed Pickup Orders	The number of days to retain a pickup order, after the customer is notified that the order is ready for pickup, before the order is eligible for automatic cancellation through the Auto Cancel Unclaimed Pickup Orders job. See Auto-Cancel Unclaimed Orders for a discussion. Defaults to *Not Used*. • This setting is available at the organization level only, and only if *Allow Split Order* is selected. • The Pickup By Date is assigned even if the order is currently flagged as Under Review. In this case, the customer is not notified that the order is ready for pickup until the Under Review flag is removed. **Note:** If this preference is set to *Not Used*, then the option to change the pickup date is not available in Store Connect, regardless of whether an *Auto Cancel Days of Unclaimed Ship For Pickup Orders* is specified.
Auto Cancel Days of Unclaimed Ship For Pickup Orders	The number of days to retain a ship-for-pickup order, after the customer is notified that the order is ready for pickup, before it is eligible for automatic cancellation through the Auto Cancel Unclaimed Pickup Orders job. See Auto-Cancel Unclaimed Orders for a discussion. Defaults to *Not Used*. • This setting is available at the organization level only, and only if the organization supports ship-for-pickup orders. See Enable Ship-For-Pickup? for background. Also, this field is available only if *Allow Split Order* is selected. • The *Pickup By Date* is assigned even if the order is currently flagged as Under Review. In this case, the customer is not notified that the order is ready for pickup until the Under Review flag is removed. • If the number of days is specified, the store associate user can select a new order pickup date from the Ready to Pick Up screen, Pick Up Order screen, or the View Order screen in Store Connect.
Auto Cancel Reason	Select the cancellation reason code to use when an unclaimed pickup or ship-for-pickup order is automatically canceled through the Auto Cancel Unclaimed Pickup Orders job. See Auto-Cancel Unclaimed Orders for a discussion. Defaults to *Not Used*. The cancellation reason code specified here cannot be deleted or deactivated. See the *Reason Codes* screen in Modern View for background. There is no restriction against using this code in other situations, such as in Store Connect. **Note:** This setting is available at the organization level only, and only if *Allow Split Order* is selected.

Field	Description
Standard Brokering Tab **Available at:** The organization level.	**Important:** The settings at this tab apply to delivery or ship-for-pickup orders only if *Use Weighted Brokering Rules* is unselected. If *Use Weighted Brokering Rules* is unselected, these fields control the criteria that the Routing Engine uses to sort locations when it selects a location to fulfill a delivery order or line, or select a sourcing location for a ship-for-pickup order or line, when it receives the SubmitOrder request message or Product Availability request message, or when it lists the locations in the locate items response for any fulfillment type. It also uses these criteria when a location assigned to fulfill the delivery order or to source the ship-for-pickup order or line rejects it, and the Routing Engine needs to look for a new fulfilling location. **Ranking criteria:** To have the Routing Engine use a particular criterion first, rank it with a *1*, and continue assigning *2*, *3*, *4*, and *5* to other criteria that the Routing Engine should consider; however, the Last Order Assigned and Sales Velocity Rank criteria are optional. For example, to have the Routing Engine look first at On Hand Count, rank it with a *1*; to have the Routing Engine next look at Location Priority in a situation when two locations have the same on-hand count, rank Location Priority with a *2*; and so on. **When does the Routing Engine check the second, third, and optional fourth or fifth criterion?** The Routing Engine checks the next criterion in the hierarchy only when there is more than one location with the same result for the previous criterion (a "tie-breaker"). *Example:* If you rank Location Priority with a *1* and there is more than one eligible location with the same Location Priority, then the Routing Engine checks the next criterion in the hierarchy. On the other hand, if you rank Proximity with a *1* and all eligible locations use proximity locator logic, it is less likely that more than one location will be the exact same distance from the requesting location, so as a result it is less likely that the Routing Engine will need to check the next criterion. **Optional criteria:** The Last Order Assigned and Sales Velocity Rank criteria are optional. **Which locations are eligible for consideration?** The criteria apply only to locations that: • stock the item • have a sufficient quantity available, or have the Backorder Available flag selected • are flagged Delivery Available for a delivery order, or Ship For Pickup Sourcing Available for a ship-for-pickup order • are not excluded due to probability rules • are not excluded based on zone shipping • are not excluded based on exceeding the *Maximum Daily Orders* **Searching for pickup locations:** When the Routing Engine receives a web service request searching for locations that could fulfill a pickup order:

Field	Description
	• If *Use Weighted Brokering Rules* is selected: Both the LocateItems response and the Product Availability response list the locations in order of proximity. • If *Use Weighted Brokering Rules* is unselected: The LocateItems response uses Standard Brokering rules, while the Product Availability response lists the locations in order of proximity. **Criterion evaluation (ascending or descending):** The second flag for each of the criterion indicates how to apply the criterion. See the description of each criterion, below, for a discussion. **For more information:** See *Selecting a Location for a Delivery Order* and *Selecting the Location for a Pickup Order (LocateItems)* for background. **Overrides?** You can set up overrides to these criteria, based on the originating system and order type. In the case of delivery and ship-for-pickup order types, the express carrier flag is also considered. The override settings all default to inheriting the settings from the **Preferences** screen, but if there is an override set up that matches the information in a locate items or order request, the override criteria apply. The overrides also apply when the Routing Engine "reshops" a rejected delivery or ship-for-pickup order. See *Order Broker Preference Overrides* for more information.
Proximity	If the Routing Engine uses the proximity criterion: *Closest* = select the eligible location closest to the requesting location's, customer's, or pickup location's address. You might choose this setting to save on shipping costs for delivery orders or shorten the transfer time for ship-for-pickup orders. *Farthest* = select the eligible location farthest from the requesting location's, customer's, or pickup location's address To use proximity as an Order Broker criterion, you need to be using the *proximity locator* and have data in the *proximity location table*, or be using the *Oracle Maps Cloud Service*. **If some locations do not use proximity:** You might use proximity locator search logic for some locations in your enterprise, such as retail stores, and not for others, such as warehouses. Any locations that are not set up as eligible or proximity searching are returned in search results with a distance of 0 from the requesting location. For example, if you use the Routing Engine and have proximity as your first search criterion, search results are returned in ascending sequence based on distance from the requesting location; as a result, any eligible locations that are not eligible for proximity locator searching are listed first in the response message.
On Hand Count	If the Routing Engine uses the on-hand count criterion: *Low to High* = select the eligible location whose available quantity is lowest. *High to Low* = select the eligible location whose available quantity is highest. You might use this setting to avoid depleting the inventory in any one location. If there are multiple products requested, use the total available quantity in each location for evaluation. The determination of the available quantity is subject to probability rules and *reserved quantity* calculation.

Field	Description
Location Priority	If the Routing Engine uses the location priority criterion for delivery or ship-for-pickup orders: *Low to High* = select the eligible location with the lowest-number location priority to ship, transfer, or source the order *High to Low* = select the eligible location whose location priority is the highest number
Last Order Assigned	If the Routing Engine uses the last order assignment criterion: *Constant* = select the eligible location whose last order assignment date and time (for any item or items) was the most recent. However, you would not ordinarily use this criterion with a setting of *Constant*, as this would cause the Routing Engine to persistently select the same location to fulfill orders until such point when that location is unable to fulfill an order; at that time, the Routing Engine would persistently pick another location to fulfill orders. *Variable* = select the eligible location whose last order assignment date and time (for any item or items) was the earliest. You might choose this setting to create an even distribution of orders or lines among eligible locations. The Routing Engine checks the create_timestamp field in the xom_order table when evaluating locations for this criterion. It updates this field when it assigns an order or line (for any item or items) to a location for shipment or transfer. **Note:** • The Routing Engine does not update the create_timestamp for an order if the fulfilling location rejects the assignment and the order or lines are reassigned to a new location. • This criterion is optional. Set it to *Not Used* to exclude it from Routing Engine logic.
Sales Velocity Rank	If the Routing Engine uses the sales velocity rank criterion: *Low to High* = select the eligible location whose Sales Velocity is lowest. *High to Low* = select the eligible location whose Sales Velocity rank is highest. If there are multiple products requested, use the total sales velocity in each location for evaluation. This criterion is optional. Set it to *Not Used* to exclude it from Routing Engine logic.

Field	Description
Weighted Brokering Tab	Available at: Organization level only. **Important:** The settings at this tab apply only if *Use Weighted Brokering Rules* is selected. **Which locations are eligible for consideration?** The weighted brokering percentages apply only to locations that have not been filtered out of those sent to the Science Engine. To be eligible, a location must: • stock the item • have a sufficient quantity available, or have the Backorder Available flag selected • be flagged Delivery Available for a delivery order, or Ship For Pickup Sourcing Available for a ship-for-pickup order • not be excluded due to probability rules • not be excluded based on zone shipping • not be excluded based on exceeding the *Maximum Daily Orders*' • not be excluded based on proximity **For more information:** See *Selecting a Location for a Delivery Order* and *Selecting the Location for a Pickup Order (LocateItems)* for background. **Overrides?** You can set up overrides to these percentages, based on the originating system, order type, and express carrier flag setting. The override percentages all default to inheriting the settings from the Preferences screen, but if there is an override set up that matches the information in an order request, the override criteria apply. The overrides also apply when the Routing Engine "reshops" a rejected delivery or ship-for-pickup order. See *Order Broker Preference Overrides* for more information.
Maximum Order Splits	Indicates the maximum number of times the Science Engine can split an order when selecting fulfilling or sourcing locations. *Example:* An order includes 3 items, and each item is available only in a separate location. The Maximum Order Splits is set to 2. The result is that the entire order is unfulfillable. The Transaction Notes at the History tab of the Order screen indicates `Exceed Maximum Number of Splits`.
Weighted Percentages	The following fields indicate the relative weight to give each of the criteria used by the Science Engine to select a fulfilling or sourcing location. General rules are: • The Total Weights must add up to 100% if *Use Weighted Brokering Rules* is selected. • Each field is optional. If you leave a field blank, a percentage of 0 is applied.

Field	Description
Labor Cost	The percentage weight for the Science Engine to assign the location's location's *Labor Cost* when selecting locations from the filtered list submitted by the Routing Engine. The labor cost identifies the cost to pick, pack, and ship an order at the location. *Used how?* The location with the lowest labor cost is preferred. Enter any percentage from 0 to 100. The Total Weights must equal 100 if *Use Weighted Brokering Rules* is selected.
Gross Margin	The percentage weight for the Science Engine to assign the product location's *Margin* when selecting locations from the filtered list submitted by the Routing Engine. The margin identifies the regular *Selling Price* minus the *Cost* for the product location; however, if the product location is flagged as *On Clearance*, then the Science Engine uses a selling price of .01 for the calculation of margin. *Example:* If the selling price for a product location is 100.00, and the cost is 10.00, then the Science Engine uses a margin of 90.00 (100.00-10.00). However, if the item is flagged as on clearance, then the Science Engine uses a margin of -9.99. *Used how?* The location with the lowest margin is preferred, because that location has the lowest profit for in-store sales. Enter any percentage from 0 to 100. The Total Weights must equal 100 if *Use Weighted Brokering Rules* is selected.
Proximity	The percentage weight for the Science Engine to assign the product location's distance from the customer's address. *Used how?* The location that is the shortest distance from the customer's address is preferred. Enter any percentage from 0 to 100. The Total Weights must equal 100 if *Use Weighted Brokering Rules* is selected.
On Hand Count	The percentage weight for the Science Engine to assign to the available quantity for the product location when selecting locations from the filtered list submitted by the Routing Engine. The quantity used is the *Available to Promise* after applying any probability rules. *Used how?* The product location that has the highest on-hand count is preferred. Enter any percentage from 0 to 100. The Total Weights must equal 100 if *Use Weighted Brokering Rules* is selected.
Sales Velocity	The percentage weight for the Science Engine to assign to the *Sales Velocity* for the product location when selecting locations from the filtered list submitted by the Routing Engine. Used how? The *Priority* setting determines whether the product location that has the highest or lowest setting is preferred. Enter any percentage from 0 to 100. The Total Weights must equal 100 if *Use Weighted Brokering Rules* is selected.
Priority	Select one of the following settings when determining how the Science Engine should evaluate Sales Velocity: • Largest to Smallest (default): The highest sales velocity is preferred • Smallest to Largest: The lowest sales velocity is preferred Required if the Sales Velocity percentage is greater than 0.
Total Weights	Indicates the total of all weighted percentages. Updated as you edit percentages. The total must be 100% if *Use Weighted Brokering Rules* is selected.

Drop Ship Preferences

Purpose: Use the **Drop Ship Preferences** screen to set organization-level preferences related to the Supplier Direct Fulfillment module.

For more information: See *Setting Up Data for the Supplier Direct Fulfillment Module* for more information on setup related to Supplier Direct Fulfillment.

How to display this screen: Click the *Drop Ship Preferences* icon ( ) for an organization at the *Organizations and Preferences* screen.

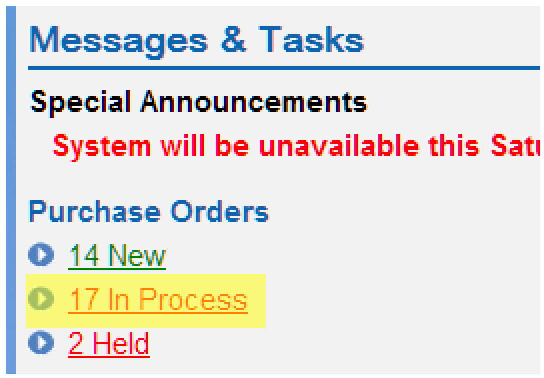
> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Organization and Preferences* authority can display this screen. See the *Role Wizard* for more information.

Fields at this screen

Field	Description
Organization	The *organization* you selected at the *Organizations and Preferences* screen. Display-only.
Vendor Portal tab	
Vendor Landing Page -- Settings	
Logo URL	Optionally, enter the URL for the logo to display in the upper left corner of Vendor Portal screens. The URL should use https rather than http. **File format:** The image file can be in JPG, PNG, or GIF format. **Image dimensions:** The recommended size is 250x35. If your entry does not point to an existing image file, no logo is displayed on Vendor Portal screens. Optionally, you can click the magnifying glass ( ) to preview the image at the recommended size. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Landing Page Refresh	Controls how often, in minutes, to refresh the information displayed at the Vendor Portal landing page. The default refresh interval is 15 minutes. Your entry cannot exceed 3 positions (999 minutes). The information on the Vendor Portal landing page also refreshes automatically when the vendor logs out and logs back in.

Field	Description
Portal UI Timeout	Enter the number of minutes that an inactive Vendor Portal session should remain open before timing out. Once a vendor user's session times out, the vendor user is presented with the Inactivity Timeout screen. The vendor user can then log in again, or close the browser window. Your entry can be from 1 to 20 minutes. The default setting is 20 minutes. Required. **Note:** Oracle recommends that the vendor user logs out of the Vendor Portal and does not just close the browser or browser tab; otherwise, the user user will not be able to log back into the Vendor Portal until the SSO session is cleared.
Portal UI Lock Out	The number of unsuccessful, sequential login attempts that triggers Order Broker to disable a vendor user account. When a vendor user attempts to log in with an inactive account, the Vendor Portal displays a general error indicating that the login failed. *Example:* If you set this number to 4, a vendor user account is made inactive after the entry of 4 incorrect passwords in a row. *Reset:* An vendor user's counter is reset: • after a successful login (for example, if there are 3 unsuccessful login attempts, followed by a successful login, the counter is reset to 0 • when you re-enable the vendor user account at the *Vendor User Profiles* screen or the *Vendor User Profile* screen Your entry can be 1 to 99 login attempts. The default setting is 5. Required.
Very Late Days	The number of days in the past the due date for an unshipped, uncanceled purchase order line needs to be to be considered "very late" for the charts on the Vendor Portal landing page. Your entry must be at least 2 and can be up to 9 positions. See *Purchase order aging chart* for a discussion.
Retailer Email Address	The email address to use as the "to" address on the email generated when a vendor clicks the E-mail the Retailer link on the Vendor Portal landing page. See *Information on the Vendor Portal landing page* for a discussion.
Email Subject	The subject line to use on the email generated when a vendor clicks the E-mail the Retailer link on the Vendor Portal landing page. See *Information on the Vendor Portal landing page* for a discussion.

Field	Description
VPA Url	The URL of the vendor portal to include as a link in email notifications to the vendor. Should be in the format of `http://SERVERNAME:7003`, where `SERVERNAME` is the name of the server and `7003` is the port number. **Format in email:** The link is in parentheses, and includes the URL you specify here, appended by `/LocateVPA/`. For example, if you enter `example.com`, the email includes a link to `example.com/LocateVPA/` in parentheses. If you do not enter a URL here, the email includes a link to `/LocateVPA/`in parentheses. **Note:** The VPA Url does not automatically append the vendor's locale to the link embedded in the email. The same URL is embedded for all vendors. **For more information:** See *Supplier Direct Fulfillment Module Email Notifications Summary*.
Announcement	The announcement to display on the Vendor Portal landing page. See the screen image under *Information on the Vendor Portal landing page*.
Invoice -- Settings	
Max POs / Invoice	The maximum number of pack slip shipments that a vendor can include on an invoice. An entry between 1 and 999999 is required. **Controls Invoice Number Length:** CWDirect and Order Management System support an invoice number of up to 11 positions; if the invoice includes multiple purchase orders, these systems append a numeric suffix to the number, including a hyphen (for example, INV456-01, INV456-02, etc.). Your entry in this field controls the maximum length of the invoice number that a vendor can create, preventing Order Broker from creating an invoice with a number that is too long for these systems. *Example:* If you support a maximum of 100 purchase orders per invoice, then Order Broker reserves 4 positions for the hyphen and the numeric suffix from the maximum of 11, supporting invoice numbers such as INV4567-500. If you support a maximum of 99 purchase orders, then Order Broker reserves only 3 positions for the hyphen and the numeric suffix.
Invoice Number Length	Calculated based on the Max POs / Invoice setting as described above. Display-only.
Integrated Shipper -- Settings	**For more information:** See *Integrated Shipping Setup, Troubleshooting, and Mapping: Supplier Direct Fulfillment*.

Field	Description
Integration Enabled	Controls whether the Integrated Shipping screen is available to vendors so that they can confirm shipments through integration with an integrated shipping system such as ADSI. **Link in Messages and Tasks area on Landing Page:** If this preference is selected, the number of purchase orders in process link in the *Messages and Tasks* area of the Vendor Portal landing page takes the vendor user to the **Integrated Shipping** screen. Otherwise, if this preference is not selected, the link takes the vendor user to the **Purchase Order Shipping** screen.  When this flag is selected, you need to: • enter a return address at the *New Brand* or *Edit Brand* screen in Modern View. This address prints on the shipping label when the vendor confirms shipments through the **Integrated Shipping** screen. • use the Boxes screen in Modern View to define the dimensions of a box used to ship one or more items using an integrated shipping system and whether the box is available in the Supplier Direct Fulfillment module.
Shipper URL	Enter the URL to use for the integrated shipping system when the vendor confirms shipments through the Integrated Shipping screen. Required if the Integration Enabled flag is selected. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Shipper Name	Enter the code that identifies you to the integrated shipping system. Required if the Integration Enabled flag is selected.
Email tab	
PO Status Notification	Select this flag and enter one or more email addresses to receive an email notification when the vendor: • puts a purchase order line on hold, or releases it from hold • revises the delivery date of a purchase order line • enters a Reason Description for a purchase order line, even without changing its hold status or delivery date • accepts or rejects an address change or cancellation request At least one email address is required if the flag is selected.t Separate each additional email address with a semicolon and no space.

Field	Description
Upload Error Notification	Select this flag and enter one or more email addresses to receive an email notification when the vendor uploads a file of shipment confirmations or invoices that result in any errors. At least one email address is required if the flag is selected. Separate each additional email address with a semicolon and no space.
Invoice Balance Notification	Select this flag and enter one or more email addresses to receive an email notification when the vendor submits an invoice that includes an *out-of-balance* line. At least one email address is required if the flag is selected. See the *Out-of-balance invoice notification email to retailer* for a sample. Separate each additional email address with a semicolon and no space.

Integrated Shipping Setup, Troubleshooting, and Mapping: Supplier Direct Fulfillment

Required setup: The setup required for shipping through an integrated system such as ADSI includes:

- *Drop Ship Preferences:* the settings described above under *Integrated Shipper -- Settings* at the **Drop Ship Preferences** screen.
- *Brand return address:* The brand return address information is used as the return address on the shipping label, and must include:
  - contact name and company name
  - street address line 1
  - U.S. city, state/province, and postal code
  - phone number of 10 positions, plus any formatting (for example, (508) 555-1111). The brand phone number is used if there is not a day or evening phone number for the purchase order shipping address.
- *Carrier codes:* The service codes set up in the integrated shipping system should match the carrier codes set up and assigned to vendors in Order Broker. If the service codes include leading zeros, then the carrier codes must match; for example, *1* is not a match for `01`.
- *Boxes:* The dimensions of the box used with each shipment is required for all purchase orders using an integrated shipping system. If your vendors use the Integrated Shipping screen to confirm shipments, the system requires you to select the box size on the Estimated Weight and Dimensions window. The vendor user can select one of the predefined box sizes or manually define the length, width, and height of the box.
- *Vendor contact address:* The vendor contact address is used as the originating address, and must include:
  - street address line 1
  - U.S. city, state/province, and postal code
  - phone number of 10 positions, plus any formatting (for example, (508) 555-1111).

- *Vendor user authority:* In order to use the **Integrated Shipping** screen, vendor users require Integrated Shipping authority. See the *Role Wizard* for background.
- *allow list:* If a vendor attempts to ship through integration with ADSI and the URL is not on the *allow list*, the Vendor Portal screen opens a pop-up window indicating an unhandled ADSI error. Also, an error message is written to the server log.

Restrictions for integrated shipping:

- *International shipping not supported:* Shipping to addresses outside of the United States is not currently supported through the **Integrated Shipping** screen.
- *Address line and apartment/suite:* Address line 2 cannot exceed 35 positions; also, the apartment/suite number is appended to address line 2. If the address line 2 exceeds 35 positions, ADSI truncates the line for a Federal Express carrier, and returns an error for a UPS carrier.
- *Newgistics not supported:* Shipping with Newgistics is not supported for drop shipments.

To help identify possible response delays, the response time is logged.

- *Duplicate service codes:* If you set up multiple service codes in ADSI for the same carrier, the first service code is used on the shipment regardless of whether it was the carrier selected for the purchase order. For example, if you set up both service code 10 and service code 20 in ADSI as UPS Next Day, and the vendor confirms the shipment using carrier 20, service code 10 is returned from the integrated shipping system.
- *Rate shopping:* If the vendor confirms a shipment using a rate-shopping service code, and ADSI returns a code that is not currently a valid carrier in Order Broker, Order Broker automatically creates the carrier code, but does not assign the new carrier to the vendor.

Integrated Shipping Mapping: Supplier Direct Fulfillment

Message Element	Field or Information Passed	Notes
Address		The address information passed is from the xom_shipping table unless otherwise indicated.
contact	The first name and last name from the shipping address.	Blank if there is just a company name but no customer first and last name.
company	The company name from the shipping address.	Some carriers require company name. If the ship-to address does not have a company name, Order Broker sends the first and last name as the company name, but sets the ResidentialFlag to true; otherwise, the ResidentialFlag is set to false.
address1	The first address line (address_1) of the shipping address.	Only the first address line is sent to ADSI.
address2	The apartment/suite, if any, of the shipping address.	
city	The city of the shipping address.	

Message Element	Field or Information Passed	Notes
state	The two-position state code.	
postalCode	The zip or postal code.	
country.friendlyName	The country for the shipping address.	
phone	• day phone, if any, for the shipping address; otherwise, • evening phone, if any, for the shipping address; otherwise, • phone number from the brand return address.	
Service		
Service.friendlyName	The carrier code identifying the carrier shipping the order.	The service codes set up in the integrated shipping system should match the carrier codes set up and assigned to vendors in Order Broker. If the service codes include leading zeros, then the carrier codes must match; for example, *1* is not a match for `01`.
Terms	Set to TRM_SHIPPER.	
ResidentialFlag	Set to false if a company name is specified; otherwise, set to true.	
ProofOfDeliveryFlag	Set to false.	
ShipperName	Set to ADSI.	
ShipDate	Set to the current date and time.	
ShipperReference	The purchase order number.	
ConsigneeReference	The purchase order number.	
ArrayOfNameValuePair		This section of the request message uses name/value pairs to provide information.
name	**value**	
SERVICE_CODE	The carrier code identifying the carrier shipping the order.	The service codes set up in the integrated shipping system should match the carrier codes set up and assigned to vendors in Order Broker. If the service codes include leading zeros, then the carrier codes must match; for example, *1* is not a match for `01`.
The names with the ORIGINNA prefix provide information from the vendor record’s contact information.		
ORIGINNA_COMPANY	The vendor name.	

Message Element	Field or Information Passed	Notes
ORIGINNA_CONTACT	The vendor's contact name.	
ORIGINNA_ADDRESS1	The first address line from the vendor's contact address.	
ORIGINNA_ADDRESS2	The second address line and suite, if any, from the vendor's contact address.	The third address line, if any, is not sent.
ORIGINNA_CITY	The city from the vendor's contact address.	
ORIGINNA_STATE	The state or province code from the vendor's contact address.	
ORIGINNA_POSTALCODE	The zip or postal code from the vendor's contact address.	
ORIGINNA_PHONE	The telephone number from the vendor's contact address.	
The names with the RETURNNA provide information from the brand's return address information.		
RETURNNA_COMPANY	The company name from the brand's return address.	
RETURNNA_CONTACT	The contact name from the brand's return address.	
RETURNNA_ADDRESS1	The first address line from the brand's return address.	
RETURNNNA_ADDRESS2	The second address line and suite, if any, from the brand's return address.	The third and fourth address lines, if any, are not sent.
RETURNNA_CITY	The city from the brand's return address.	
RETURNNA_STATE	The state or province code from the brand's return address.	
RETURNNA_POSTALCODE	The zip or postal code from the brand's return address.	
RETURNNA_PHONE	The telephone number from the brand's return address.	
Package2 The remaining information in the message provides information on the package and the required label.		

Message Element	Field or Information Passed	Notes
Weight	The weight of the package, including up to a 4-position decimal.	Calculated by multiplying the unit_ship_weight, if any, from the CreateDSOrder message for each item being shipped by the shipping quantity. Otherwise, if no weight was passed for the purchase order, the vendor needs to enter a total shipping weight.
Dimension	The dimensions of the box, such as 1.0x1.0x1.0.	
LabelType	Set to PNG.	
ROTATION_DEFAULT	Set to ROTATION_DEFAULT.	

Preview Image

Purpose: Use the **Preview Image** window to preview the logo URL for a brand at the dimensions used for display or printing.

Used for the Supplier Direct Fulfillment module and the Store Connect module.

How to display this window: Click the preview icon ( ) next to the Logo URL field:

- *New Brand* or *Edit Brand* screen in Modern View: The Logo URL field is available in the *Brand Logo* folder under the *Preferences* tab. Indicates the logo to print on the graphical pack slip and pullsheet. The idea dimensions are 225 x 50.
- *Drop Ship Preferences* screen: The Logo URL field is available under the *Vendor Portal* tab. Indicates the logo to display in the upper left corner of Vendor Portal screens. The ideal dimensions are 250 x 35.
- *Store Connect Preferences* screen: The Logo URL field is available under the *General* tab. Indicates the logo to print on the packing slip. The ideal dimensions are 29x18.

> **Note:**
>
> Oracle staff need to make sure that this URL is added to the *allow list*.

Store Connect Preferences

Purpose: Use the **Store Connect Preferences** screen to set preferences related to the Store Connect module.

For more information: See *Setting Up Data for the Store Connect Module* for more information on setup related to the Store Connect module, and see the *Store Connect Overview* for background.

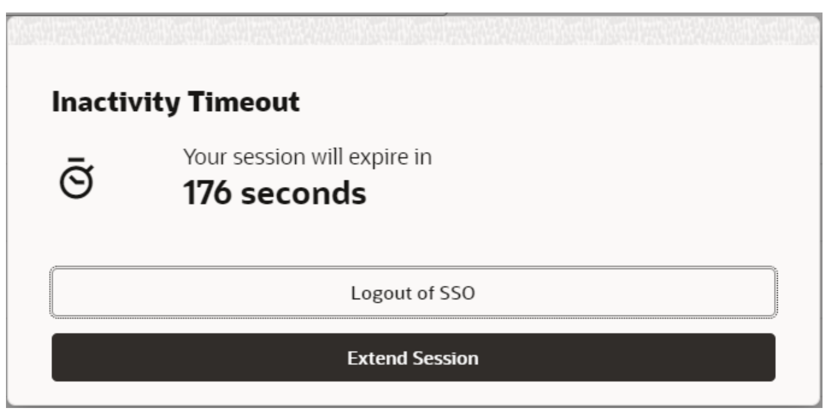
How are orders assigned to Store Connect locations? The Order Broker preferences set up at the *Preferences* screen control the assignment of delivery orders to all locations, including Store Connect locations. These preferences also apply to ship-for-pickup or store pickup order assignment; for example, a Store Connect location must be flagged as Pickup Available. See the *Preferences* screen for more information.

How to display this screen: Click the *Store Connect Preferences* icon ( ) for an organization at the *Organizations and Preferences* screen. This screen is available only if you have flagged a system as the *Store Connect Default*. See the *Systems* screen or *Setting Up Data for the Store Connect Module* for more information.

Note:

Available if Use Store Connect is selected at the *Tenant* screen. Only users with *Organization and Preferences* authority can display this screen. See the *Role Wizard* for more information.

Fields at this screen

Field	Description
Organization	The code and name of the *organization* you selected at the *Organizations and Preferences* screen. Display-only.
Store Connect System	The code and name of the system flagged as the *Store Connect Default* for the organization. Display-only.
General tab	
Settings	
Associate UI Timeout	Enter the number of minutes that an inactive store associate session should remain open before timing out. **Inactivity warning:** Three minutes before the associate's session is due to time out, an **Inactivity Timeout** window indicates when the session will expire and provides an option to log out of SSO or extend the session.  Your entry can be 15 to 1440 minutes. The default setting is 15 minutes. Required.

Field	Description
Logo URL	Enter the URL of the logo in the upper left corner of each Store Connect screen. The URL should use https rather than http. **Note:** The recommended logo size is 29 x 18, but can be larger if it is proportional to these dimensions. *Preview:* Click the magnifying glass ( ) to preview the logo as it will appear on the screen. If you leave this field blank, then the screen does not include a logo. If a logo URL is specified, but there is no logo at the specified URL, then the screen displays a broken image icon. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Order Age Thresholds	

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Order Age Hours</td><td>
Enter the number of hours within which store associates should process new delivery, pickup, or ship-for-pickup orders:

delivery orders should be shipped within this number of hours
pickup orders should be picked and ready for pickup within this number of hours
ship-for-pickup orders:

the sourcing location should ship the order to the pickup location within this number of hours
the pickup location, if it is also the sourcing location, should have the order picked and ready for pickup within this number of hours

Your entry should be a whole number from 1 to 999, or it should be blank. This setting is available at the Store Connect system level only.
Calculated how? The age is calculated based on the date and time when the oldest open (uncompleted) line was created:

delivery orders or the sourcing location for ship-for-pickup orders: the date and time when the oldest line still in polled, accepted, or picked status was created (that is, not yet shipped)
pickup orders or the pickup location when it is also the sourcing location for ship-for-pickup orders: the date and time when the oldest line still in polled or accepted status was created (that is, not yet picked)

When an order’s age meets this number of hours: A red triangle is displayed next to the Age on Store Connect screens, and the date itself is in red, indicating that the order has exceeded your service level, as in the following example. Note that the order date is still highlighted even if the order is under review and cannot yet be fulfilled.
12/7/2021
The indicator indicates that store associate action is required, so it is not displayed for pickup or ship-for-pickup orders that have been processed for store associates and are ready for customer pickup, regardless of when the order was created.
Displayed on which screens in Store Connect: The order age indicator is displayed at the New Orders, Ready to Pick, and Ready to Ship screens in Store Connect screens for orders that exceed the Order Age Hours, as described above.
If no Order Age Hours specified: If you leave this field blank, then the Store Connect screens never display the order date in red, bold text. You should either enter a number of hours from 1 to 99 or leave the field blank; 0 is not a valid entry. This setting is available at the Store Connect system level only.
Reshopped delivery orders: If the original store location assigned to fulfill a delivery order rejects the order, the order’s age is still calculated based on the original date and time. When the order is assigned to a different store location, the order date may be displayed in red, bold text even though the order is new to the second store.
The same calculation applies to reassigning the sourcing the location for ship-for-pickup orders.
Orders placed outside of a store location’s business hours: The calculation of order age does not reflect whether the order was placed during the store location’s regular business hours. For example, if the order is created at 6 o’clock, and the store location opens at 10 o’clock, the order’s age is calculated as 4 hours.
</td></tr>
</table>

Field	Description
Unclaimed Orders Hours	This field is not currently implemented.
Pick/Pack Preferences tab (Pick Pack)	These fields control the generation of the pick list pull sheet and the packing slip, including the programs to print them, and the logo and messages to include on the printed documents.
Pick List Pull Sheet Form	Specifies the BI Publisher template to generate the pick list pull sheet for delivery and pickup orders. Set to `ob_pullsheet_report` and should not be changed if the pull sheet should be generated. See *Pick List Pull Sheet* for information on form contents. Up to 20 positions. Required. Language, date and time formats, and number formats are from the organization. If you leave this field blank, or if your entry is not `ob_pullsheet_report`, no pick list pull sheet PDFs are generated in Store Connect.
Pack Slip Form	Specifies the BI Publisher template to generate the packing slip for a delivery or pickup order. `Set to ob_packslip_stc_report` and should not be changed. Up to 20 positions. Required. *Sample:* See the *Packing Slip*. If you leave this field blank, or if your entry is not `ob_packslip_stc_report`, no packing slip PDFs are generated in Store Connect.
Logo URL (packing slip)	Not currently used.
Delivery Pack Slip Message	Optionally, enter a message to print on packing slips for delivery orders. The message prints below the addresses and above the items. See the *Packing Slip* for an example. Your entry can be up to 240 positions.
Pick Up Pack Slip Message	Optionally, enter a message to print on packing slips for pickup and ship-for-pickup orders. The message prints below the address and above the items. See the *Packing Slip* for an example. Your entry can be up to 240 positions.
Printing Preferences tab (Printing)	*Printing Preference Configuration* **Printing preference hierarchy:** You should set printing preferences at the Store Connect system level, and can also set them at the location type or location level. The hierarchy is: 1. Use the setting at the location, if any. 2. If the setting for the location is *Not Defined*, use the setting at the location type, if any. 3. If the setting for the location type is *Not Defined*, use the setting for the Store Connect system.
Navigational fields	These fields are in the left-hand side of the screen, below the heading information.

Field	Description
System	When you first advance to this tab, the location hierarchy is displayed in the left-hand pane, collapsed to the level of the Store Connect system for the organization you selected at the Organizations and Preferences screen. *Printing preferences specified?* The system code and system name are displayed. A blue arrow ( ) is always displayed next to the system, and is also displayed next to a location type or location to indicate if you have set printing preferences.
Type	When you expand the System to highlight a location type in the left-hand pane, the location type's code and name are displayed. A blue arrow next to the location type indicates that you have set a printing preference at that level or lower. This setting, if any, applies if there is no setting at the location level. If the setting is *Not Defined* at both the location and location type level, the setting for the Store Connect system applies.
Location	When you expand the location type to highlight a location in the left-hand pane, the location's code and name are displayed. If Print Pick List Pull Sheet is set to *Not Defined* at the location level, the location type-level setting, if any, applies; and if Print Pick List Pull Sheet is set to *Not Defined* at the location type level, the system-level setting applies.
Printing Preference settings	The preference settings at the Printing tab are described below.
Print Pick List Pull Sheet	Indicates whether to generate the Pick List Pull Sheet. Options at each level are Yes, No, and Not Defined. You can set this preference at three levels: 1. The Store Connect system level 2. The Store Connect location type level 3. The individual store location level If the setting is Not Defined at the location level, then the location type level setting applies. If the setting is also Not Defined at the location type level, then the Store Connect system setting applies. The Pick List Pull Sheet is generated when the store associate accepts the order. If multiple orders are accepted at the same time, the details for all accepted orders are included on the Pull Sheet.

Field	Description
Print Pack Documents	Indicates whether to generate the Packing Slip for a delivery or pickup order, and the shipment label for a delivery order. You can set this preference at three levels: 1. The Store Connect system level 2. The Store Connect location type level 3. The individual store location level If the setting is Not Defined at the location level, then the location type level setting applies. If the setting is also Not Defined at the location type level, then the Store Connect system setting applies. Options at each level are: • None: Do not print pack documents. • Order Accept: Print pack documents when the order is accepted. • Pick: Print pack documents when the order is picked. • Order Accept and Pick: Print pack documents when the order is accepted and when the order is picked. • Fulfillment: Print pack documents when a delivery order is shipped or when a pickup order is picked up. • Not Defined: Use the setting from the higher level; for example, if the setting for a location is Not Defined; use the setting from the location type level. The associate can still print the Packing Slip on demand from most screens in Store Connect if the order has been accepted and not yet fulfilled. **Note:** Unless a setting of Fulfillment applies to the store location, the correct items and quantities may not be reflected in the Packing Slip if the associate performs a partial shipment or pickup.
Print Pack Document at Receipt	Indicates whether to generate the Packing Slip for a ship-for-pickup order when it is received at the Receive Order screen at the pickup location. You can set this preference to Yes or No at three levels: 1. The Store Connect system level 2. The Store Connect location type level 3. The individual store location level A setting of Yes or No is available at all levels, and a setting of Not Defined is also available at the location type level and the store location level. If the setting is Not Defined at the location level, then the location type level setting applies. If the setting is also Not Defined at the location type level, then the Store Connect system setting applies. At the pickup location, you can also print the Packing Slip at the Ready To Pick Up screen.

Field	Description
Print Pack Document at Intransit	Indicates whether to generate the Packing Slip for a ship-for-pickup order when it shipped from the sourcing location to the pickup location at the Ship Order screen. You can set this preference to Yes or No at three levels: 1. The Store Connect system level 2. The Store Connect location type level 3. The individual store location level A setting of Yes or No is available at all levels, and a setting of Not Defined is also available at the location type level and the store location level. If the setting is Not Defined at the location level, then the location type level setting applies. If the setting is also Not Defined at the location type level, then the Store Connect system setting applies. At the sourcing location, you can also print the Packing Slip at the Ready to Pick and Ready to Ship screens. **Note:** Printing the pack document when the order is intransit is recommended if your organization supports partial shipments, so that the quantities on the pack document reflect the actual units selected for shipment to the pickup location. Also, the pack document can be used as a reference in the sourcing location for the quantities shipped.
Shipping Preferences tab (Shipping)	*Shipping Service Configuration* **Shipping preference hierarchy:** In order to use ADSI or the Standard Shipping Service to ship delivery orders at any Store Connect location, you need to specify the shipping service and complete the additional fields at this tab at the Store Connect system level. You must then set the *Shipping Service* preference at the system level, and can also set it at the location type or location level. The hierarchy is: 1. Use the setting at the location, if any. 2. If the setting for the location is *Not Defined*, use the setting at the location type, if any. 3. If the setting for the location type is *Not Defined*, use the setting for the Store Connect system.
Navigational fields	These fields are in the left-hand side of the screen, below the heading information.
System	When you first advance to this tab, the location hierarchy is displayed in the left-hand pane, collapsed to the level of the Store Connect system for the organization you selected at the *Organizations and Preferences* screen. *Shipping Service specified?* The system code and system name are displayed. A blue arrow () is always displayed next to the system, and is also displayed next to a location type or location to indicate if you have specified a Shipping Service of either *ADSI* or *Manual* at that level or lower.
Type	When you expand the *System* to highlight a *location type* in the left-hand pane, the location type's code and name are displayed. A blue arrow next to the location type indicates that you have set a shipping preference at that level or lower. This setting, if any, applies if there is no setting at the location level. If the setting is *Not Defined* at both the location and location type level, the setting for the Store Connect system applies.

Field	Description
Location	When you expand the *location type* to highlight a *location* in the left-hand pane, the location's code and name are displayed. If the Shipping Service is set to *Not Defined* at the location level, the location type-level setting, if any, applies; and if the Shipping Service is set to *Not Defined* at the location type level, the system-level setting applies.
Shipping Preference settings	
Shipping Service	Use this drop-down field to select the shipping service to use for shipments from Store Connect. **Defining shipping services:** Shipping service types are ADSI or Standard Shipping. Shipping services are configured through the *External Services* screen. See that screen for background. **Inactive?** Inactive services are indicated in the shipping service name, for example: *Standard Shipping (Inactive)*. If the selected shipping service that applies to a location is currently inactive, only manual shipping is available in Store Connect. **Manual:** Following the list of shipping services defined at the Manage External Services screen, the *Manual* shipping option is available. When the *Manual* shipping option applies at a store location, no shipping service is available. **Not Defined:** If the setting is *Not Defined*, the higher-level setting applies, as described above. This setting is not available at the Store Connect system level. **Note:** If the shipping service that applies to a store location changes while a store associate is currently logged into Store Connect, the change does not actually take effect until the user logs out and then logs back in.
Shipping Label Return Address	Select the location to submit to ADSI or the Standard Shipping Service as the return address for shipments: • *Placed Location* : The location that originated the order • *Fulfilling Location* (default): The store location fulfilling the order • *Selected Location:* Another location in your organization. If you select this option, the Location for Return Address field opens, so you can select the location to use as the return address. **Note:** The return address location must include: • contact name and company name • street address line 1 • U.S. city, state/province, and postal code • phone number of 10 positions, plus any formatting (for example, (508) 555-1111). The store location phone number is used if there is not a day or evening phone number for the order shipping address. All locations for all systems within your organization are available for selection. Available only at the Store Connect system level, and only if the Shipping Service is set to Standard Shiping Service or ADSI. Required if the Shipping Service is *ADSI*. See the *Edit Location* screen for more information on setting up locations. A change to the shipping label return address takes effect immediately in Store Connect.

Field	Description
Location for Return Address	Available and required only if the *Shipping Label Return Address* is set to **Selected Location**. In this case, you need to select the location whose address should be the return address for the shipping label. See above for return address requirements. **Note:** You should not select the unfulfillable location. A change to the location return address takes effect immediately in Store Connect.
Email tab	*Email Notifications* The following settings control the email notifications sent to customers and to notify store locations of new orders.
Retailer Email Address	Not currently implemented.
Cust Service From Email Address Alias	The “from” address, if any, to display as the alias for the system-defined “from” address for email notifications to the customer (*Shipment Notification Email*, *Pickup Ready Reminder to Customer (Pickup Order)*, and *Pickup Ready Notification to Customer*). For example, emails specify the “from” address as `My Email Alias <no-reply-omni@oracledomain.com>`, where My Email Alias is the alias entered here. The actual “from” address is set by Oracle and cannot be changed. Your entry can be up to 40 positions and can include letters, numbers, spaces, and special characters, and does not need to be a valid, existing email address. If you do not specify an email alias here, Order Broker generates emails using the defined “from” email address without including an alias. **Note:** To generate Store Connect emails with a customized “from” email address rather than the default, you can use the Email Out API. See the Operations Guide on My Oracle Support (ID 2114324.1) for more information.
Send New Order Notifications	Set this flag set to Yes in order to send a new order notification email to the *Emails* specified for the location if it is a Store Connect location. Otherwise, leave this flag set to No. See: • contents: *New Order Notification to Store Connect Location* • email setup information: *Store Connect Email Notifications Summary* • overview: *Notifying Store Connect Locations about New Orders*

Field	Description
Shipment Notification Email Generation Type	Indicates whether to have Order Broker generate the shipment confirmation email, or to have the content for the email available for retrieval through an API, so that you can use an external service to generate email. Available settings: • *Do Not Send:* Do not generate a shipment notification email. • *Standard Email Service:* The email information is available for retrieval through the Email Out API so that you can use an external service to generate the email. • *System Generated Email:* Order Broker generates the shipment confirmation, as described under *Shipment Confirmation to Customer (Delivery Order)*. **Default setting after upgrade:** When you upgrade from a previous version that had a template specified for this email type, this field defaults to *System Generated Email*; otherwise, the email type defaults to *Do Not Send*. **For more information:** See the Operations Guide for details on the Email Out API.
Pickup Ready Notification Email Generation Type	Indicates whether to have Order Broker generate the pickup ready notification email for pickup or ship-for-pickup orders, or to have the content for the email available for retrieval through an API, so that you can use an external service to generate email. Available settings: • *Do Not Send:* Do not generate a pickup ready notification email. • *Standard Email Service:* The email information is available for retrieval through the Email Out API so that you can use an external service to generate the email. • *System Generated Email:* Order Broker generates the pickup ready notification. **Default setting after upgrade:** When you upgrade from a previous version that had a template specified for this email type, this field defaults to *System Generated Email*; otherwise, the email type defaults to *Do Not Send*. **For more information:** See the Operations Guide for details on the Email Out API.
Pickup Ready Reminder Email Generation Type	Indicates whether to have Order Broker generate the pickup ready reminder email for pickup or ship-for-pickup orders, or to have the content for the email available for retrieval through an API, so that you can use an external service to generate email. Available settings: • *Do Not Send:* Do not generate a pickup ready reminder email. • *Standard Email Service:* The email information is available for retrieval through the Email Out API so that you can use an external service to generate the email. • *System Generated Email:* Order Broker generates the pickup ready reminder. See *Pickup Ready Reminder to Customer (Pickup Order)*. **Default setting after upgrade:** When you upgrade from a previous version that had a template specified for this email type, this field defaults to *System Generated Email*; otherwise, the email type defaults to *Do Not Send*. **For more information:** See the Operations Guide for details on the Email Out API.

Field	Description
Logo URL (email)	The URL for the logo to include on email notifications to customers. The URL should use https rather than http. Not currently implemented. Emails include the image at a size 225 x 50 pixels. See *Store Connect Email Notifications Summary* for a list of email notifications to customers. **Preview the logo:** After entering the URL, click the preview icon ( ) to preview the image at 225 x 50. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.

Order Broker Preference Overrides

Purpose: Use this screen to work with overrides to the *Order Broker Settings* for your organization, set up at the *Preferences* screen. These preference settings control the ranking of fulfilling or sourcing locations for order assignment, or the sort order of fulfilling or sourcing locations returned in the locate items message.

Example: You can have the Routing Engine rank locations for a pickup request based first on proximity, while it ranks locations for a delivery request based first on available quantity.

Criteria that you can override:

- If weighted brokering is not enabled: If the *Use Weighted Brokering Rules* setting at the *Preferences* screen is not selected at the *Preferences* screen, the settings you can override are the Order Broker criteria of Proximity, On Hand Count, Location Priority, Last Order Assigned, and Sales Velocity. The Routing Engine uses these criteria when selecting the fulfilling or sourcing location for an order or responding to a locate items or product availability request.
- If weighted brokering is enabled: If the *Use Weighted Brokering Rules* setting at the *Preferences* screen is selected, the settings you can override are the Order Broker criteria of Labor Cost, Gross Margin, Proximity, On Hand Count, Sales Velocity, and Priority. The Routing Engine uses these criteria when selecting the fulfilling or sourcing location for an order or responding to a locate items or product availability request.

For more information: See the *Fulfillment Tab* at the **Preferences** screen for background.

Inherit from Preferences? This screen displays all possible overrides, which are created automatically when you create and set preferences for systems that can originate orders; however, each is set, by default, to inherit the settings from the **Preferences** screen. Changing an override is optional, and unless you make a change, the Routing Engine uses the default preference settings. If you do change an override, you can change it back to the default settings at any time.

Types of overrides: There is a separate override available for each combination of order type, originating system, and express carrier setting:

- order type or search type of Delivery, Pickup or Ship For Pickup
- Indicates how the order should be fulfilled: shipped directly to the customer (*delivery order*), picked up at a specified location (*pickup order*), or transferred from a sourcing location to a pickup location (*ship-for-pickup order*)
- Based on:

  - the order type specified in the SubmitOrder request for a new order
  - the order type assigned to an existing delivery or ship-for-pickup order that is rejected by the fulfilling, sourcing, or pickup location, so that the Routing Engine searches for another location
  - the fulfillment type specified for a locate items or product availability request
- originating system:
  - This is the system that originally submits the order; or, in the case of the locate items message, this is the system submitting the search request.
  - The Routing Engine always uses the override setting for the originating system when routing an order, even if the order has been rejected, and it is finding another fulfilling location (“reshopping” the order).

> **Note:**
>
> There is no override available for the default vendor system, since this system never originates orders, locate items requests, or product availability requests to the Routing Engine.

- Express carrier:
  - Based on the Express setting for the carrier on a delivery or ship-for-pickup order.
  - If there is no carrier specified in the SubmitOrder message for a delivery or ship-for-pickup order, the Routing Engine uses the override setting based on the Express setting for the *Default Carrier* specified at the **Preferences** screen. The default carrier’s setting also applies for locate items and product availability requests with fulfillment types of DELIVERY or SHIPFORPICKUP.

> **Note:**
>
> The option to condition by express carrier does not apply to a pickup order.

Summary of possible combinations per system: For each system in the organization that can submit sales orders, the following override combinations are created automatically with the settings inherited from the **Preferences** screen:

- Delivery, Express carrier
- Delivery, not Express carrier
- Pickup
- Ship-for-pickup, Express carrier
- Ship-for-pickup, not Express carrier

Pickup location preferences: When the Routing Engine receives a web service request searching for locations that could fulfill a pickup order:

- If *Use Weighted Brokering Rules* is unselected: The LocateItems response uses Standard Brokering rules from the *Preferences* screen, while the Product Availability response lists the locations in order of proximity.

- If *Use Weighted Brokering Rules* is selected: Both the LocateItems response and the Product Availability response list the locations in order of proximity.

> **Note:**
>
> Because the Standard Brokering Rules never apply to searches for pickup orders when *Use Weighted Brokering Rules* is selected, the *Browse Order Broker Preference Override* window does not display any preference rules for a pickup order type. Although you can work with the Standard Brokering Rules at the *Edit Order Broker Preference Override* screen, these settings are never used if you use weighted brokering.

Vendor system? Since the default vendor system cannot submit sales orders or search for product availability, it does not have preference overrides.

Store Connect system? Typically, overrides set for the Store Connect system are not used, since Store Connect does not create orders.

Used for the Routing Engine module.

How to display this screen: Select *Preference Override* from the *Home Screen* or from the *Locations Menu*. You must complete the *Preferences* screen for an organization before you can work with overrides.

> **Note:**
>
> - Available if Use Routing Engine is selected at the *Tenant* screen.
> - You can work with preference overrides only if you have completed the *Preferences* screen for the organization.
> - When you create an organization, you need to first select *Save* at the **Preferences** screen in order to create the override combinations to display at this screen. Saving preferences is required before you can submit locate items requests and orders to the Routing Engine.
> - Only users with *Order Broker Preference Overrides* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
search for a preference override for an order type, originating system, and express carrier setting combination	The *organization* associated with your *Default Shipping System* is selected by default, and the overrides associated with that organization are displayed. Use any combination of the fields at the top of the screen to restrict the search results to matching overrides: • Optionally, select a different *organization* from the Organization drop-down box to restrict your results to this organization. **Note:** You can also select a blank organization to remove this field from your selection criteria. • Optionally, select an Order Type to restrict your results to overrides for that order type. You can select an order type of Pickup, Delivery, or Ship For Pickup. • Optionally, select an Originating System to restrict your results to overrides for that system. You can set up overrides for any system for the selected organization, provided it is not the default vendor system, since this system cannot originate sales orders. • Click *Search*.
change the settings for an override based on order type, originating system, and express carrier setting combination, or change the combination back to inherit the settings from the Preferences screen	Select the edit icon ( ) to advance to the *Edit Order Broker Preference Override* screen. **Note:** You cannot delete the override settings. Leave the settings flagged to inherit the default in order to have the combination using the same sort criteria as those specified at the **Preferences** screen.
review the settings for an override based on order type, originating system, and express carrier setting combination	Highlight an override by clicking it in order to open the *Browse Order Broker Preference Override* window.

Fields at this screen

Field	Description
Search/new fields:	
Organization	See *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.

Field	Description
Order Type	Optionally, select an order type and click *Search* to display overrides that match your selection. Possible order types are: • Pickup • Delivery • Ship For Pickup To determine the order type, the Routing Engine uses: • SubmitOrder requests: the transaction_type_id • LocateItems requests and ProductAvailability requests: the fulfillment_type • “reshopping” a rejected order: the order type of the rejected order
Originating System	Optionally, select an originating system and click *Search* to display overrides that match your selection. Each system in the selected organization is available for selection, excluding any system flagged as the vendor default.
Results fields:	
Organization	See *organization*.
Order Type	Indicates the order type that is subject to the override. Possible order types are: • Delivery • Pickup • Ship For Pickup To determine the order type, the Routing Engine uses: • SubmitOrder requests: the transaction_type_id • LocateItems requests or ProductAvailability requests: the fulfillment_type • “reshopping” a rejected order: the order type of the rejected order
Originating System	Indicates the system that originates the order, locate items request, or product availability request that is subject to the override. The vendor default system is not displayed, since it cannot originate sales orders.
Express Carrier	A green check ( ) indicates that delivery,and ship-for-pickup orders are subject to the override only if the Express setting is selected. The Routing Engine determines the Express setting for a request by: • Submit order requests: the ship_via, if specified in the request; otherwise, the setting of the *Default Carrier* specified at the **Preferences** screen • Locate items requests and product availability requests: the setting of the *Default Carrier* specified at the **Preferences** screen • “Reshopping” a rejected order: the setting of the carrier on the rejected order This setting does not apply to pickup orders.
Inherit from Preferences	A green check ( ) indicates the Routing Engine is currently set to use the default settings from the **Preferences** screen rather than an override.

Field	Description
Edit	Select the edit icon ( ) next to an override to advance to the *Edit Order Broker Preference Override* screen.

Edit Order Broker Preference Override

Purpose: Use the **Edit Order Broker Preference Override** screen to review or update preference overrides that apply to an order type and originating system. In the case of a delivery or ship-for-pickup order, the Routing Engine also uses the override only if the Express setting is consistent with the carrier on the order.

For more information: See the *Order Broker Preference Overrides* screen for a discussion.

Used for the Routing Engine module.

How to display this screen: Click the edit icon ( ) for an override at the *Order Broker Preference Overrides* screen.

- Available if Use Routing Engine is selected at the *Tenant* screen.
- Only users with *Order Broker Preferences Overrides* authority can display this screen. See the *Role Wizard* for more information.
- If *Use Weighted Brokering Rules* is selected at the *Preferences* screen, the *Weighted Percentages* are displayed; otherwise, the fields from the *Standard Brokering* tab at the Preferences screen are displayed.
- If the **Edit Order Broker Preference Override** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previously-selected override displayed.

Pickup location preferences: When the Routing Engine receives a web service request searching for locations that could fulfill a pickup order:

- If *Use Weighted Brokering Rules* is unselected: The LocateItems response uses Standard Brokering rules from the *Preferences* screen, while the Product Availability response lists the locations in order of proximity.
- If *Use Weighted Brokering Rules* is selected: Both the LocateItems response and the Product Availability response list the locations in order of proximity.

Note:

Because the Standard Brokering Rules never apply to searches for pickup orders when *Use Weighted Brokering Rules* is selected, the *Browse Order Broker Preference Override* window does not display any preference rules for a pickup order type. Although you can work with the Standard Brokering Rules at the Edit Order Broker Preference Override screen, these settings are never used if you use weighted brokering

Updating override settings

To set up an override from the default **Preference** settings:

1. Unselect the Inherit from Order Broker Preferences flag to make the remaining fields enterable.
2. Edit the preference settings. See the *Fulfillment Tab* at the **Preferences** screen for background.
3. Select *Save* when you are done.

Set back to inheriting defaults: To change the override to go back to the default preference settings, select the Inherit from Order Broker Preferences flag and select *Save*.

Fields at this screen

Field	Description
Informational fields:	
Organization	The *organization* associated with the originating system. Display-only. The organization code and name are displayed, separated by a hyphen (-).
Originating System	The system originating the order or the product search request subject to the override. Display-only. The system code and description are displayed, separated by a hyphen (-). • This is the system that originally submits the order; or, in the case of a locate items or product availability request message, this is the system submitting the request. • The Routing Engine always uses the override setting for the originating system when routing an order, even if the order has been rejected, and it is finding another fulfilling or sourcing location ("reshopping" the order).
Order Type	The order type subject to the override. Possible order types are: • If ship-for-pickup is not enabled: – Pickup: customer picks up the order at a specified location – Delivery: order ships directly to the customer – Ship For Pickup: merchandise is transferred from a sourcing location to a pickup location, and the sourcing location and pickup location can both be different from the placed (originating) location The Routing Engine determines the order type for an override based on: • the order type specified in the submit order request for a new order • the order type assigned to an existing delivery or ship-for-pickup order that is rejected, so that the Routing Engine searches for another location • the fulfillment type specified for a locate items request or product availability request

Field	Description
Express Carrier	Indicates whether an order needs to use an express carrier to be subject to the override. Display-only. Possible settings are: • *Y:* – Orders that specify an express carrier are subject to the override if they match the Order Type (delivery or ship-for-pickup orders only) – If the *Default Carrier* specified at the **Preferences** screen has the express carrier selected and the order matches the Order Type, this carrier's setting applies, so that delivery or ship-for-pickup order requests that do not specify a carrier are subject to the override, as well as locate items requests with delivery or ship-for-pickup transaction types • *N:* – Orders that do not specify an express carrier are subject to the override if they match the Order Type (delivery or ship-for-pickup orders) – If the *Default Carrier* specified at the Preferences screen does not have the express carrier selected and the order matches the Order Type, this carrier's setting applies, so that delivery or ship-for-pickup order requests that do not specify a carrier are subject to the override, as well as locate items requests with delivery or ship-for-pickup order transaction types **Note:** The Express Carrier flag is always set to *N* when the Order Type is Pickup.
Order Broker Preference Override	
Inherit from Organization and Preferences	Possible settings: • Selected (default): the Order Broker settings specified at the **Preferences** screen apply to this originating system, order type, express carrier type combination, and the current settings are displayed below • Unselected: the override settings specified at this screen apply to this originating system, order type, and express carrier type combination **For more information:** For a discussion on the following fields, see the *Standard Brokering Tab* in the **Preferences** help topic. **Note:** The following fields, which control standard brokering, are displayed only if *Use Weighted Brokering Rules* is not selected at the *Preferences* screen; otherwise, the fields from the *Weighted Brokering Tab* are displayed.

Field	Description
Proximity	See *Proximity*.
On Hand Count	See *On Hand Count*.
Location Priority	See *Location Priority*.
Last Order Assigned	See *Last Order Assigned*.
Sales Velocity Rank	See *Sales Velocity Rank*.
Weighted Percentages	Displayed only for delivery or ship-for-pickup orders, and only if *Use Weighted Brokering Rules* is selected at the *Preferences* screen.
Labor Cost	See *Labor Cost*.
Gross Margin	See *Gross Margin*.
Proximity	See *Proximity*.
On Hand Count	See *On Hand Count*.
Sales Velocity	See *Sales Velocity*.
Priority	See *Priority*.
Total Weights	See *Total Weights*.

Browse Order Broker Preference Override

Purpose: Use the **Browse Order Broker Preference Override** window to review the Order Broker criteria overrides that apply to a particular order type and express carrier setting for an originating system.

Used for the Routing Engine module.

How to display this window: Click to highlight an Order Broker preference override at the *Order Broker Preference Overrides* screen.

Used for the Routing Engine module.

Note:

- Available if Use Routing Engine is selected at the *Tenant* screen.
- You can work with preference overrides only if you have completed the *Preferences* screen for the organization.
- When you create an organization, you need to first select *Save* at the **Preferences** screen in order to create the override combinations to display at this window.
- If *Use Weighted Brokering Rules* is selected at the *Preferences* screen, the *Weighted Percentages* are displayed; otherwise, the fields from the *Standard Brokering* tab at the Preferences screen are displayed.
- Only users with *Order Broker Preference Overrides* authority can display this window. See the *Role Wizard* for more information.

Pickup location preferences: When the Routing Engine receives a web service request searching for locations that could fulfill a pickup order:

- If *Use Weighted Brokering Rules* is unselected: The LocateItems response uses Standard Brokering rules from the**Preferences** screen, while the Product Availability response lists the locations in order of proximity.
- If *Use Weighted Brokering Rules* is selected: Both the LocateItems response and the Product Availability response list the locations in order of proximity.

> **Note:**
>
> Because the Standard Brokering Rules never apply to searches for pickup orders when *Use Weighted Brokering Rules* is selected, the Browse Order Broker Preferences window does not display any preference rules for a pickup order type. Although you can work with the Standard Brokering Rules at the *Edit Order Broker Preference Override* screen, these settings are never used if you use weighted brokering.

Options at this window

Option	Procedure
review the next order type, originating system, and express carrier setting combination subject to Preference overrides	Click the next icon () to display the next combination subject to **Preference** overrides.
review the previous order type, originating system, and express carrier setting subject to Preference overrides	Click the previous icon () next to display the previous subject to **Preference** overrides.
edit the current order type, originating system, and express carrier setting's Preference overrides	Select *Edit* to advance to the *Edit Order Broker Preference Override* screen.

Fields at this window

> **Note:**
>
> All fields at this window are display-only.

Field	Description
Informational fields:	
Organization	The *organization* associated with the originating system. The organization code and name are displayed, separated by a hyphen (-).

Field	Description
Originating System	The system originating the order or the product search request subject to the override. The system code and description are displayed, separated by a hyphen (-). • This is the system that originally submits the order; or, in the case of a locate items or product availability request message, this is the system submitting the request. • The Routing Engine always uses the override setting for the originating system when routing an order, even if the order has been rejected, and it is finding another fulfilling or sourcing location ("reshopping" the order).
Order Type	The order type subject to the override. Possible order types are: • If ship-for-pickup is not enabled: • Pickup: customer picks up the order at a specified location • Delivery: order ships directly to the customer • Ship For Pickup: merchandise is transferred from a sourcing location to a pickup location, and the sourcing location and pickup location can both be different from the placed (originating) location The Routing Engine determines the order type for an override based on: 1. the order type specified in the submit order request for a new order 2. the order type assigned to an existing delivery or ship-for-pickup order that is rejected, so that the Routing Engine searches for another location 3. the fulfillment type specified for a a locate items request or product availability request
Express Carrier	Indicates whether an order needs to use an express carrier to be subject to the override. Possible settings are: • *Y:* • Orders that specify an express carrier are subject to the override if they match the Order Type (delivery or ship-for-pickup orders only) • If the *Default Carrier* specified at the **Preferences** screen has the express carrier selected and the order matches the Order Type, this carrier's setting applies, so that delivery and ship-for-pickup order requests that do not specify a carrier are subject to the override, as well as locate items requests with delivery or ship-for-pickup transaction types • *N:* • Orders that do not specify an express carrier are subject to the override if they match the Order Type (delivery or ship-for-pickup orders only) • If the *Default Carrier* specified at the Preferences screen does not have the express carrier selected and the order matches the Order Type, this carrier's setting applies, so that delivery or ship-for-pickup order requests that do not specify a carrier are subject to the override, as well as locate items requests with delivery or ship-for-pickup transaction types **Note:** The Express Carrier flag is always set to *N* when the Order Type is Pickup.

Field	Description
Order Broker Preference Override	
Inherit from Organization and Preferences	Possible settings: • Selected (default): the Order Broker settings specified at the **Preferences** screen apply to this originating system, order type, express carrier type combination, and the current settings are displayed below • Unselected: the override settings specified at this screen apply to this originating system, order type, and express carrier type combination **For more information:** For a discussion on the following fields, see the *Standard Brokering Tab* in the **Preferences** help topic. • The following fields, which control standard brokering, are displayed only if *Use Weighted Brokering Rules* is not selected at the *Preferences* screen; otherwise, the *Weighted Percentages* are displayed. • If *Use Weighted Brokering Rules* is selected, both the LocateItems response and the Product Availability response list the locations in order of proximity. Because the Standard Brokering Rules never apply to searches for pickup orders when you use weighted brokering, no preference rules are displayed for a pickup order type.
Proximity	See *Proximity*.
On Hand Count	See *On Hand Count*.
Location Priority	See *Location Priority*.
Last Order Assigned	See *Last Order Assigned*.
Sales Velocity Rank	See *Sales Velocity Rank*.
Weighted Percentages	Displayed only for delivery or ship-for-pickup orders, and only if *Use Weighted Brokering Rules* is selected at the *Preferences* screen.
Labor Cost	See *Labor Cost*.
Gross Margin	See *Gross Margin*.
Proximity	See *Proximity*.
On Hand Count	See *On Hand Count*.
Sales Velocity	See *Sales Velocity*.
Priority	See *Priority*.
Total Weights	See *Total Weights*.

Locations

Purpose: Use the **Locations** screen to work with locations where you sell or stock inventory to be visible for *locate items* requests or product availability requests, or that can place or fulfill orders through the Routing Engine, or that can originate a purchase order fulfilled through Supplier Direct Fulfillment.

What is a location? A location is a place where a product is sold or stocked. A location can be a warehouse or store where you keep actual inventory, or it can also be a virtual location such as a web storefront or a vendor. Locations are defined within an *organization* both by the *system* to which they belong and their *location type*.

How are locations created? Typically, you create locations through an integration with an external system. For example, locations are created as part of the product import process; see *OCDS or Merchandising Omni Services Imports* or *Importing Locations through File Storage API*. You can also create them through the Location Update request JSON message; see the Operations Guide for more information.

> **Note:**
>
> Once you have created locations in Order Broker, you can then import them into the Store Connect module.

Location address: It is important that the location address be accurate, since the location address is used as the ship-to address for ship-for-pickup orders.

Location relationships: See *Organization, System, and Location* for an overview of the relationships among **Order Broker** elements, including locations.

Order Management System integration: Locations that correspond to Order Management System warehouses must have codes identical to the Order Management System warehouse codes.

How to display this screen: Select *Locations* from the *Home Screen* or from the *Locations Menu*.

> **Note:**
>
> Only users with *Locations* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>create a new location</td><td>
Note: Normally, you should not create locations using this method. By creating a location in Order Broker directly rather than using the process described under Importing Locations through File Storage API, you run the risk that location information will be inconsistent with that in the external system, such as Order Management System or Xstore.
Each of the fields at the top of the screen is required.

Optionally, select a different organization from the Organization drop-down box. See Data Hierarchy for more information on how locations are assigned to organizations.
Note:
You must complete the Preferences screen for an organization before you can select it.
Select a location type from the Type field. Only location types that you have set up within the selected organization are available for selection. See the Location Types screen for background.
Note:
You cannot select a location until you select an organization.
Enter a code for the location in the Location field. Location codes can be 1 to 10 positions in length, and must be unique for each organization and system; however, you can use the same location code within an organization for two or more different systems.
Enter the name of the location in the Name field. Location names can be 1 to 40 positions in length, and do not need to be the same as the name or description of the location in the integrated system, such as Order Management System or Xstore.
Select the system where the location is located from the System drop-down box. Only systems within the selected organization are available for selection.
Click New. If:

the location already exists for the organization and system, Order Broker displays an error message, clears your entries from the screen, and positions the results fields to the existing location.
you did not enter any of the required fields, Order Broker displays an error message.
your entries were accepted, you advance to the New Location screen, where you can enter additional information about the location. However, if you click Cancel after advancing to the Location screen, the location is not created.

</td></tr>
</table>

Option	Procedure
	Order Management System integration: Locations that correspond to Order Management System warehouses must have codes identical to the Order Management System warehouse codes. **Sort order:** The sort at the *Preferences* and *Probability Location* screens is in alphanumeric order within each organization. In other words, organizations are listed alphanumerically by name, as are location types within an organization, and locations within a location type. Since the sort is alphanumeric, numeric codes are listed before alphabetical codes; for example, location *123* is listed before location *ABC*.
search for a location	The *organization* associated with your *Default Shipping System* is selected by default, but no locations are displayed. Click *Search* to retrieve the first 50 locations for your organization, or use any combination of the fields at the top of the screen to restrict the search results to matching locations: 1. Optionally, select a different *organization* from the *Organization* drop-down box to restrict your results to that organization. **Note:** You can select a blank organization to remove this field from your selection criteria. 2. Select a *location type* from the Type drop-down box to restrict your results to this type. You cannot select a location type until you select an organization. **Note:** You can select a blank location type to remove this field from your selection criteria. 3. Enter a full or partial location code in the Location field to restrict your results to locations whose names start with your entry. 4. Enter a full or partial location name in the Name field to restrict your results to locations whose names contain your entry. 5. Select a *system* from the System drop-down box to restrict your results to this system. You cannot select a system until you select an organization. 6. Click *Search*. **Case:** Both the enterable fields on this screen are case-insensitive for searching; for example, an entry of `D` or `D` matches a location name of `Distribution Center`.
advance to the Location Attributes screen	Click the attributes icon ( ) next to a location. **Note:** If the *Location Attributes* screen is already open in another tab, you advance to that screen, with the location attributes for the previously-selected location displayed.

Option	Procedure
select a location for review or maintenance	Click the edit icon ( ) next to a location to advance to the *Edit Location* screen, where you can review or work with additional information about the location, such as address, telephone numbers, and store hours. **Note:** If the *Edit Location* screen is already open in another tab, you advance to that screen, where the previously-selected location is displayed.
delete a location	Select the delete icon ( ) next to a location to delete the location from Order Broker. You can delete a location only if there is not an existing record for the location of any: • Product locations. • Attributes assigned to the location, or to product locations for the location. • Store associate users with authority to log into the location. • Fulfillment zones that include the location. • Order status history for an order lines in the location, or order lines that are assigned to the location. • Orders originating in the location.

Fields at this screen

Field	Description
Search/new fields:	
Organization	See *organization*. Required to create a new location. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. **Note:** You must complete the *Preferences* screen for an organization before you can select it.
Type	See *location type*. Required to create a new location.
Location	See *location*. Required to create a new location. Case-insensitive for searching; for example, an entry of `D` or `D` matches a location code of `D123`.
Name	Location names can be 1 to 40 positions in length, and do not need to be the same as the name or description of the location in the integrated system, such as Order Management System or Xstore. Required to create a new location. Case-insensitive for searching; for example, an entry of `D` or `D` matches a location name of `Distribution Center`.
System	See *system*. Required to create a new location.
Results fields:	
Organization	See *organization*.
Type	See *location type*.
Location	See *location*. You can click the edit icon ( ) to advance to the *Edit Location* screen, where you can review or work with additional information about the location such as address, telephone numbers, and store hours.

Field	Description
Name	The descriptive name of the location.
System	See *system*.
Attributes	Select the attributes icon ( ) next to a location to advance to the *Location Attributes* screen. **Note:** If the Location Attributes screen is already open in another tab, you advance to that screen, with the location attributes for the previously-selected location displayed.
Edit	Select the edit icon ( ) to advance to the *Edit Location* screen. **Note:** If the Edit Location screen is already open in another tab, you advance to that screen, where the previously-selected location is displayed.
Delete	Select the delete icon ( ) next to a location to delete the location from Order Broker. You can delete a location only if there is not an existing record for the location of any: • Product locations. • Attributes assigned to the location, or to product locations for the location. • Store associate users with authority to log into the location. • Fulfillment zones that include the location. • Order status history for an order lines in the location, or order lines that are assigned to the location. • Orders originating in the location.

New Location

Purpose: Use the **New Location** screen to create a *location*, including the address, telephone numbers, and other related information such as the store rank and hours.

> **Note:**
>
> Typically, you create locations through integrations with external systems. For example, locations might be created as part of the product import process; see *OCDS or Merchandising Omni Services Imports* or *Importing Locations through File Storage API*.

Location relationships: See *Data Hierarchy* for an overview of the **Order Broker** organization, system, and location hierarchy. Also, see the *Locations* screen for more information on how locations are created in Order Broker.

Location address: It is important that the location address be accurate, since the location address is used as the ship-to address for ship-for-pickup orders.

How to display this screen: Enter the required information to create a new location at the *Locations* screen and click *New*.

Note:

- If you click *Cancel* after advancing to the New Location screen, the location is not created.
- You must complete the *Preferences* screen for an organization before you can create any locations for it. See *Setting Up Data for the Routing Engine Module* for an overview.
- Only users with *Locations* authority can display this screen. See the *Role Wizard* for more information.

Completing creation of a location

Enter any of the fields described below and click *Save*, or click *Cancel* to return to the *Locations* screen without creating the location.

Note:

Any changes you make at this screen can be overwritten the next time you import location information, as described in *Importing Locations through File Storage API*.

Required, optional fields: The Name is always required. All of the remaining information on this screen is optional, although the screen displays a warning message before you can create a location without a State/Province, Country, and Postal Code, because these fields are required to use the *proximity locator*. The remaining fields are optional, however:

- If you use the *proximity locator* in your organization, you should always enter a valid address, regardless of whether the location is subject to proximity locator searching (for example, a warehouse).
- Canadian postal codes should be entered with a space: for example, L5R 4H1 rather than L5R4H1.
- *locateitems response:* the name and address information for the location that is displayed in the *locate items* response is derived from your entries at this screen.
- *ADSI integration in Store Connect:* The name and address may also be submitted to ADSI when the store associate ships an item, based on the setting of the *Shipping Label Return Address* specified at the **Store Connect Preferences** screen. The return address location The return address location must include:
  - contact name and company name
  - street address line 1
  - U.S. city, state/province, and postal code
  - phone number of 10 positions, plus any formatting (for example, (508) 555-1111). The store location phone number is used if there is not a day or evening phone number for the order shipping address
- *submit order request for a pickup order:* If a submit order request for a pickup order originates from a location without an address that includes a valid postal

code, Order Broker returns an error indicating that the location does not have sufficient inventory of the requested item.

> **Note:**
>
> - If you click *Cancel* at this screen, the location is not created.
> - You need to advance to the *Preferences* screen and click *Save* to have the Routing Engine begin including the new location in locate items results and to make the location eligible for submit order assignment.
> - If you use *proximity locator*, when you create a new location with a postal code, Order Broker determines its latitude and longitude using either the *Oracle Maps Cloud Service* or the *proximity location table*, depending on your configuration, and saves this information as part of the location record. The screen displays an error message if the Geocode URL is required, but not specified at the **Tenant** screen. See *Proximity Locator Searching* for an overview.

Fields at this screen

Field	Description
Informational fields:	
Organization	The *organization* you selected at the *Locations* screen. Required. The organization code and name are displayed, separated by a hyphen (-).
Type	The *location type* you selected at the *Locations* screen. Required. The location type code and name are displayed, separated by a hyphen (-).
Location	The location code you entered at the *Locations* screen. Required. The location code only is displayed.
System	The *system* you selected at the *Locations* screen. Required. The system code and name are displayed, separated by a hyphen (-).
Location detail fields:	**Note:** Most of the fields on this screen are optional and informational only. The exceptions are the *Name* field, which is always required, and the *Country* and *Postal code*, which are required if *Use Proximity Locator* is selected for the organization at the *Preferences* screen. The name and address information for the location that is displayed in the *locate items* response is derived from your entries at this screen.
Name	Location names can be 1 to 40 positions in length, and do not need to be the same as the name or description of the location in the integrated system, such as Order Management System or Xstore. Required.
Rank	Your entry can be up to 10 positions. Informational.

Field	Description
Region	Your entry can be up to 20 positions. Informational.
Contact Name	Your entry can be up to 40 positions. Informational.
Store Hours	Your entry can be up to 60 positions. Informational.
Emails	The email address(s) must be formatted as user@host.com (or other valid suffix such as .org). Order Broker does not validate that your entry represents an existing email address. Separate multiple email addresses with a semicolon (;). Your entry can be up to 245 positions total. **New Store Connect order?** Used for the new order notification email if this is a Store Connect location and the *Send New Order Notifications* flag is selected at the **Email** tab of the Store Connect Preferences screen. See: • contents: *New Order Notification to Store Connect Location* • email setup information: *Store Connect Email Notifications Summary* • overview: *Notifying Store Connect Locations about New Orders*
Telephones	
Telephone	Your entry can be up to 20 positions.
Extension	Your entry can be up to 10 positions.
Fax	Your entry can be up to 20 positions.
Address	
Address	Your entry in each of the four fields can be up to 50 positions. Optional.
City	Your entry can be up to 35 positions. Optional.
State/Province	Your entry can be up to 3 positions. Required to use the *proximity locator*, although you can create a location without completing this field. Should be a valid ISO code.
Postal Code	The ZIP or postal code for the location. Your entry can be up to 10 positions. Required to use the *proximity locator*, although you can create a location without completing this field. • Canadian postal codes should be entered with a space: for example, L5R 4H1 rather than L5R4H1. • If a submit order request for a pickup order originates from a location without an address that includes a valid postal code, Order Broker returns an error indicating that the location does not have sufficient inventory of the requested item.
Country	Your entry can be up to 3 positions. Required to use the *proximity locator*, although you can create a location without completing this field. Should be a valid ISO code.
Attributes	
Labor Cost	Used to “shop” an order for fulfillment or sourcing as part of the weighted brokering method (see *Submit Order Request for Delivery Order (Weighted Brokering)* for background) when determining the cost to pick, pack, and ship an order. Your entry can be a maximum of 19 positions, including up to 15 positions before the decimal and 4 positions after. It can also be 0 (0.000), but cannot be a negative number, and should not include a currency symbol. Optional. You can also update the labor cost through the *Location Bulk Updates* wizard.

Field	Description
Gift Wrap	Select this flag to indicate that the location supports gift wrap; otherwise, leave it unselected. It defaults to unselected. **Used when?** If the *Use Attribute Rules* flag is selected for the organization at the **Preferences** screen, locations are filtered based on this setting when the LocateItems request, SubmitOrder request, or ProductAvailability request indicates that the item requires gift wrap, or if the order line is rejected and reshopped. For a ship-for-pickup order, it is the pickup location that needs to support gift wrapping rather than the sourcing location. See *Enable Ship-For-Pickup?* for background. **Note:** This field is not updated through the location import, but it is updated through the LocationUpdate request message.
Days Open	The Auto Cancel Unclaimed Pickup Orders job uses the Days Open settings to determine when to cancel an unclaimed pickup or ship-for-pickup order. Only days that are selected here are included in the calculation. See *Auto-Cancel Unclaimed Orders* for a discussion and setup information.
Days Open for Auto-Cancel	Use these fields to indicate which days of the week should be included to determine when a pickup or ship-for-pickup order is eligible for automatic cancellation. If a day is not selected, it is not included in the calculation. All days of the week are available for selection. *Updating these fields:* All days of the week are selected by default when you create a new location through this screen, the LocationUpdate request message, or the *Importing Locations through File Storage API* process. You can change the settings at the *Edit Location* screen, or through the *Location Bulk Updates* wizard. If you change a location's Days Open for Auto Cancel settings, this does not affect the Pickup By Date that has already been assigned to any order lines for the location. Updating an existing location through the *Importing Locations through File Storage API* process does not update the Days Open for Auto-Cancel.

Edit Location

Purpose: Use the **Edit Location** screen to work with a *location*, including the address, telephone numbers, and other related information such as the store rank and hours.

Location relationships: See *Data Hierarchy* for an overview of the **Order Broker** organization, system, and location hierarchy. Also, see the *Locations* screen for more information on how locations are created in Order Broker.

Location address: It is important that the location address be accurate, since the location address is used as the ship-to address for ship-for-pickup orders.

Updated how? The location information displayed at this screen can be updated by:

- a periodic refresh from an external system (such as product import processing from Order Management System, or an import from *OCDS or Merchandising Omni Services*); see *Importing Locations through File Storage API* or *OCDS or Merchandising Omni Services Imports*
- entry at this screen

How to display this screen: Click the edit icon ( ) for a location at the *Locations* screen.

> **Note:**
>
> - Only users with *Locations* authority can display this screen. See the *Role Wizard* for more information.
> - If the **Edit Location** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previously-selected location displayed.
> - When you create or update locations through an import, entries you make at this screen may be overwritten the next time the import runs.

Updating a location

Update any of the fields described below and click *Save*, or click *Cancel* to return to the *Locations* screen without making any changes.

> **Note:**
>
> - Any changes you make at this screen can be overwritten the next time you import location information, as described in *Importing Locations through File Storage API*.
> - If you use *proximity locator*, when you change the address for a location, Order Broker determines its new latitude and longitude using either the *Oracle Maps Cloud Service* or the *proximity location table*, depending on your configuration, and updates this information for the location record.

Required, optional fields: The Name is always required. All of the remaining information on this screen is optional, although the screen displays a warning message before you can create a location without a State/Province, Country, and Postal Code, because these fields are required to use the *proximity locator*. The remaining fields are optional, however:

- If you use the *proximity locator* in your organization, you should always enter a valid address, regardless of whether the location is subject to proximity locator searching (for example, a warehouse).
- Canadian postal codes should be entered with a space: for example, L5R 4H1 rather than L5R4H1.
- *locateitems response:* the name and address information for the location that is displayed in the *locate items* response is derived from your entries at this screen.
- *ADSI integration in Store Connect:* The name and address may also be submitted to ADSI when the store associate ships an item, based on the setting of the *Shipping Label Return Address* specified at the **Store Connect Preferences** screen. The return address location must include:
  - contact name and company name

- street address line 1
- U.S. city, state/province, and postal code
- phone number of 10 positions, plus any formatting (for example, (508) 555-1111). The store location phone number is used if there is not a day or evening phone number for the order shipping address

- *submit order request for a pickup order:* If a submit order request for a pickup order originates from a location without an address that includes a valid postal code, Order Broker returns an error indicating that the location does not have sufficient inventory of the requested item.

Fields at this screen

Field	Description
Informational fields:	
Organization	See *organization*. The organization code and name are displayed, separated by a hyphen (-).
Type	See *location type*. The location type code and name are displayed, separated by a hyphen (-).
Location	See *location*. The location code only is displayed.
System	See *system*. The system code and name are displayed, separated by a hyphen (-).
Location detail fields:	**Note:** Most of the fields on this screen are optional and informational only. The exceptions are the *Name* field, which is always required, and the *Country* and *Postal code*, which are required if *Use Proximity Locator* is selected for the organization at the *Preferences* screen. The name and address information for the location that is included in the *locate items* response is derived from your entries at this screen.
Name	Location names can be 1 to 40 positions in length, and do not need to be the same as the name or description of the location in the integrated system, such as Order Management System or Xstore. Required.
Rank	Your entry can be up to 10 positions. Informational.
Region	Your entry can be up to 20 positions. Informational.
Contact Name	Your entry can be up to 40 positions. Informational.
Store Hours	Your entry can be up to 60 positions. Informational.

Field	Description
Emails	The email address must be formatted as user@host.com (or other valid suffix such as .org). Order Broker does not validate that your entry represents an existing email address. Separate multiple email addresses with a semicolon (;). Your entry can be up to 245 positions total. **New Store Connect order?** Used for the new order notification email if this is a Store Connect location and the *Send New Order Notifications* flag is selected at the **Email** tab of the Store Connect Preferences screen. See: • contents: *New Order Notification to Store Connect Location* • email setup information: *Store Connect Email Notifications Summary* **Turn off email notifications?** To turn off email notifications to a store location, delete the email address(es) specified here.
Telephones	
Telephone	Your entry can be up to 20 positions.
Extension	Your entry can be up to 10 positions.
Fax	Your entry can be up to 20 positions.
Address	
Address	Your entry in each of the four fields can be up to 50 positions.
City	Your entry can be up to 35 positions.
State/Province	Your entry can be up to 3 positions. Required to use the *proximity locator*, although you can create a location without completing this field. Should be a valid ISO code.
Postal Code	The ZIP or postal code for the location. Your entry can be up to 10 positions. Required to use the *proximity locator*, although you can create a location without completing this field. **Note:** • Canadian postal codes should be entered with a space: for example, L5R 4H1 rather than L5R4H1. • If a submit order request for a pickup order originates from a location without an address that includes a valid postal code, Order Broker returns an error indicating that the location does not have sufficient inventory of the requested item.
Country	Your entry can be up to 3 positions. Required to use the *proximity locator*, although you can create a location without completing this field. Should be a valid ISO code.
Attributes	

Field	Description
Labor Cost	Used to "shop" an order for fulfillment or sourcing as part of the weighted brokering method (see *Submit Order Request for Delivery Order (Weighted Brokering)* for background) when determining the cost to pick, pack, and ship an order. Your entry can be a maximum of 19 positions, including up to 15 positions before the decimal and 4 positions after. It can also be 0 (0.000), but cannot be a negative number, and should not include a currency symbol. Optional. You can also update the labor cost through the *Location Bulk Updates* wizard.
Gift Wrap	Select this flag to indicate that the location supports gift wrap; otherwise, leave it unselected. It defaults to unselected. **Used when?** If the *Use Attribute Rules* flag is selected for the organization at the **Preferences** screen, locations are filtered based on this setting when the LocateItems request, SubmitOrder request, or ProductAvailability request indicates that the item requires gift wrap, or if the order line is rejected and reshopped. For a ship-for-pickup order, it is the pickup location that needs to support gift wrapping rather than the sourcing location. See *Enable Ship-For-Pickup?* for background. **Note:** This field is not updated through the location import, but it is updated through the LocationUpdate request message.
Geocode	If you use *proximity locator* and the location has a postal code, Order Broker determines a location's latitude and longitude using either the *Oracle Maps Cloud Service* or the *proximity location table*, depending on your configuration, and saves this information as part of the location record.
Latitude	The location's latitude. Set automatically when you create or update a location if you use *proximity locator*. See *Proximity Locator Searching* for an overview. Display-only.
Longitude	The location's latitude. Set automatically when you create or update a location if you use *proximity locator*. See *Proximity Locator Searching* for an overview. Display-only.
Days Open	The Auto Cancel Unclaimed Pickup Orders job uses the Days Open settings to determine when to cancel an unclaimed pickup or ship-for-pickup order. Only days that are selected here are included in the calculation. See *Auto-Cancel Unclaimed Orders* for a discussion and setup information.

Field	Description
Days Open for Auto-Cancel	Use these fields to indicate which days of the week should be included to determine when a pickup or ship-for-pickup order is eligible for automatic cancellation. If a day is not selected, it is not included in the calculation. All days of the week are available for selection. *Updating these fields:* All days of the week are selected by default when you create a new location through the *New Location* screen, the LocationUpdate request message, or the *Importing Locations through File Storage API* process. You can change the settings at this screen, or through the *Location Bulk Updates* wizard. If you change a location's Days Open for Auto Cancel settings, this does not affect the Pickup By Date that has already been assigned to any order lines for the location. Updating an existing location through the *Importing Locations through File Storage API* process does not update the Days Open for Auto-Cancel.

Location Attributes

Purpose: Use the **Location Attributes** screen to review or work with attributes that are applied to a location.

Used for the Routing Engine module.

For more information: See *Using Attribute Rules for Delivery and Pickup Orders* and *Using Attribute Rules for Ship-for-Pickup Orders* for background and see *Attribute Definitions* for information on creating and working with attribute definitions.

How to display this screen: Select the attribute icon () for a product at the *Locations* screen.

Options at this screen

Option	Procedure
apply a new attribute to the location	Click *New* to open the *New Location Attribute* window.
search for a location attribute	Optionally, enter a full or partial attribute code in the *Attribute Code* field to restrict your results to attributes whose codes start with your entry. Optionally, select an *Location Use* to restrict your results to attributes whose Location Uses match your entry. Optionally, select a *Data Type* to restrict your results to attributes whose Data Types match your entry. Click *Search*.
select a location attribute for maintenance and review	Click the edit icon ( ) to open the *Edit Location Attribute* window.
delete an attribute	Click the delete icon () next to a location attribute to delete it.

Fields at this screen

Field	Description
Informational fields:	
Organization	See *organization*. The organization code is separated from the organization description by a hyphen (-).
Location	See *location*. The location you selected at the *Locations* screen. The location code is separated from the location name by a hyphen (-).
Search fields:	
Attribute Code	The Code identifying an attribute you can apply to locations. Optionally, enter a full or partial attribute code and click *Search* to display location attributes that start with your entry.
Location Use	Indicates whether the attribute applies to the location when it is the *Originating*, *Pickup*, or *Sourcing* location for an order. Optionally, select a Location Use and click *Search* to display location attributes that match your selection.
Data Type	Indicates the type of data that can be defined through the attribute. Available data types are: • *Boolean:* Indicates whether a condition is true for the location; for example, use a Boolean attribute to identify each location that supports oversized items. • *List:* Used to define a list of valid values that can be assigned to a location; for example, this might be a list of brands that the location supports. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions. Optionally, select a Data Type and click *Search* to display location attributes that match your selection.
Results fields:	
Attribute Code	The Code identifying an attribute applied to the location.
Description	The description of the attribute. Can be up to 100 positions. Truncated if it exceeds the allotted space.
Value	The value of the location attribute. The value can be: • text, if the Data Type of the attribute is *Text* or *List* • numeric, if the Data Type of the attribute is *Text*, *List*, or *Number* • true, if the Data Type of the attribute is *Boolean* A text or list value can be up to 50 positions. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. Truncated if it exceeds the allotted space.
Location Use	Indicates whether the attribute applies to the location if it is the *Originating*, *Pickup*, or *Sourcing* location for an order.

Field	Description
Data Type	Indicates the type of data that can be defined through the attribute. Available data types are: • *Boolean:* Indicates whether a condition is true for the location; for example, use a Boolean attribute to identify each location that supports oversized items. • *List:* Used to define a list of valid values that can be assigned to a location; for example, this might be a list of brands that the location supports. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions.
Edit	Select the edit icon ( ) next to a location attribute to open the *Edit Product Attribute* window.
Delete	Select the delete icon ( ) next to a location attribute to delete the attribute from the location.

New Location Attribute

Purpose: Use the **New Location Attribute** window to apply an attribute to a location.

Used for the Routing Engine module.

For more information: See *Using Attribute Rules for Delivery and Pickup Orders* and *Using Attribute Rules for Ship-for-Pickup Orders* for background.

How to open this window: Click *New* at the *Location Attributes* screen.

Note:

Available if Use Routing Engine is selected at the *Tenant* screen.

Fields at this window: Complete the fields described below and click *Save*, or click *Cancel* to return to the *Location Attributes* screen without creating the location attribute.

Field	Description
Location	See *location*. The location you selected at the *Locations* screen. The location code is separated from the location name by a hyphen (-). Display-only.

Field	Description
Location Use	Select whether the attribute applies to the location when it is the *Originating*, *Pickup*, or *Sourcing* location for an order. Required. In the case of a ship-for-pickup order, the *Ship For Pickup Matching Type* selected for the attribute definition must also indicate to use this attribute when filtering locations; for example, the Ship For Pickup Match Type must be set to *Sourcing* or *Both* in order to use a location attribute whose Location Use is set to *Sourcing* to filter orders. However, this restriction does not apply to delivery or pickup orders.
Attribute Code	After selecting the Location Use, select the Code identifying an attribute you can apply to a location. All attribute definitions that could be applied to the selected location are available for selection. Attributes are available for selection if: • they were created with an Attribute Type of *Location* or *Product and Location*, and • if the Location Use is: • *Sourcing or Pickup:* Attributes are available for selection as long as they have not already been applied to the selected location with the same Location Use, unless the Allow Multiple flag was selected. For example, you might select the Allow Multiple flag for a list attribute identifying brands, and apply multiple brands to a location for sourcing or pickup. • *Originating:* Attributes are not available for selection if they have already been applied to the selected location, regardless of whether the Allow Multiple flag is selected for the attribute. If the attribute has not already been applied using the same Location Use, then it can be applied again to the location. Once you select an Attribute Code, the Description and Data Type are displayed above the Value field. The Attribute Code is not available for selection until after you select the Location Use. Required.
Description	The description of the selected attribute. Displayed after you select the Attribute Code. Display-only.
Data Type	Indicates the type of data that can be defined through the selected attribute. Possible data types are: • *Boolean:* Indicates whether a condition is true for the location; for example, set to true if the location supports engraving. • *List:* Used to define a list of valid values that can be assigned to a location; for example, this might be a list of brands that the location can support for sourcing or pickup. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions. Displayed after you select the Attribute Code. Display-only.

Field	Description
Value	Use this field to enter or select the value for the location attribute. If the Data Type is: • *Boolean:* Automatically selected and cannot be changed. • *List:* Select the Value from the displayed options defined for the attribute. Only Values for the attribute that are not already assigned to the location are available for selection. • *Number:* Enter a numeric value. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Enter a numeric or text value. Can be up to 50 positions. Required, except that a Boolean defaults to selected and is display-only.

Edit Location Attribute

Purpose: Use the **Edit Location Attribute** window to change the value for a location attribute.

Used for the Routing Engine module.

For more information: See *Using Attribute Rules for Delivery and Pickup Orders* and *Using Attribute Rules for Ship-for-Pickup Orders* for background.

How to open this window: Click the edit icon ( ) at the *Location Attributes* screen.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen.

Fields at this window:

> **Note:**
>
> Boolean location attributes cannot be edited. You can delete a Boolean attribute if it should not apply to the location.

Field	Description
Location	See *location*. The location you selected at the *Locations* screen. The location code is separated from the location name by a hyphen (-). Display-only.

Field	Description
Location Use	Indicates whether the attribute applies to the location when it is the *Originating*, *Pickup*, or *Sourcing* location for an order. Display-only. In the case of a ship-for-pickup order, the *Ship For Pickup Matching Type* selected for the attribute definition must also indicate to use this attribute when filtering locations; for example, the Ship For Pickup Match Type must be set to *Sourcing* or *Both* in order to use a location attribute whose Location Use is set to *Sourcing* to filter orders. However, this restriction does not apply to delivery or pickup orders.
Attribute Code	The Code identifying the attribute applied to a location. Display-only.
Description	The description of the selected attribute. Display-only.
Data Type	Indicates the type of data that can be defined through the selected attribute. Possible data types are: • *Boolean:* Indicates whether a condition is true for the location; for example, set to true if the location supports engraving. • *List:* Used to define a list of valid values that can be assigned to a location; for example, this might be a list of brands that the location can support for sourcing or pickup. Each value can be up to 50 positions. • *Number:* Indicates that the value defined through the attribute must be numeric. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Indicates that the value defined through the attribute is text. Values can be up to 50 positions. Display-only.
Value	Use this field to enter or select the value for the location attribute. If the Data Type is: • *Boolean:* Automatically selected and cannot be changed. • *List:* Select the Value from the displayed options defined for the attribute. Only Values for the attribute that are not already assigned to the location are available for selection. • *Number:* Enter a numeric value. Numbers can be up to 25 positions, including commas, decimal points, or minus signs. • *Text:* Enter a numeric or text value. Can be up to 50 positions. Required, except that a Boolean defaults to selected and is display-only.

Location Bulk Updates

Purpose: Use the **Location Bulk Updates** wizard to set the Labor Cost, the Days Open for Auto Cancel, or both, for one or more locations within a system. You can select the locations to update based on:

- Location Type
- Country
- State or Province
- Region

- Rank

The *Review* step of the wizard indicates the total number of locations eligible for update. The eligible locations are not listed, and no report is produced when you submit the update, but the locations are updated automatically.

About Labor Cost: The Labor Cost for a location is used to **"**shop**"** an order for fulfillment or sourcing as part of the *LocateItems Sequence and Splitting Examples (Standard Brokering)* method when determining the cost to pick, pack, and ship an order.

About Days Open for Auto Cancel: A location's Days Open for Auto Cancel settings are used to indicate which days of the week to exclude when calculating the Pickup By Date for a pickup or ship-for-pickup order line assigned to the location. Once the Pickup By Date has passed, the order line is eligible to be canceled by the Auto Cancel Unclaimed Pickup Orders job. See *Auto-Cancel Unclaimed Orders* for a discussion.

> **Note:**
>
> If you change a location's Days Open for Auto Cancel settings, this does not affect the Pickup By Date that has already been assigned to any order lines for the location.

How to display this screen: Select *Location Bulk Updates* from the *Locations Menu*.

> **Note:**
>
> Only users with *Location Bulk Updates* authority can display this screen. See the *Role Wizard* for more information.

Specify Location Bulk Update Rule

Purpose: Use this first step in the Location Bulk Update wizard to specify the organization and system where the updates should take place. This step opens when you select *Location Bulk Updates* from the *Locations Menu*.

Fields at this screen

Field	Description
Organization	The *organization* where the bulk updates to the Labor Cost should take place. The organization associated with the Default Shipping System defined for your user profile defaults, but you can override it. Required.
System	The *system* where the bulk updates to the Labor Cost should take place. Only systems associated with the selected Organization are available for selection. Required.

Completing this step:

1. Optionally, select a different Organization for the bulk location updates.
2. Select the System where the updates should take place.

Click *Next* to continue to the *Define Conditions* step, or click *Cancel* to exit the Location Bulk Updates wizard without saving your entries.

Define Conditions

Purpose: Use this second step in the Location Bulk Updates wizard to specify the criteria to use when determining which locations to update.

Adding one or more: Select one or more values from the displayed fields and then select *Add*. The criteria are added to the *Conditions* area at the top of the screen. At least one criterion is required.

Examples:

- Select a *Location Type* and select *Add*, or
- Select a *Country* and *State / Province* and select *Add*, or
- Select a *Location Type*, *Region*, and *Rank*, and select *Add*

If you select multiple criteria, they are added automatically as *And* criteria, indicating that all selected criteria must be true for the location to be updated.

Adding additional criteria:

- Select either:
  - *And*, indicating that all the existing criteria plus the new criteria you are adding must be true for the location to be updated, or
  - *Or*, indicating to update the location if either of the two sets of criteria are true
- Select one or more value from the displayed fields and select *Add*. The criteria are added to the Conditions area at the top of the screen.

Examples:

- Location Type = POS *And* Region = 12: Only locations whose location type is POS and are in region 12 are eligible for update
- Location Type = POS *Or* Region = 12: Locations are eligible for update if their location type is POS or their region is 12

> **Note:**
>
> You can select just one country and state combination at a time.

Removing a criterion: Highlight the criterion in the *Conditions* area at the top of the screen and select *Delete*.

Resetting criteria: To clear the currently selected fields, select *Reset*.

Completing this step: Select:

- *Next* to continue to the *Then* step.
- *Previous* to return to the *Define Conditions* step.
- *Cancel* to exit the Bulk Location Update wizard and discard your entries or changes.

Fields at this step

Field	Description
And / Or	Select: • *And* to have both the new criteria you add, and the existing criteria displayed in the *Conditions* area at the top of the screen, apply when selecting locations eligible for update • *Or* to have either the new criteria you add, or the existing criteria displayed in the *Conditions* area at the top of the screen, apply when selecting locations eligible for update These options are displayed only after you have added at least one set of criteria as conditions for update. In this case, one option is required.
At least one of the following criteria is required.	
Location Type	The *location type* that is eligible for the update.
Country	The country where eligible locations are located.
State / Province	The state, province, or territory where eligible locations are located. You can select a state, province, or territory only if you first select a country that has a defined list of states, provinces, or territories.
Region	The region assigned to eligible locations. The region is a user-defined code. Case-insensitive; a region of New England is a match for a region of NEW ENGLAND.
Rank	The rank assigned to eligible locations. The rank is a user-defined code. Case-sensitive; a rank of ABC is not a match for a rank of abc.

Then

Purpose: Use this step to define the Labor Cost, Days Open for Auto-Cancel, or both to apply to all eligible locations.

How to display: You advance to this step by clicking *Next* at the *Define Conditions* step.

About Labor Cost: The Labor Cost for a location is used to **"**shop**"** an order for fulfillment or sourcing as part of the *LocateItems Sequence and Splitting Examples (Standard Brokering)* method when determining the cost to pick, pack, and ship an order. Your entry can be up to 19 positions, including 15 positions before the decimal and 4 positions after. It can also be 0, but cannot be a negative number, and should not include a currency symbol.

Select the Select to Update flag to make the labor cost field enterable, and then enter a labor cost to update the locations.

About Days Open for Auto Cancel: A location's Days Open for Auto Cancel settings are used to indicate which days of the week to exclude when calculating the Pickup By Date for a pickup or ship-for-pickup order line assigned to the location. Once the Pickup By Date has passed, the order line is eligible to be canceled by the Auto Cancel Unclaimed Pickup Orders job. See *Auto-Cancel Unclaimed Orders* for a discussion.

Select the Select to Update flag to make the days of the week flags selectable, and then clear (unselect) any days that should not be counted as open for calculating the Pickup By Date.

> **Note:**
>
> The days of the week fields do not look different when you change the Select to Update flag, but are selectable after the change to that flag.

Completing this step: Select:

- *Next* to continue to the *Review Rule* step.
- Previous to return to the *Define Conditions* step.
- *Cancel* to exit the Bulk Location Update wizard and discard your entries or changes.

Review Rule

Purpose: Use this step to review the Location Bulk Update criteria; the Labor Cost, Days Open for Auto-Cancel, or both to apply; the number of locations to be updated; and to accept or reject your entries or changes.

How to display: You advance to this step by clicking *Next* at the *Then* step.

Information displayed here includes:

- the organization and system selected at the *Specify Location Bulk Update Rule* step
- the Records to Update, indicating the number of locations that meet the criteria defined at the *Specify Location Bulk Update Rule* step and the *Define Conditions* step. This number of locations will be updated with the Labor Cost specified at the *Then* step if you select *Update*. If there are no locations that meet the criteria, the number *0* is highlighted in red
- the conditions specified at the *Define Conditions* step
- the Labor Cost specified at the *Then* step
- the Days Open for Auto-Cancel selected at the *Then* step

Completing this step: Select *Update* to accept the criteria and Labor Cost, Days Open for Auto-Cancel, or both and update all eligible locations, or click *Cancel* to close the screen without submitting the update. You can also select *Previous* to return to the *Then* step.

Fulfillment Zones

Purpose: Use the **Fulfillment Zones** screen to review or work with zones you use to restrict availability searches and delivery or ship-for-pickup order assignment by geographical area.

Example: To expedite shipping and save on freight, you prefer to use the distribution center in Hartford, Connecticut to ship orders to customers in the New England states, even if a location in California has a greater quantity available.

Used for the Routing Engine module.

For more information: See *Using Zones for Fulfillment* for an overview, and see the *Fulfillment Zone Wizard* for more information on setting up and troubleshooting zones.

Zone List Report: You can use the *Zone List Report* to review the zones where locations are assigned as either primary or alternate fulfilling locations. See that report for more information.

How to display this screen: Select *Fulfillment Zones* from the *Home Screen* or from the *Locations Menu*.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Fulfillment Zones* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>create a new fulfillment zone</td><td>None of the fields at the top of the screen are required, although the organization defaults.
1. Optionally, select a different organization from the Organization drop-down box. You can also select an organization at the Specify Zone Name step in the Fulfillment Zone Wizard. See Data Hierarchy for more information on how locations are assigned to organizations.
Note:
You must complete the Preferences screen for an organization before you can select it.
2. Optionally, enter a Zone Name. If you don’t enter a Zone Name here, you can enter it at the Specify Zone Name step in the Fulfillment Zone Wizard.
3. The name can include special characters and spaces and must be unique in Order Broker, not just within the organization.
4. If the name is a duplicate of an existing zone, this error is flagged when you click Next at the Specify Zone Name step in the Fulfillment Zone Wizard.
5. Click New to advance to the Specify Zone Name step in the Fulfillment Zone Wizard. See the Fulfillment Zone Wizard for complete instructions.</td></tr>
</table>

Option	Procedure
search for a fulfillment zone	The *organization* associated with your *Default Shipping System* is selected by default, and the first 50 zones associated with this organization are displayed. 1. Optionally, select a different *organization* from the Organization drop-down box to restrict your results to that organization. **Note:** You can select a blank organization to remove this field from your selection criteria. 2. Enter a full or partial zone name in the Zone Name field to restrict your results to zones whose names start with your entry. 3. Click *Search*. **Case:** The Zone Name is case-sensitive for searching; for example, an entry of `n` does not match a zone name of `New England`.
activate or deactivate a zone	The inactive icon ( ) indicates that the Routing Engine should not currently use the zone to select locations for delivery or ship-for-pickup orders; otherwise, the active icon ( ) indicates that the zone is currently in use. To switch between the settings, click the icon that is currently displayed. **Note:** The Routing Engine does not use a zone unless it is flagged as active and the *Use Zone Fulfillment* flag at the **Preferences** screen is selected.
select a zone for maintenance and review	Click the edit icon ( ) to advance to the *Specify Zone Name* step in the *Fulfillment Zone Wizard*, where you can update the zone. **Note:** If the *Fulfillment Zone Wizard* is already open in another tab, you advance to that screen, where the previously-selected zone is displayed.
delete a zone	Select the delete icon ( ) next to a zone to delete the zone from Order Broker. You can delete a zone regardless of whether it is currently active.

Option	Procedure
review a zone	Click a zone to open the *Browse Fulfillment Zones* window. This window displays the geographical areas included in the zone, and the zone's primary and alternate shipping locations.

Fields at this screen

Field	Description
Search/new fields:	
Organization	The *organization* where a zone applies to location assignment. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.
Zone Name	The Name of a zone. Zone names can be 1 to 40 positions in length and must be unique in Order Broker, not just within the *organization*. The name can include special characters and spaces. Case-sensitive for searching; for example, an entry of `n` does not match a zone name of `New England`.
Results fields:	
Organization	The *organization* where a zone applies.
Zone Name	The Name of a zone. Zone names can be 1 to 40 positions in length and must be unique in Order Broker, not just within the *organization*. The name can include special characters and spaces.
Active	The inactive icon ( ) indicates that the Routing Engine should not currently use the zone to select locations for delivery or ship-for-pickup orders; otherwise, the active icon ( ) indicates that zone is currently in use. To switch between the settings, click the icon that is currently displayed. **Note:** The Routing Engine does not use a zone unless it is flagged as active and the *Use Zone Fulfillment* flag at the **Preferences** screen is selected.
Edit	Select the edit icon ( ) next to a zone to advance to the *Fulfillment Zone Wizard*. **Note:** If the *Fulfillment Zone Wizard* is already open in another tab, you advance to that screen, with the previously-selected zone displayed.

Field	Description
Delete	Select the delete icon ( ) next to a zone to delete the zone from Order Broker. You can delete a zone regardless of whether it is currently active.

Fulfillment Zone Wizard

Purpose: Use the **Fulfillment Zone Wizard** to create or edit zones you can use to restrict locate item searches and fulfillment or sourcing assignment to particular store or warehouse locations based on the order's shipping or pickup address.

Used for the Routing Engine module.

Steps to creating a zone:

1. *Specify Zone Name*: specify the name for a zone, the organization where it applies, and optionally flag it as active.
2. *Zone includes Shipping Addresses in*: specify the geographical areas included in the zone.
3. *Define locations*: specify the locations that are eligible to fulfill orders in the zone. Optionally, you can define one or more secondary locations to use if an order cannot be fulfilled by the primary location(s).
4. *Review Zone*: review the zone before you accept your entries or changes.

When does the Routing Engine start using a zone? The Routing Engine does not restrict orders or locate items searches to a zone unless:

1. the *Use Zone Fulfillment* flag at the **Preferences** screen is selected, and
2. the zone is flagged as *Active*

For more information: See *Using Zones for Fulfillment* for an overview.

How to display:

- *creating a zone:* click *New* at the *Fulfillment Zones* screen
- *changing or reviewing a zone:*
- click the edit icon ( ) next to a zone at the *Fulfillment Zones* screen, or
- click *Edit* at the *Browse Fulfillment Zones* window

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Fulfillment Zones* authority can display this screen. See the *Role Wizard* for more information.

In this topic: Steps in the Fulfillment Zone Wizard:

1. *Specify Zone Name*
2. *Zone includes Shipping Addresses in*

3. *Define locations*
4. *Review Zone*
5. *Troubleshooting Zone Fulfillment*

Specify Zone Name

Purpose: Use this first step in the Fulfillment Zone Wizard to specify the Name of the zone, indicate whether the zone is currently Active, and optionally to select a different organization.

How to display:

- *creating a zone:* click *New* at the *Fulfillment Zones* screen
- *changing a zone:*
- click the edit icon ( ) next to a zone at the *Fulfillment Zones* screen, or
- click *Edit* at the *Browse Fulfillment Zones* window

Fields at this screen

Field	Description
Organization	The *organization* where the zone controls location selection. Only orders associated with this organization are subject to the zone fulfillment restrictions. Required. The organization from the *Fulfillment Zones* screen defaults here, but you can override this default when you are creating a new zone. You cannot change the organization for an existing zone. *Controls displayed locations:* When you advance to the *Zone includes Shipping Addresses in* step, only locations associated with this organization are available for selection.
Zone Name	The name of a zone. Zone names can be 1 to 40 positions in length and must be unique in Order Broker, not just within the *organization*. The name can include special characters and spaces.
Active	Indicates whether the Routing Engine should start using the zone fulfillment restrictions immediately after you complete the wizard. Defaults to unselected. You can also change the setting of this flag at the *Fulfillment Zones* screen.

> **Note:**
>
> The Routing Engine does not use zone fulfillment restrictions unless the Use Zone Fulfillment flag at the **Preferences** screen is selected, even if the zone is flagged as *Active*.

Completing this step:

- Optionally, select a different *organization* from the *Organization* drop-down box to indicate the organization where the zone restrictions should apply. The organization defaults from the *Fulfillment Zones* screen. The organization controls the locations available for selection when you set up the zone.

> **Note:**
>
> This option is available only when you are creating a zone.

- Enter or change the *Zone Name*. Names can be 1 to 40 positions long and must be unique in Order Broker, not just within the *organization*. If you entered a name at the *Fulfillment Zones* screen, it defaults here. The name can include special characters and spaces.
- Optionally, select the *Active* flag to have the zone become active as soon as you complete the Fulfillment Zone Wizard. The flag is unselected by default. You can also change the setting later at the *Fulfillment Zones* screen.

Click *Next* to continue to the *Zone includes Shipping Addresses in* step, or click *Cancel* to exit the Fulfillment Zone Wizard without saving your entries.

Zone includes Shipping Addresses in

Purpose: Use this second step in the Fulfillment Zone Wizard to specify the geographical areas to include in the zone. The Routing Engine uses the zone to select fulfilling or sourcing locations if the shipping address on a delivery or ship-for-pickup order, locate items request, or product availability request falls within the geographical areas you specify here.

Rules for Selecting Geographical Areas for the Zone

Options for geographical area selection: You can set up a zone to include shipping addresses in:

- one or more ranges of three-position zip code prefixes (SCFs) within the United States, or
- one or more states, provinces, or territories within a country, or a combination of states, provinces, or territories in multiple countries, or
- one or more countries

Combining options: A zone can include more than one of the above options as long as the countries are not the same so that the areas do not overlap with another active zone.

Example: A zone might include shipping addresses in:

- a range of zip code prefixes (SCFs) in the United States, plus one or more provinces in Canada
- one or more provinces in Canada, plus Greenland (entire country)
- a range of zip code prefixes in the United States, plus Canada (entire country)

Invalid combinations: To avoid an overlap, a single zone cannot include different types of options for the same country, such as:

- the entire United States plus a particular state or zip code prefix range
- a particular state in the United States plus a zip code prefix range
- Canada plus a particular province of Canada

Multiple active zones cannot specify the same option: You cannot set up more than one active zone within an *organization* that specifies the same geographical option. For example, you cannot set up two active zones in the same organization that both specify Massachusetts. Also, you cannot set up two active zones in the same organization that specify overlapping zip code prefix ranges. However, the same zone restrictions can exist within any number of inactive zones.

Hierarchy for zone selection: You can set up different zones that include the same geographical areas, but at different levels; for example, you might have a zone that includes Massachusetts, and another zone that includes a zip code prefix range of 021 through 024, and another zone that specifies the United States. When determining which zone applies, the Routing Engine uses the following hierarchy:

1. Use the zone that matches the shipping address based on zip code prefix range; otherwise,
2. Use the zone that matches the shipping address based on state, province, or territory; otherwise,
3. Use the zone that matches the shipping address based on country; otherwise,
4. Do not restrict location assignment by zone; just use the rules set up at the *Preferences* screen.

> **Note:**
>
> Using fulfillment zones for countries other than the United States and Canada is supported only if the Use Proximity Locator preference is unselected for the organization.

Fields at this screen

Field	Description
Selected geographical locations (fields at the top of the screen)	
Country	The country included in the zone.
State / Province	A state, province, or territory of the country that is included in the zone.
Zip Code Prefix Range	The beginning and ending three-position zip code prefixes to include in the zone. Specifying a zip code prefix range is available for U.S. addresses only.
Geographical selection fields (fields at the center of the screen)	

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Country</td><td>Select a country to include in the zone. I

You can select multiple countries. For example, you can select both the United States and Canada.

The countries are in alphabetical order.

To select an entire country: Select the country from the dropdown list and click Add.

To make the State / Province field active: Select a country, such as Canada, that has a defined list of states, provinces, or territories.

To make the Zip Code Prefix From and Zip Code Prefix To fields enterable: Select the United States.

Restrictions:
You cannot select a country if the zone already includes a state, province, or territory, or a zip code prefix range in that country.
You cannot select a country that is already assigned to another zone in the organization, even if the other zone is inactive.
Note:

Using fulfillment zones for countries other than the United States and Canada is supported only if the Use Proximity Locator preference is unselected for the organization.</td></tr>
</table>

Field	Description
State / Province	Optionally, select a state, province, or territory to include in the zone. This option is available only if there is a defined list of states, provinces, or territories for the selected Country. States, provinces, and territories are in alphabetical order. Leave this field unselected if: • the zone includes the entire country, or • the zone includes a zip code prefix range in the United States You can select multiple states, provinces, or territories in one or more countries. For example, you can select: • both the United States /Maine and Canada/Ontario, or • both the United States/New York and the United States/New Jersey **Note:** You do not specify a state when adding a zip code prefix range to a zone; you should specify the United States and the zip code range only. *To select a state, province, or territory:* • Select a country that supports states or provinces, such as Canada, from the Country dropdown list. • The State/ Province list becomes active. Select the state, province, or territory from the dropdown list. • Click *Add*. *Restrictions:* • You cannot select a state, province, or territory if the zone already includes the country, or if the zone already includes a zip code prefix range for that country (U.S. only). • You cannot select a state, province, or territory that is already assigned to another zone in the organization, even if the other zone is inactive.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Zip Code Prefix FromZip Code Prefix To</td><td>Enter the first and last three-position numeric zip code prefix (SCF) to include in the zone. For example, you can enter 015 and 017 to include the zip codes from 01501 through 01799. This option is available for the United States only. When you enter a zip code prefix range, you cannot also enter a state.
To select a zip code prefix range:
1. Select the United States from the Country dropdown list.
2. Complete the Zip Code Prefix From and the Zip Code Prefix To fields with three-position zip code prefixes.

Note:
Do not select a state from the State / Province dropdown list.

3. Click Add.
Restrictions:
• You cannot enter a zip code prefix range if the zone already includes a U.S. state or the entire United States.
• You cannot enter a range that overlaps a range included in a different zone in the organization, even if the other zone is inactive.
• The screen does not validate that your entries are existing SCF codes for the United States; however, your entries must be numeric.</td></tr>
</table>

Adding a geographical area to a zone:

1. Select the geographical areas to include in the zone. For each geographical area, enter either:
   - a country, or
   - a country and state, province, or territory, or
   - the United States and a zip code prefix range

   See the field descriptions above for more information.
2. Click *Add* to add the area to the zone. The screen displays an error if your entry is already assigned to this or another zone, or if it is not a valid entry for the current zone; otherwise, it adds the area to the list at the top of the screen.
3. Optionally, click *Reset* to clear the current selection from the State / Province dropdown or the current entries in the Zip Code Prefix From and Zip Code Prefix To fields.

Changing an existing area for the zone:

1. Highlight the geographical area in the list at the top of the screen to have the information default to the middle of the screen.
2. Edit the information as needed.
3. Click *Change*.

Deleting a geographical area from a zone:

1. Highlight the geographical area in the list at the top of the screen.
2. Click *Delete*.

Completing this step: Click:

- *Next* to continue to the *Define locations* step.
- *Previous* to return to the *Specify Zone Name* step.
- *Cancel* to exit the Zone Fulfillment Wizard and discard your entries or changes.

Define locations

Purpose: Use this step to select the primary and, optionally, alternate locations that can fulfill delivery or ship-for-pickup orders shipping within the zone and to include in locate items searches. You select primary and alternate locations by dragging the locations to the correct area of the screen.

How to display: You advance to this step by clicking *Next* at the *Zone includes Shipping Addresses in* step.

Which locations are available for selection? This screen includes all locations in the *organization*, regardless of whether the locations are currently flagged to support shipment (for delivery orders) or sourcing (for ship-for-pickup orders) based on the settings at the *Preferences* screen. However, the *default unfulfillable location* is not available for selection.

Types of locations at this screen: This screen includes:

- *Eligible Locations:* Locations with the organization that are not currently selected as either a primary or alternate search location for the zone. Locations that remain in the eligible location listing are never selected for delivery or ship-for-pickup orders shipping within the zone or included in locate items searches.
- *Primary Search Locations:* The preferred location(s) for assignment of delivery or ship-for-pickup orders that are shipping within the zone. If there are multiple primary search locations specified that might be able to fulfill the order, the Routing Engine uses the criteria specified at the *Preferences* screen to select locations. If an order can be fulfilled within the primary locations, the Routing Engine does not consider the alternate search locations, regardless of the *Preferences* settings for your organization.
- *Alternate Search Locations:* The location(s) to select if the primary search locations could not fulfill the order or meet the locate items search criteria. If there are multiple alternate search locations that might be able to fulfill the order, the Routing Engine uses the criteria specified at the *Preferences* screen to select locations.

How do locations default to the Primary Search Locations list? If any of the locations in the organization match the state / province or zip code prefix range specified at the *Zone includes Shipping Addresses in* step, these locations default to the Primary Search Locations list when you are creating a new zone; however, you can move these locations to a different list, or move other eligible locations to the Primary Search Locations list.

Fields at this screen

Field	Description
	The following information is displayed for Eligible Locations, Primary Search Locations, and Alternate Search Locations. See the *New Location* screen for more information.
Location	The code identifying a location. Location codes can be 1 to 10 positions in length, and must be unique for the system.
Name	The name describing the location. Location names can be 1 to 40 positions in length, and do not need to be the same as the name or description of the location in the integrated system, such as Order Management System or Xstore.
City	The city where the location is located. Can be up to 35 positions.
State/Province	The state, province, or territory where the location is located. Can be up to 3 positions. Validated against the ISO code.
Country	The code identifying the country. Can be a two-position alpha, three-position alpha, or three-position numeric code, validated against the ISO 3166 list of country codes.
Postal Code	The U.S. ZIP code or Canadian postal code for the location.
Rank	The rank you have assigned to the location. Informational. Up to 10 positions.
Region	The region you have assigned to the location. Informational. Up to 20 positions.
System	The *system* where the location is located.

Selecting primary and alternate search locations:

- Drag locations from among the Eligible Locations, Primary Search Locations, and Alternate Search Locations lists as needed to specify the preferred and alternate locations for the zone. You can also:
- select multiple locations at once by holding the CTRL key and clicking each additional location
- select a group of locations by clicking the first one and then holding down the SHIFT key when you click the last one
- Optionally, sort on a column, expand a column, or rearrange columns before selecting locations. For example:
- Click the Region column heading to sort locations by region.
- Position the cursor between the Name and City column headings until the cursor turns into a double-pointed arrow, then drag the City column heading to the right to enlarge the Name column.
- Position the cursor on the Rank column heading, drag the entire column to the left, and drop it between the Location and Name columns.
- Filter: Optionally, enter a full or partial location field to restrict the displayed locations to your entry. For example, enter a Postal Code of *016* to restrict the listed locations to those whose postal codes start with 016.

Completing this step: Click:

- *Next* to continue to the *Review Zone* step.
- *Previous* to return to the *Zone includes Shipping Addresses in* step.

- *Cancel* to exit the Zone Fulfillment Wizard and discard your entries or changes.

Review Zone

Purpose: Use this step to review a zone you have created or changed, and to accept or reject your entries or changes.

How to display: You advance to this step by clicking *Next* at the *Define locations* step.

This step displays the zone you have created or changed using the *Fulfillment Zone Wizard*. See the *Specify Zone Name* step for information on the geographical locations included in the zone, and see the *Define locations* step for information on the primary and alternate locations for the zone.

Zone restrictions for active zones:

- A zone restriction (for example, state, province, or territory within a country) can exist in just a single active zone, but
- The same zone restriction can exist within any number of inactive zones.

As a result, the Fulfillment Zone wizard applies the following rules:

- You can't create a new active zone that includes a zone restriction that already exists within another existing active zone.
- You can't activate an existing inactive zone if it includes a zone restriction that is already within an existing active zone.
- You can't add a zone restriction to an active zone if the restriction is already included in another existing active zone.

Completing this step: Click *Save* to accept your changes and save the zone, or click *Cancel* to reject all changes to the zone and return to the *Fulfillment Zones* screen. If you click *Cancel* while creating a new zone, the zone is not saved.

Optionally, click *Previous* to return to the *Define locations* step.

When does the Routing Engine start using a zone? The Routing Engine does not restrict delivery or ship-for pickup orders or search responses to a zone unless:

- the *Use Zone Fulfillment* flag at the **Preferences** screen is selected, and
- the zone is flagged as *Active*

Troubleshooting Zone Fulfillment

Purpose: The following table provides possible explanations for questions related to zone fulfillment.

Issue/Question	Possible Explanation
The Routing Engine is not using zones to select fulfilling locations	• *Zone not active?* Check the *Fulfillment Zones* screen to make sure the zone is currently flagged as active. • *Preference not selected?* Check the Use Zone Fulfillment setting at the *Preferences* screen. • *Locations do not support order type?* Check the settings of the Delivery Available or Ship For Pickup Sourcing Available flags at the *Preferences* screen. You can change this setting at the organization, location type, and location level; the most specific setting takes precedence. • *Location excluded based on probability rules?* Probability rules can still exclude a location even when you use zone fulfillment. See the *Probability Rule Overview* for background. • *Country not U.S. or Canada?* Zone fulfillment for countries other than the United States and Canada is supported only if the Use Proximity Locator preference is unselected for the organization. • *Country for address not specified?* If a locate items request does not specify a country and no country is associated with the requesting location, zone fulfillment restrictions do not apply and all locations for the organization are eligible to be included in the response (subject to the settings at the *Preferences* screen and any probability rules).
Can you override location selection by zone?	• *Locate Items can specify a requested_location:* If a *locate items* request specified a *requested location*, the response includes just the requested location regardless of whether the location is associated with the zone for the shipping address. • *SubmitOrder can specify a fulfilling location:* If the *submit order message* specifies a fulfilling location, the Routing Engine assigns the order to the location regardless of whether the location is associated with the zone for the shipping address.

Browse Fulfillment Zones

Purpose: Use the **Browse Fulfillment Zones** window to review a zone, including the geographical areas that it includes, and the primary and alternate locations selected to fulfill or source delivery or ship-for-pickup orders in those areas.

Used for the Routing Engine module.

How to display this window: Click a zone once at the *Fulfillment Zones* screen.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Fulfillment Zones* authority can display this screen. See the *Role Wizard* for more information.

Options at this window

Option	Procedure
edit the displayed zone	Click *Edit* to advance to the *Fulfillment Zone Wizard*.
review the next zone	Click the next icon ( ) to display the next zone.
review the previous zone	Click the previous icon ( ) to display the previous zone.

Fields at this window

Field	Description
Organization	The *organization* where the zone applies to location selection for delivery or ship-for-pickup orders.
Zone Name	The name of the zone.
Active	Indicates whether the zone fulfillment restrictions currently apply to delivery or ship-for-pickup orders. **Note:** Zone fulfillment does not apply unless the Use Zone Fulfillment flag at the **Preferences** screen is selected, even if the zone is flagged as *Active*.
Zone includes Shipping Addresses in	The geographical areas that are restricted to the primary or alternate locations specified for the zone. If a shipping address is included in the geographical areas for more than one zone, the Routing Engine uses the zone with the most specifically-defined area: for example, if one zone specifies a matching country, and another zone specifies a matching state or province, the zone with the matching state or province applies. *Country:* A country where orders are subject to the zone restrictions. *State/Province:* A state or province where orders are subject to the zone restrictions. Can be specified for the United States or Canada only. *Zip Code Prefix Range:* A range of zip code prefixes where orders are subject to the zone restrictions. Can be specified only within the United States.

Field	Description
Primary Search Locations	The locations that the Routing Engine should select to fulfill or source a delivery or ship-for-pickup order shipping to the geographical areas listed under Zone includes Shipping Addresses in. • *Location:* The code identifying the location. • *Name:* The name of the location. • *System:* The system associated with the location. **Note:** You can use the *Fulfillment Zone Wizard* to review additional information about each location, such as rank, region, city, state/province, country, and postal code.
Alternate Search Locations	The alternate locations that the Routing Engine can select to fulfill or source a delivery or ship-for-pickup order shipping to the geographical areas listed under Zone includes Shipping Addresses in, if the primary locations cannot fulfill the order. • *Location:* The code identifying the location. • *Name:* The name of the location. • *System:* The system associated with the location. **Note:** You can use the *Fulfillment Zone Wizard* to review additional information about each location, such as rank, region, city, state/province, country, and postal code.

Vendors

Purpose: Use the **Vendors** screen to work with vendors who fulfill drop ship orders.

What is a vendor? A vendor fulfills drop ship purchase orders processed through the Supplier Direct Fulfillment module.

Default vendor system required: Before you create any vendors, you need to use the *System* screen to create the *default vendor system* for your organization. The default vendor system needs to have the Vendor Default flag at the *System* screen selected. You do not need to set any other values for the default vendor system.

Ways to create a vendor: An integrated system such as Order Management System can create a vendor by:

- sending the *CreateDSVendor* message to Order Broker. This message can include the vendor's address and contact information, including phone numbers and an email address.
- sending a *CreateDSOrder* message to Order Broker for a vendor who does not already exist in Order Broker. When you create a vendor this way, the Contact and Return Address information is blank.
- clicking *Create* at this screen; see *create a new vendor* below for more information.

Preference and Carrier default settings: When you create a vendor through the CreateDSVendor or CreateDSOrder messages:

- *Preferences:* All the vendor's settings at the *Preferences* tab are blank or zero, except that the Generate Format for the pack slip is set to *Both PDF and CSV*, and the PDF Form Type is *Graphical*.
- *Carrier assignments:* The vendor is automatically assigned to all active carriers.

You can use the *Edit Vendor* screen to change any of these defaults.

Order Management System integration: Vendors in Order Broker that correspond to Order Management System vendors must have codes identical to the Order Management System vendor codes. Order Management System uses numeric vendor codes and does not support non-numeric codes.

Vendor anonymized? If the vendor data has been *anonymized*, asterisks are displayed for the name, telephone, and email address:

*** ***

***

Also, if the vendor data has been anonymized, searching by vendor name is not supported.

A vendor is eligible to be anonymized only if there are no open purchase orders. When the vendor is anonymized, it is flagged as inactive.

See *Anonymizing Data* for background.

How to display this screen: Select *Vendors* from the *Home Screen* or from the *Locations Menu*.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Vendors* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>create a new vendor</td><td>Each of the fields at the top of the screen is required. Also, you need to create a default vendor system for the organization before you can create any vendors.

Optionally, select a different organization from the Organization drop-down box. See Data Hierarchy for more information on how locations are assigned to organizations.

Note:
You must complete the Preferences screen for an organization before you can select it.
Enter a Vendor Code. The code must be unique within the selected organization, and can be 1 to 10 positions in length.
Enter a Vendor Name. The name can be 1 to 40 positions in length.
Click New. If:

a vendor with the same Vendor Code already exists for the organization, Order Broker displays an error message.
you did not complete the required fields, Order Broker displays an error message.
there is no default vendor system for the organization, Order Broker displays an error message.
your entries were accepted, you advance to the New Vendor screen, where you can enter additional information about the vendor. However, if you click Cancel after advancing to the New Vendor screen, the vendor is not created.

Order Management System integration: Vendors in Order Broker that correspond to Order Management System vendors must have codes identical to the Order Management System vendor codes.</td></tr>
</table>

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>search for a vendor</td><td>
The organization associated with your Default Shipping System is selected by default, but no vendors are displayed. Click Search to retrieve the first 50 vendors for your organization, or use any combination of the fields at the top of the screen to restrict the search results to matching vendors:

Optionally, select a different organization from the Organization drop-down box to restrict your results to that organization.
Note:
You can select a blank organization to remove this field from your selection criteria.
Optionally, enter a full or partial vendor code in the Vendor Code field to restrict your results to vendors whose codes start with your entry.
Optionally, enter a full or partial vendor name in the Vendor Name field to restrict your results to vendors whose names contain your entry. If a vendor has been anonymized, you cannot search for it by vendor name.
Optionally, select a setting in the Active dropdown field to restrict your results to vendors whose statuses match your selection.
Click Search.

Case: The vendor code and name are case-insensitive for searching; for example, an entry of <code>n</code> matches a vendor of <code>Northern</code>.
</td></tr>
<tr><td>activate or deactivate a vendor</td><td>
The inactive icon () indicates that the vendor is not currently active and that vendor users cannot currently log into the Vendor Portal;
otherwise, the active icon () indicates that the vendor is active, and vendors can log in. To switch between the settings, click the icon that is currently displayed.
When a vendor is anonymized, it is flagged as inactive.
Note:
Flagging a vendor as inactive does not prevent creating new purchase orders for the vendor.
</td></tr>
</table>

Option	Procedure
select a vendor for review or maintenance	Click the edit icon ( ) to advance to the *Edit Vendor* screen, where you can review or work with additional information about the vendor, such as address, preferences, and assigned carriers. **Note:** If the *Edit Vendor* screen is already open in another tab, you advance to that screen, where the previously-selected vendor is displayed.
delete a vendor	Select the delete icon ( ) next to a vendor to delete the vendor from Order Broker. You can delete a vendor only if there are no existing purchase orders for the vendor.

Fields at this screen

Field	Description
Search/new fields:	
Organization	See *organization*. Required to create a new vendor. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. **Note:** You must complete the *Preferences* screen for an organization before you can select it.
Vendor Code	The code identifying the vendor. Required to create a new vendor. Can be 1 to 10 positions in length. Vendor codes in Order Management System are always numeric and a maximum of 7 positions. Case-insensitive for searching; for example, an entry of `n` matches a vendor of `Northern`.
Vendor Name	Vendor names can be 1 to 40 positions in length, and do not need to be the same as the name or description of the vendor in the integrated system, such as Order Management System. Required to create a new vendor. If a vendor has been *anonymized*, you cannot search for it by vendor name. Case-insensitive for searching; for example, an entry of `n` matches a vendor name of `Northern`.

Field	Description
Active	Indicates whether the vendor is currently active and whether *vendor users* can currently log into the *Vendor Portal*. Optionally, select a setting in the Active dropdown field to restrict your results to vendors whose status match your selection. **Note:** Flagging a vendor as inactive does not prevent creating new purchase orders for the vendor.
Results fields:	
Organization	See *organization*.
Vendor Code	The code identifying a vendor.
Vendor Name	The descriptive name of the vendor. Asterisks are displayed if the vendor has been *anonymized*.
Telephone	The phone number from the vendor's Contact address. See the *Edit Vendor* screen for information on the fields at the *Contact* tab. Asterisks are displayed if the vendor has been *anonymized*.
Emails	The vendor's email address(es) from the Contact address. See the *Edit Vendor* screen for information on the fields at the *Contact* tab. Asterisks are displayed if the vendor has been *anonymized*.
Active	The inactive icon ( ) indicates that *vendor users* cannot currently log into the Vendor Portal; otherwise, the enabled icon ( ) indicates that vendor users can currently log in. To switch between the settings, click the icon that is currently displayed. When a vendor has been *anonymized*, it is flagged as inactive. If someone attempts to log in to the Vendor Portal for an inactive vendor, the login screen displays an error: `Log in failed`. **Note:** Flagging a vendor as inactive does not prevent creating new purchase orders for the vendor.

Field	Description
Edit	Select the edit icon ( ) to advance to the *Edit Vendor* screen. **Note:** If the *Edit Vendor* screen is already open in another tab, you advance to that screen, where the previously-selected vendor is displayed.
Delete	Select the delete icon ( ) next to a vendor to delete the vendor from Order Broker. This option is available only if there are no existing purchase orders for the vendor.

New Vendor

Purpose: Use the **New Vendor** screen to complete creation of a new vendor, including:

- specifying the vendor's contact information and addresses and the vendor's return address
- setting up vendor preferences, including:
  - integration information, if this is an integrated vendor rather than one who uses the Vendor Portal screens
  - pack slip and pullsheet generation settings
  - invoicing options
  - email notification options
- editing the carriers that are eligible by default for shipments from this vendor

Used for the Supplier Direct Fulfillment module.

Other ways to create a vendor: See the *Vendors* screen for a discussion of ways to create a vendor.

How to display this screen: Begin creation of a new vendor at the *Vendors* screen.

Note:

- If you click *Cancel* after advancing to the **New Vendor** screen, the new vendor is not created.
- Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Vendors* authority can display this screen. See the *Role Wizard* for more information.
- If the **New Vendor** screen was already open in another tab when you clicked the *New* button, you advance to this screen with the previous new vendor information displayed.

Options at this screen

Option	Procedure
set up contact information for the vendor	1. Use the *Contact tab* to enter the vendor's name, address, email(s), and phone number(s). Contact information is optional unless the *Integration Enabled* flag is selected at the *Drop Ship Preferences* screen, indicating that vendors can confirm shipments through an integration with shipping service such as ADSI; in this case, the vendor's contact address is required to determine the originating shipping address. 2. If you are done entering information for the new vendor, click *Save*.
set up the vendor's return address	Use the *Return Address tab* to enter the vendor's name and return address, email(s), and phone number(s). Return address information is optional.If you are done entering information for the new vendor, click *Save*.
specify the vendor's integration, pack slip and pullsheet generation, invoicing and email settings	1. Use the *Preferences tab* to set up: • *Integration:* Configuration options for an integrated vendor • *Pack Slip:* Specify whether to generate documents in PDF format, CSV format, or both; whether the PDF forms should be graphical; and whether to generate the batch pullsheet. See the *Preferences tab* for more information. • *Email:* Specify which emails to generate to the vendor, the email address to use for each. • *Data Formats:* Specify the language to use for vendor forms (pull sheets) and emails, and the date/time and numeric formats to use on Vendor Portal screens as well as on pull sheets and in emails. 2. If you are done entering information for the new vendor, click *Save*.

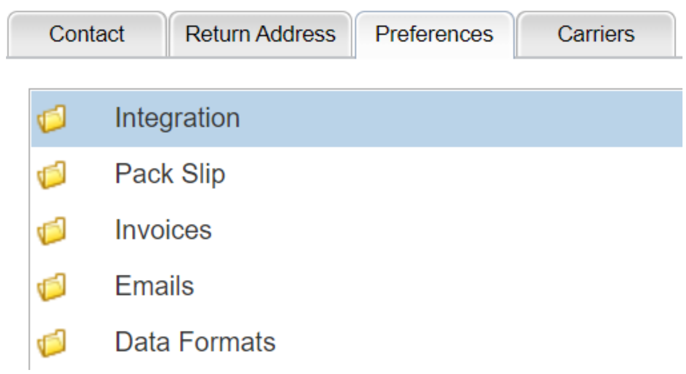
Option	Procedure
remove any carriers that should not be available for the vendor to use or order shipments	1. At the *Carriers* tab, unselect the *Assigned* flag for any carriers that the should not be available to the vendor. The vendor will not be able to confirm any shipments using this carrier, even if the carrier is specified for the purchase order line. 2. If you are done entering information for the new vendor, click *Save*.

Fields at this screen

Update any of the fields described below and click *Save*, or click *Cancel* to return to the *Vendors* screen without saving the vendor.

Field	Description
Organization	See *organization*. Display-only.
Vendor Code	The vendor code you entered at the *Vendors* screen. Display-only. *Order Management System integration:* The code representing the Order Management System vendor must match the vendor code in that system.
Vendor Name	The descriptive name of the vendor. Can be up to 40 positions in length. Displayed to the vendor at the Vendor Portal. Required.
Contact tab	Contact information is optional unless the *Integration Enabled* flag is selected at the *Drop Ship Preferences* screen, indicating that vendors can confirm shipments through an integration with shipping service such as ADSI; in this case, the vendor's contact *Address*, including address line 1, city, state/province, postal code, and country, is required to determine the originating shipping address. The address information is validated against proximity data or through the geocode API only if the *Use Proximity Locator* preference is selected.
Contact Name	The *Name* of the contact for the vendor. Alphanumeric, 50 positions; optional.
Emails	The email address must be formatted as user@host.com (or other valid suffix such as .org). Order Broker does not validate that your entry represents an existing email address. Separate multiple email addresses with a semicolon (;). Your entry can be up to 245 positions total. Informational.
Telephones	Includes: • Telephone: alphanumeric, 20 positions; optional. • Ext (extension): alphanumeric, 10 positions; optional. • Fax: alphanumeric, 20 positions; optional.
Address	Made up of: • Address: four address lines of up to 50 positions each; optional. • Suite: alphanumeric, 20 positions; optional. • City: alphanumeric, 35 positions; optional. • State/Province: alphanumeric, 3 positions; optional. • Country: alphanumeric, 3 positions; optional. • Postal Code (ZIP code): alphanumeric, 20 positions; optional.
Return Address tab	The return address information is optional and all fields are informational only.

Field	Description
Company	Alphanumeric, 50 positions; optional.
Contact Name	Alphanumeric, 50 positions; optional.
Emails	Alphanumeric, 255 positions. Separate multiple email addresses with a semicolon (;) and no space; optional.
Telephone	Includes: • Telephone: alphanumeric, 20 positions; optional. • Ext (extension): alphanumeric, 10 positions; optional. • Fax: alphanumeric, 20 positions; optional.
Address	Made up of: • Address: four address lines of up to 50 positions each; optional. • Suite: alphanumeric, 20 positions; optional. • City: alphanumeric, 35 positions; optional. • State/Province: alphanumeric, 3 positions; optional. • Country: alphanumeric, 3 positions; optional. • Postal Code (ZIP code): alphanumeric, 20 positions; optional; but if entered, validated against the proximity_location table or through the geocode API if the *Use Proximity Locator* preference is selected.
Preferences tab	Each vendor preference category is available by clicking the folder in the left-hand tab.



Integration options	Use these fields to configure the integration between the vendor's system and Order Broker, so the vendor can receive new purchase orders and confirm shipments through JSON messages rather than using the Vendor Portal screens. See the *Vendor Integration* for background, and the *Vendor Integration Guide* for more details.

Field	Description
Enable Integration	If this flag is selected, the Vendor Portal includes the **Get Purchase Orders** screen rather than the **Select Purchase Orders** screen. *Difference between the screens:* Use of the **Get Purchase Orders** screen to prompt an integrated vendor's system to request purchase orders is not currently implemented, while the **Select Purchase Orders** screen generates the purchase order documents as well changing the purchase order's status to In Process. *Recommendation:* Even though the **Get Purchase Orders** screen is not currently implemented, Oracle recommends that the Vendor Portal include the **Get Purchase Orders** screen rather than the **Select Purchase Orders** screen for an integrated vendor, in order to prevent a vendor user from inadvertently changing a purchase order's status to In Process before the vendor's system requests it through a JSON message. This flag is display-only on the **Vendor Configuration** screen in the Vendor Portal.
Require Acknowledgement	If this flag is selected, a purchase order's status doesn't change to *In Process* when the integration initially sends the purchase order to an integrated vendor system, and no pack slip or pullsheet is generated based on the settings at the Pack Slip options folder; instead, the integrated system needs to send an acknowledgment to update the status of the purchase order or generate the pack slip and pullsheet, if specified for the vendor. This flag is display-only on the **Vendor Configuration** screen in the Vendor Portal.
Vendor Client Id	Indicates the client ID for the integrated vendor to use when authenticating the getDSOrders, setDSAcknowledge, and setDSConfirm messages. Required for an integrated vendor to successfully submit these messages. Optionally, select a client ID to assign to the vendor. Only client IDs that have been assigned Vendor web service access and have not been assigned to another vendor are available for selection. See the Manage External Application Access screen and the Edit Web Services window for more information. **Note:** The screen does not display an error message if you select the Enable Integration flag but do not select a client ID for the vendor. Also, if you remove vendor web service access for the client through the Edit Web Services window, the client ID is removed from the vendor automatically. This ID is display-only on the **Vendor Configuration** screen in the Vendor Portal.

Field	Description
Pack Slip options	Use these options to control the documents generated when the vendor selects purchase orders for fulfillment. **Additional setup:** Use the *Preferences* tab for the brand for additional settings related to the pack slip and pullsheet, including the brand logo, the form programs, and the pack slip message. See *New Brand* screen in Modern View for field descriptions.
Generate Format	Indicates the format in which to generate the pack slip for the vendor. Possible settings are: • *Both PDF and CSV* (default) = Generate both a PDF of the pack slip and a CSV file containing the information on the pack slip. • *CSV* = Generate a CSV file containing the information on the pack slip, but no PDF. • *PDF* = Generate a PDF of the pack slip, but no CSV file. **Note:** If the PDF Form Type is set to *None*, no PDFs or CSVs are generated for the pack slip, regardless of the setting of the Generate Format field.
PDF Form Type	Controls the format of the PDF of the pack slip: • *Graphical* (default) = The pack slip PDF includes graphical elements, including the logo specified for the brand. **Note:** See the *New Brand* screen in Modern View for information on setting up the brand logo. • *Non-Graphical* = The pack slip PDF does not include any graphical elements. You would use this setting if the vendor prints the pack slip PDF onto pre-printed forms. • *None* = No pack slip PDF is generated, regardless of the setting of the Generate Format field.
Print Batch PullSheet	Controls whether to generate a batch pullsheet to aid in picking stock when the vendor generates pack slips. If this option is: • selected = A graphical PDF pullsheet is generated when the vendor generates pack slips. • unselected (default) = No pullsheet is generated when the vendor generates pack slips.
Invoices options	

Field	Description
Uses Invoicing	Controls general support for invoicing in the Vendor Portal: • selected = The Invoice # field is available in the Vendor Portal at the **Purchase Order Shipping** screen, and the Vendor Portal landing page displays the number of purchase orders eligible for invoicing. • unselected (default) = The Invoice # field is not available in the Vendor Portal at the **Purchase Order Shipping** screen, and the Vendor Portal landing page does not display the number of purchase orders eligible for invoicing. Also, with this setting you cannot select the Require Invoice # at Shipping preference, below. **Note:** This setting does not control the ability to create invoices; this ability is controlled by the *vendor user*'s authority based on assigned roles. See *Vendor User Profiles* for background.
Require Invoice # at Shipping	Controls whether entry of an invoice number is required at the **Purchase Order Shipping** screen in the Vendor Portal: • selected = Entry of the Invoice # is required at the **Purchase Order Shipping** screen in the Vendor Portal. If this field is selected, you must also select the Uses Invoices field, so that the Invoice # field is available for entry at the **Purchase Order Shipping** screen. **Note:** You cannot select this option unless the Uses Invoices preference, above, is selected. • unselected (default) = Entry of the Invoice # is not required at the **Purchase Order Shipping** screen in the Vendor Portal. If the Allow Invoices field is selected, then entry of an invoice is optional at the **Purchase Order Shipping** screen. If this setting is selected, then a *vendor user* cannot confirm shipments at the **Purchase Order Shipping** screen without authority to create invoices. See *Vendor User Profiles* for background on assigning authority to vendor users. This setting does not affect the **Integrated Shipping** screen or the **Purchase Order Shipping Upload** screen in the Vendor Portal; it applies to the **Purchase Order Shipping** screen only.

Field	Description
Unit Cost Threshold	The maximum percentage by which the unit cost on an invoice can exceed or fall below the original cost and still be approved automatically. If the vendor overrides the unit cost to an amount that exceeds or falls below the original cost by more than this percentage, the invoice goes into *Held* status for your review upon submission. *Example:* The Unit Cost Threshold is set to 10%, and the original unit cost on a shipped purchase order line is $10.00. If the vendor overrides the unit cost to: • between $11.00 and $9.00, the invoice goes into *Approved* status when the vendor submits it, because the unit price is still within the 10% threshold. • $11.01 or higher, or to $8.99 or lower, the invoice goes into *Held* status when the vendor submits it. Also, you receive the *Out-of-balance invoice notification email to retailer* if the *Invoice Balance Notification* flag is selected and an email address is specified at the *Email* tab of the *Drop Ship Preferences* screen. Order Broker evaluates each shipped line on the invoice individually, not the invoice as a whole. If any individual line breaches the threshold, Order Broker holds the invoice. The default setting is 10%. If you set this value to 0%, the invoice goes into *Held* status if the vendor changes the unit cost at all. Required. **Note:** This threshold applies to unit cost only, and does not account for any additional charges, such as header or detail freight, handling, or other charges.
Emails options	These fields control the email notifications automatically sent to the vendor. **Note:** With authority to the *Preferences* secured feature, the vendor administrator can also update these fields.
PO Notification	Select this flag to send an email notification to the email address(es) indicated when you send new purchase orders to the vendor for fulfillment, or when you submit an address change, cancellation request, or cost change. At least one email address is required if the flag is selected. See the *Supplier Direct Fulfillment Module Email Notifications Summary* for more information. Separate each additional email address with a semicolon and no space.
Upload Error Notification	Select this flag to send an email notification to the email address(es) indicated if there are any errors when the vendor uploads shipment confirmations or invoices. At least one email address is required if the flag is selected. See the *Supplier Direct Fulfillment Module Email Notifications Summary* for more information. Separate each additional email address with a semicolon and no space.

Field	Description
Invoice Balance Notification	Select this flag to send an email notification to the email address(es) indicated when you approve or reject an invoice that includes any *out-of-balance* lines. At least one email address is required if the flag is selected. See the *Supplier Direct Fulfillment Module Email Notifications Summary* for more information. Separate each additional email address with a semicolon and no space.
Data Formats options	These fields control: • the language to use on vendor forms (pull sheets), and for emails to the vendor • the date/time and numeric formats to use: – on the vendor pullsheet – for emails to the vendor – on Vendor Portal screens for the vendor • The language displayed on Vendor Portal screens is controlled by the locale code appended to the URL for the Vendor Portal. • The vendor's locale is not appended to the Vendor Portal link embedded in the email. The same URL is embedded for all vendors. • With authority to the *Preferences* secured feature, the vendor administrator can also update these fields.
Language	The language to use for the vendor pullsheet, and for emails to the vendor. Available languages are: • Brazil-Portuguese • China-Chinese (simplified) • France-French • Germany-German • Italy-Italian • Japan-Japanese (Gregorian calendar) • Netherlands-Dutch • Russia-Russian • Spain-Spanish • Sweden-Swedish • United States-English (default) Required.
Date Format	The format to use for the display of dates: • on Vendor Portal screens • on the vendor pullsheet • in system-generated emails to the vendor Available formats are: • MM/DD/YYYY (default): Month/day/year, for example: 12/31/2017 • DD.MM.YYYY: Day.month.year, for example: 31.12.2017 • DD/MM/YYYY: Day/month/year, for example: 31/12/2017 • YYYY/MM/DD: Year/month/day, for example: 2017/12/31 • DD-MM-YYYY: Day-month-year, for example: 31-12-2017 Required.

Field	Description
Time Format	The format to use for the display of times: • on Vendor Portal screens • on the vendor pullsheet • in system-generated emails to the vendor Available formats are: • AM/PM (default): For example: 11:40 AM • 24 Hour: For example: 13:01 Required.
Decimal Separator	The character to use as a decimal separator: • on Vendor Portal screens • on the vendor pullsheet • in system-generated emails to the vendor Available formats are: • Period (default): For example, 12.34 • Comma: For example, 12,34 Required. **Note:** The decimal separator and the thousands separator cannot be the same.
Thousands Separator	The character to use as a separator for numbers over 3 positions: • on Vendor Portal screens • on the vendor pullsheet • in system-generated emails to the vendor Available formats are: • Comma (default) For example, 1,234 • Period: For example, 1.234 • Space: For example, 1 234 Required. **Note:** The decimal separator and the thousands separator cannot be the same.
Carriers tab	Use this tab to indicate which carriers the vendor can use for shipping drop ship orders. Only carriers flagged as Active are available at this tab. All other fields at this tab are display-only; use the *Carriers* screen in Modern View to work with these settings for a carrier. **Assigned by default:** When you create a new vendor, all active carriers are assigned to the vendor by default. Also, when you create a new active carrier, it is automatically assigned to all existing vendors by default. **Automatic creation of carrier:** When you create a new carrier through the CreateDSOrder message, Order Broker creates a new carrier record, using a description of *Auto Created XYZ*, where *XYZ* is the `carrier_cd` passed in the message. The carrier is automatically assigned to all existing vendors as an active carrier, with the Tracking # Required, Weight Required, and Rate Required flags all unselected, indicating that the vendor does not need to supply this information when confirming a shipment for the carrier. **For more information:** See the *Carriers* screen in Modern View for more information on setting up carriers.

Field	Description
Assigned	Indicates whether the vendor is authorized to use this carrier for shipment of drop ship orders. All carriers are selected by default when you create a new vendor. Click the Assigned checkbox to change the assignment status of the carrier for the vendor.
Carrier Code	The code identifying the carrier. Display-only.
Carrier Description	The description of the carrier. A description such as `Auto Created 99`, where `99` is the carrier code, indicates that the carrier was created automatically through the CreateDSOrder message. Display-only.
Tracking # Required	Selected if the vendor must provide a tracking number for each shipment using this carrier; otherwise, the tracking number is optional. Display-only.
Weight Required	Selected if the vendor must provide the shipping weight for each shipment using this carrier; otherwise, the shipping weight is optional. Display-only.
Rate Required	Selected if the vendor must provide the shipping rate for each shipment using this carrier; otherwise, the shipping rate is optional. Display-only.

Edit Vendor

Purpose: Use the **Edit Vendor** screen to review or update a vendor, including:

- specifying the vendor's contact information and addresses and the vendor's return address
- setting up vendor preferences, including:
  - integration information, if this is an integrated vendor rather than one who uses the Vendor Portal screens
  - pack slip and pullsheet generation settings
  - invoicing options
  - email notification options
  - data formats for screens and emails
- editing the carriers that are eligible by default for shipments from this vendor

Used for the Supplier Direct Fulfillment module.

Vendor anonymized? When a vendor has been *anonymized*, asterisks are displayed for the vendor's name and all contact and return address data.

A vendor is eligible to be anonymized only if there are no open purchase orders for the vendor. When the vendor is anonymized, it is flagged as inactive.

See *Anonymizing Data* for background.

How to display this screen: Click the edit icon ( ) for an existing vendor at the *Vendors* screen.

- Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Vendors* authority can display this screen. See the *Role Wizard* for more information.

- If the **Edit Vendor** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previous vendor information displayed.

Options at this screen

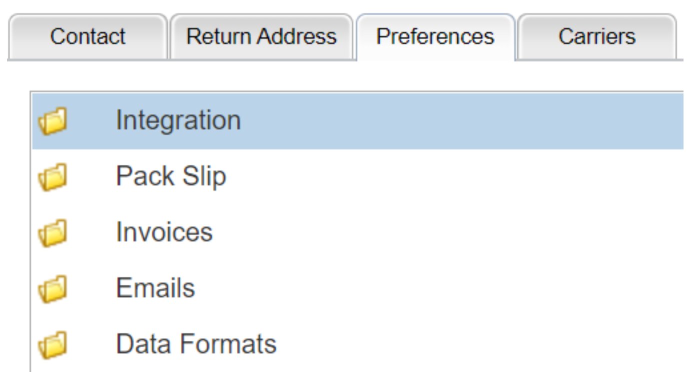
Option	Procedure
review or change the contact information for the vendor	1. Use the *Contact tab* to add or change the vendor's name, address, email(s), and phone number(s). Contact information is optional unless the *Integration Enabled* flag is selected at the *Drop Ship Preferences* screen, indicating that vendors can confirm shipments through an integration with shipping service such as ADSI; in this case, the vendor's contact address is required to determine the originating shipping address. 2. If you are done entering information for the vendor, click *Save*.
review or change the vendor's return address	1. Use the *Return Address tab* to add or change the vendor's name and return address, email(s), and phone number(s). Return address information is optional. 2. If you are done entering information for the vendor, click *Save*.
specify the vendor's integration, pack slip and pullsheet generation, invoicing and email settings	1. Use the *Preferences tab* to set up: • Integration configuration options for an *integrated vendor*. • Pack Slip: Specify whether to generate documents in PDF format, CSV format, or both; whether the PDF forms should be graphical; and whether to generate the batch pullsheet. • Email: Specify which emails to generate to the vendor, the email address to use for each, and the locale to use if the vendor requires emails in a different language. 2. If you are done entering information for the vendor, click *Save*.
remove any carriers that should not be available for the vendor to use or order shipments, or add carriers	1. At the *Carriers* tab, unselect the *Assigned* flag for any carriers that the should not be available to the vendor. The vendor will not be able to confirm any shipments using this carrier, even if the carrier is specified for the purchase order line. 2. To re-add a carrier, select the *Assigned* flag. 3. If you are done entering information for the vendor, click *Save*.

Fields at this screen

Update any of the fields described below and click *Save*, or click *Cancel* to return to the *Vendors* screen without saving any changes to the vendor.

Field	Description
Organization	See *organization*. Display-only.

Field	Description
Vendor Code	The vendor code you entered at the *Vendors* screen. Display-only. *Order Management System integration:* The code representing the Order Management System vendor must match the vendor code in that system.
Vendor Name	The descriptive name of the vendor. Can be up to 40 positions in length. Displayed to the vendor at the Vendor Portal. Required. When a vendor has been *anonymized*, asterisks are displayed.
Contact tab	Contact information is optional unless the *Integration Enabled* flag is selected at the *Drop Ship Preferences* screen, indicating that vendors can confirm shipments through an integration with shipping service such as ADSI; in this case, the vendor's contact *Address*, including address line 1, city, state/province, postal code, and country, is required to determine the originating shipping address. The address information is validated against proximity data or through the *Oracle Maps Cloud Service* only if the *Use Proximity Locator* preference is selected. **Vendor anonymized?** When a vendor has been *anonymized*, asterisks are displayed for all contact data. A vendor is eligible to be anonymized only if there are no open purchase orders for the vendor. When the vendor is anonymized, it is flagged as inactive. See *Anonymizing Data* for background.
Contact Name	The name of the contact for the vendor. Alphanumeric, 50 positions; optional.
Emails	The email address must be formatted as user@host.com (or other valid suffix such as .org). Order Broker does not validate that your entry represents an existing email address. Separate multiple email addresses with a semicolon (;). Your entry can be up to 245 positions total. Informational.
Telephones	Includes: • Telephone: alphanumeric, 20 positions; optional. • Ext (extension): alphanumeric, 10 positions; optional. • Fax: alphanumeric, 20 positions; optional.
Address	Made up of: • Address: four address lines of up to 50 positions each. Optional. • Suite: alphanumeric, 20 positions. Optional. • City: alphanumeric, 35 positions. Optional. • State/Province: alphanumeric, 3 positions. Optional. • Country: alphanumeric, 3 positions. Optional. • Postal Code (ZIP code): alphanumeric, 20 positions. Optional.
Return Address tab	The return address is optional and all fields are informational only. **Vendor anonymized?** When a vendor has been *anonymized*, asterisks are displayed for all return address data. A vendor is eligible to be anonymized only if there are no open purchase orders for the vendor. When the vendor is anonymized, it is flagged as inactive. See *Anonymizing Data* for background.

Field	Description
Company	Alphanumeric, 50 positions; optional.
Contact Name	Alphanumeric, 50 positions; optional.
Emails	Alphanumeric, 255 positions. Separate multiple email addresses with a semicolon (;) and no space; optional.
Telephone	Includes: • Telephone: alphanumeric, 20 positions; optional. • Ext (extension): alphanumeric, 10 positions; optional. • Fax: alphanumeric, 20 positions; optional.
Address	Made up of: • Address: four address lines of up to 50 positions each. Optional. • Suite: alphanumeric, 20 positions. Optional. • City: alphanumeric, 35 positions. Optional. • State/Province: alphanumeric, 3 positions. Optional. • Country: alphanumeric, 3 positions. Optional. • Postal Code (ZIP code): alphanumeric, 20 positions. Optional; but if entered, validated against the proximity_location or through the *Oracle Maps Cloud Service* if the *Use Proximity Locator* preference is selected.
Preferences tab	Each vendor preference category is available by clicking the folder in the left-hand tab. 
Integration and PO Schedule options	Use these fields to configure the integration between the vendor's system and Order Broker, so the vendor can receive new purchase orders and confirm shipments through JSON messages rather than using the Vendor Portal screens. See the *Vendor Integration* for background, and the *Vendor Integration Guide* for more details.

Field	Description
Enable Integration	If this flag is selected, the Vendor Portal includes the *Get Purchase Orders* screen rather than the *Select Purchase Orders* screen. *Difference between the screens:* Use of the *Get Purchase Orders* screen to prompt an integrated vendor's system to request purchase orders is not currently implemented, while the *Select Purchase Orders* screen generates the purchase order documents as well changing the purchase order's status to In Process. *Recommendation:* Even though the *Get Purchase Orders* screen is not currently implemented, Oracle recommends that the Vendor Portal include the *Get Purchase Orders* screen rather than the *Select Purchase Orders* screen for an integrated vendor, in order to prevent a vendor user from inadvertently changing a purchase order's status to In Process before the vendor's system requests it through a JSON message. This flag is display-only on the *Vendor Configuration* screen in the Vendor Portal.
Require Acknowledgement	If this flag is selected, a purchase order's status doesn't change to *In Process* when the integration initially sends the purchase order to an integrated vendor system, and no pack slip or pullsheet is generated based on the settings at the *Pack Slip options* folder; instead, the integrated system needs to send an acknowledgment to update the status of the purchase order or generate the pack slip and pullsheet, if specified for the vendor. This flag is display-only on the **Vendor Configuration** screen in the Vendor Portal.
Vendor Client Id	Indicates the client ID for the integrated vendor to use when authenticating the getDSOrders, setDSAcknowledge, and setDSConfirm messages. Required for an integrated vendor to successfully submit these messages. Optionally, select a client ID to assign to the vendor. Only client IDs that have been assigned Vendor web service access and have not been assigned to another vendor are available for selection. See the *Manage External Application Access* screen and the *Edit Web Services* window for more information. **Note:** The screen does not display an error message if you select the Enable Integration flag but do not select a client ID for the vendor. Also, if you remove vendor web service access for the client through the *Edit Web Services* window, the client ID is removed from the vendor automatically. This ID is display-only on the **Vendor Configuration** screen in the Vendor Portal.
Pack Slip options	Use these options to control the documents generated when the vendor selects purchase orders for fulfillment. **Additional setup:** Use the *Preferences* tab for the brand for additional settings related to the pack slip and pullsheet, including the brand logo, the form programs, and the pack slip message. See *New Brand* screen in Modern View for field descriptions.

Field	Description
Generate Format	Indicates the format in which to generate the pack slip for the vendor. Possible settings are: • *Both PDF and CSV* (default) = Generate both a PDF of the pack slip and a CSV file containing the information on the pack slip. • *CSV* = Generate a CSV file containing the information on the pack slip, but no PDF. • *PDF* = Generate a PDF of the pack slip, but no CSV file. **Note:** If the PDF Form Type is set to *None*, no PDFs or CSVs are generated for the pack slip, regardless of the setting of the Generate Format field.
PDF Form Type	Controls the format of the PDF of the pack slip: • *Graphical* (default) = The pack slip PDF includes graphical elements, including the logo specified for the brand. **Note:** See the *New Brand* or *Edit Brand* screens in Modern View for information on setting up the brand logo. • *Non-Graphical* = The pack slip PDF does not include any graphical elements. You would use this setting if the vendor prints the pack slip PDF onto pre-printed forms. • *None* = No pack slip PDF is generated, regardless of the setting of the Generate Format field.
Print Batch PullSheet	Controls whether to generate a batch pullsheet to aid in picking stock when the vendor generates pack slips. If this option is: • selected = A graphical PDF pullsheet is generated when the vendor generates pack slips. • unselected (default) = No pullsheet is generated when the vendor generates pack slips.
Invoices options	

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Uses Invoicing</td><td>Controls general support for invoicing in the Vendor Portal:
selected = The Invoice # field is available in the Vendor Portal at the Purchase Order Shipping screen, and the Vendor Portal landing page displays the number of purchase orders eligible for invoicing.
unselected (default) = The Invoice # field is not available in the Vendor Portal at the Purchase Order Shipping screen, and the Vendor Portal landing page does not display the number of purchase orders eligible for invoicing. Also, with this setting you cannot select the Require Invoice # at Shipping preference, below.
Note:
This setting does not control the ability to create invoices; this ability is controlled by the vendor user's authority based on assigned roles. See Vendor User Profiles for background.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Require Invoice # at Shipping</td><td>Controls whether entry of an invoice number is required at the Purchase Order Shipping screen in the Vendor Portal:

selected = Entry of the Invoice # is required at the Purchase Order Shipping screen in the Vendor Portal. If this field is selected, you must also select the Uses Invoices field, so that the Invoice # field is available for entry at the Purchase Order Shipping screen.

Note:
You cannot select this option unless the Uses Invoices preference, above, is selected.
unselected (default) = Entry of the Invoice # is not required at the Purchase Order Shipping screen in the Vendor Portal. If the Allow Invoices field is selected, then entry of an invoice is optional at the Purchase Order Shipping screen.

Note:

If this setting is selected, then a vendor user cannot confirm shipments at the Purchase Order Shipping screen without authority to create invoices. See Vendor User Profiles for background on assigning authority to vendor users.
This setting does not affect the Integrated Shipping screen or the Purchase Order Shipping Upload screen in the Vendor Portal; it applies to the Purchase Order Shipping screen only.

</td></tr>
</table>

Field	Description
Unit Cost Threshold	The maximum percentage by which the unit cost on an invoice can exceed or fall below the original cost and still be approved automatically. If the vendor overrides the unit cost to an amount that exceeds or falls below the original cost by more than this percentage, the invoice goes into *Held* status for your review upon submission. *Example:* The Unit Cost Threshold is set to 10%, and the original unit cost on a shipped purchase order line is $10.00. If the vendor overrides the unit cost to: • between $11.00 and $9.00, the invoice goes into *Approved* status when the vendor submits it, because the unit price is still within the 10% threshold. • $11.01 or higher, or to $8.99 or lower, the invoice goes into *Held* status when the vendor submits it. Also, you receive the Out-of-balance invoice notification email to retailer if the *Invoice Balance Notification* flag is selected and an email address is specified at the *Email* tab of the Drop Ship Preferences screen. Order Broker evaluates each shipped line on the invoice individually, not the invoice as a whole. If any individual line breaches the threshold, Order Broker holds the invoice. The default setting is 10%. If you set this value to 0%, the invoice goes into *Held* status if the vendor changes the unit cost at all. Required. **Note:** This threshold applies to unit cost only, and does not account for any additional charges, such as header or detail freight, handling, or other charges.
Emails options	These fields control the email notifications automatically sent to the vendor. **Note:** With authority to the *Preferences* secured feature, the vendor administrator can also update these fields.
PO Notification	Select this flag to send an email notification to the email address(es) indicated when you send new purchase orders to the vendor for fulfillment or when you submit an address change, cancellation request, or cost change. At least one email address is required if the flag is selected. See the Supplier Direct Fulfillment Module Email Notifications Summary for more information. Separate each additional email address with a semicolon and no space.

Field	Description
Upload Error Notification	Select this flag to send an email notification to the email address(es) indicated if there are any errors when the vendor uploads shipment confirmations or invoices. At least one email address is required if the flag is selected. See the *Supplier Direct Fulfillment Module Email Notifications Summary* for more information. Separate each additional email address with a semicolon and no space.
Invoice Balance Notification	Select this flag to send an email notification to the email address(es) indicated when you approve or reject an invoice that includes any *out-of-balance* lines. At least one email address is required if the flag is selected. See the *Supplier Direct Fulfillment Module Email Notifications Summary* for more information. Separate each additional email address with a semicolon and no space.
Data Formats options	These fields control: • the language to use on pullsheets, and for emails to the vendor • the date/time and numeric formats to use: – on vendor pullsheets – for emails to the vendor – on Vendor Portal screens for the vendor **Note:** • The language displayed on Vendor Portal screens is controlled by the locale code appended to the URL for the Vendor Portal. • The vendor's locale is not appended to the Vendor Portal link embedded in the email. The same URL is embedded for all vendors. • With authority to the *Preferences* secured feature, the vendor administrator can also update these fields.

Field	Description
Language	The language to use for vendor pullsheets, and for emails to the vendor. Available languages are: • Brazil-Portuguese • China-Chinese (simplified) • France-French • Germany-German • Italy-Italian • Japan-Japanese (Gregorian calendar) • Netherlands-Dutch • Russia-Russian • Spain-Spanish • Sweden-Swedish • United States-English (default) The Language is also set to United States-English when you create a new vendor through the CreateDSVendor message. Required.
Date Format	The format to use for the display of dates: • on Vendor Portal screens • on the vendor pullsheet • in system-generated emails to the vendor Available formats are: • MM/DD/YYYY (default): Month/day/year, for example: 12/31/2017 • DD.MM.YYYY: Day.month.year, for example: 31.12.2017 • DD/MM/YYYY: Day/month/year, for example: 31/12/2017 • YYYY/MM/DD: Year/month/day, for example: 2017/12/31 • DD-MM-YYYY: Day-month-year, for example: 31-12-2017 Required.
Time Format	The format to use for the display of times: • on Vendor Portal screens • on the vendor pullsheet • in system-generated emails to the vendor Available formats are: • AM/PM (default): For example: 11:40 AM • 24 Hour: For example: 13:01 Required.
Decimal Separator	The character to use as a decimal separator: • on Vendor Portal screens • on the vendor pullsheet • in system-generated emails to the vendor Available formats are: • Period (default): For example, 12.34 • Comma: For example, 12,34 Required. **Note:** The decimal separator and the thousands separator cannot be the same.

Field	Description
Thousands Separator	The character to use as a separator for numbers over 3 positions: • on Vendor Portal screens • on the vendor pullsheet • in system-generated emails to the vendor Available formats are: • Comma (default) For example, 1,234 • Period: For example, 1.234 • Space: For example, 1 234 Required. **Note:** The decimal separator and the thousands separator cannot be the same.
Carriers tab	Use this tab to indicate which carriers the vendor can use for shipping drop ship orders. Only carriers flagged as Active are available at this tab. All other fields at this tab are display-only; use the *Carriers* screen in Modern View to work with these settings for a carrier. **Assigned by default:** When you create a new vendor, all active carriers are assigned to the vendor by default. Also, when you create a new active carrier, it is automatically assigned to all existing vendors by default. **Automatic creation of carrier:** When you create a new carrier through the CreateDSOrder message, Order Broker creates a new carrier record, using a description of *Auto Created XYZ*, where *XYZ* is the `carrier_cd` passed in the message. The carrier is automatically assigned to all existing vendors as an active carrier, with the Tracking # Required, Weight Required, and Rate Required flags all unselected, indicating that the vendor does not need to supply this information when confirming a shipment for the carrier. **For more information:** See the *Carriers* screen in Modern View for more information on setting up carriers.
Assigned	Indicates whether the vendor is authorized to use this carrier for shipment of drop ship orders. All carriers are selected for the vendor by default if they are flagged as Active at creation. If a carrier was created as inactive and afterward flagged as Active, it is then selected for the vendor. Click the Assigned checkbox to change the assignment status of the carrier for the vendor.
Carrier Code	The code identifying the carrier. Display-only.
Carrier Description	The description of the carrier. A description such as `Auto Created 99`, where `99` is the carrier code, indicates that the carrier was created automatically through the CreateDSOrder message. Display-only.
Tracking # Required	Selected if the vendor must provide a tracking number for each shipment using this carrier; otherwise, the tracking number is optional. Display-only.
Weight Required	Selected if the vendor must provide the shipping weight for each shipment using this carrier; otherwise, the shipping weight is optional. Display-only.
Rate Required	Selected if the vendor must provide the shipping rate for each shipment using this carrier; otherwise, the shipping rate is optional. Display-only.

11

Reports Menu

Run Reports

Purpose: Use the **Run Reports** screen to run reports interactively.

Scheduling reports: You can use the *Schedule Report* window to schedule reports to run on particular days and times.

Viewing generated reports

When you use this screen to run a report:

- *PDF version:* If you generate a PDF version of the report, it opens in a separate tab within Order Broker, using a PDF viewer. You can then use your browser's standard options to print or save a copy of the generated report. You can also review the report later through the *View Reports* screen.
- *Spreadsheet version:* If you generate an XLSX version of the report, it is available for download (using your browser's default file download process) so you can work with it in a spreadsheet application; however, a new tab opens in Order Broker indicating that the report will open in a spreadsheet application. It is not necessary to keep this tab open. You can also review the report later through the *View Reports* screen.

> **Note:**
>
> If you have difficulty opening the XLSX file version of the report from the browser, save the report file and then open it with your spreadsheet application.

Email? Optionally, you can send a generated report in either PDF or Excel format to one or more email addresses.

Each generated report is also available for review at the *View Reports* screen.

> **Note:**
>
> The ability of a *retailer user* to generate specific reports is not controlled by role. For example, if a retailer user has authority to generate reports, but does not have authority to drop ship options, the user can still generate drop ship reports.

How to display this screen: Select *Run Reports* from the *Home Screen* or from the *Reports Menu*.

> **Note:**
>
> Only users with *Run Reports* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
run the Auto Cancel Report	See the *Auto Cancel Report*. Used for the Routing Engine module.
run the Location Import Errors Report	See the *Location Import Errors Report*. Used for the Routing Engine module.
run the Order Status Report	See the *Order Status Report*. Used for the Routing Engine module.
run the Product Import Errors Report	See the *Product Import Errors Report*. Used for the Routing Engine module.
run the Product Barcode Import Errors Report	See the *Product Barcode Import Errors Report*. Used for the Routing Engine module.
run the Status Restricted Report	See the *Status Restricted Report*. Used for the Routing Engine module.
run the Unfulfillable Report	See the *Unfulfillable Report*. Used for the Routing Engine module.
run the Zone List Report	See the *Zone List Report*. Used for the Routing Engine module.

Option	Procedure
run the Invoice Detail Report	See the *Invoice Detail Report*. Used for the Supplier Direct Fulfillment module.
run the PO Item Status Report	See the *PO Item Status Report*. Used for the Supplier Direct Fulfillment module.
run the Vendor Aging Detail Report	See the *Vendor Aging Detail Report*. Used for the Supplier Direct Fulfillment module.
run the Vendor Aging Summary Report	See the *Vendor Aging Summary Report*. Used for the Supplier Direct Fulfillment module.

Fields at this screen

Fields	Description
Information on the selected report	A brief description of the selected report is displayed at the top of the screen when you highlight a report.
Report Name	*Drop Ship report:* Used for the Supplier Direct Fulfillment module. Available reports are: • *Invoice Detail Report* • *PO Item Status Report* • *Vendor Aging Detail Report* • *Vendor Aging Summary Report* *Operations report:* Used for the Routing Engine module. Available reports are: • *Auto Cancel Report* • *Location Import Errors Report* • *Order Status Report* • *Product Import Errors Report* • *Product Barcode Import Errors Report* • *Status Restricted Report* • *Unfulfillable Report* • *Zone List Report*
Report Description (unlabeled field)	A brief, system-provided description of the report.

Fields	Description
Left-hand navigation pane	Use this pane to select a report to run. Includes folders: • *Drop Ship:* Includes the Drop Ship reports provided for Order Broker's Supplier Direct Fulfillment module. • *Invoice Detail Report* • *PO Item Status Report* • *Vendor Aging Detail Report* • *Vendor Aging Summary Report* • *Operations:* Includes the Order Broker reports provided for Order Broker's Routing Engine module: • *Auto Cancel Report* • *Location Import Errors Report* • *Order Status Report* • *Product Import Errors Report* • *Product Barcode Import Errors Report* • *Status Restricted Report* • *Unfulfillable Report* • *Zone List Report*
Report Options	Not all options are provided for all Drop Ship and Operations reports. The field listings below indicate which reports use each option. Required fields are indicated with a red asterisk (*).
Organization	The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. Required for all Operations reports. **Used for:** All reports. Required for all.
Order Type	Optionally, select the *order type* to include on the Order Status Report or the Status Restricted Report, or leave this field blank to include all order types on the report. **Note:** The order types available for selection vary, depending on whether the selected organization supports ship-for-pickup orders. See *Enable Ship-For-Pickup?* for background. **Used for:** The *Order Status Report* and the *Status Restricted Report*.
Order Status	Optionally, select the *order status* to include orders in this status at the order level or line level on the Order Status Report or the Status Restricted Report, or leave this field blank to include all statuses on the report. If you use *splitting orders*, the report includes orders that match this status at either the order level or the line level. *Example:* An order includes a line in new order status, and another line in unfulfillable status. The order-level status is open. The order is included on the report if you select any of these statuses (new order, unfulfillable, or open) as a selection criterion. **Used for:** The *Order Status Report* and the *Status Restricted Report*.
Placed Location	Optionally, select the *placed location* to include on the Order Status Report or the Unfulfillable report, or leave this field blank to include all placed locations on the report. Only locations associated with the selected *organization* are available for selection. Applies to any order type. **Used for:** The *Order Status Report* and the *Unfulfillable Report*.

Fields	Description
Sourced Location	Optionally, select the *sourcing location* to include on the Order Status Report or the Unfulfillable report, or leave this field blank to include all sourced locations on the report. Only locations associated with the selected *organization* are available for selection. **Used for:** The *Order Status Report* and the *Unfulfillable Report*.
Pickup Location	Optionally, select the *pickup location* to include on the Order Status Report, Unfulfillable report, or Auto Cancel Report, or leave this field blank to include all pickup locations on the report. Only locations associated with the selected *organization* are available for selection. Applies to pickup or ship-for-pickup orders. **Used for:** The *Order Status Report*, the *Unfulfillable Report*, and the *Auto Cancel Report*.
Location	Optionally, select the *location* (primary or alternate) to include on the Zone List Report or the Status Restricted Report, or leave this field blank to include all locations on the report. Only locations associated with the selected *organization* are available for selection. **Used for:** The *Zone List Report*. Also used for the *Status Restricted Report* to restrict the report to Order Status Update requests submitted by a particular location.
Region	Optionally, select the region to include on the Order Status Report or the Auto Cancel Report, or leave this field blank to include all regions, and locations without an assigned region, on the report. **About regions:** The region is a user-defined field specified for a *location*. Prompt on this field to select from a list of all regions currently assigned to locations in the selected *organization*. **Used for:** The *Order Status Report* and the *Auto Cancel Report*. **Note:** You cannot generate a report based on any location fields and the region. If you select any of the location fields, the Region field becomes unselectable. Similarly, if you select a Region, the location fields become unselectable.
Ship Via	Optionally, enter the ship via to include on the Order Status Report, or leave this field blank to include all orders on the report regardless of the assigned ship via. **About ship vias:** The ship via code is a user-defined field passed in the `ship_via` element in the *submit order message*. It is displayed on the *Header* tab of the *Order* screen. This ship via does not necessarily match the Shipping Agent, listed at the History tab of the Order screen, which is typically the ship via that actually shipped the order. Must exactly match the ship via on the order header. For example, an entry of *FedEx* matches a ship via of *FedEx*; however, *Fed* is not a match. **Used for:** The *Order Status Report*.

Fields	Description
Vendor	Optionally, select a vendor to restrict the report to purchase orders or invoices for that vendor, or leave this field blank to include all purchase orders or invoices on the report regardless of the vendor. Vendors that have been *anonymized* are listed as asterisks. **Used for**: All Drop Ship reports.
Invoice Status	Optionally, select an *invoice status* to restrict the report to invoices that are currently in that status, or leave this field blank to include all invoices on the report regardless of status. **Used for:** The *Invoice Detail Report*.
Brand	Optionally, select a brand to restrict the report to purchase orders for that brand, or leave this field blank to include all purchase orders regardless of the brand. **Used for:** The *PO Item Status Report*, *Vendor Aging Detail Report*, and the *Vendor Aging Summary Report*.
Line Status	Optionally, select a purchase order line status to restrict the report to purchase orders that include lines that are currently in that status, or leave this field blank to include all purchase orders regardless of line status. When you generate the *PO Item Status Report*, selection options include any line status, including Shipped and Canceled; however, when you generate the *Vendor Aging Detail Report* or the *Vendor Aging Summary Report*, only open (Held, In Process, or New Order) statuses are available for selection. **Used for:** The *PO Item Status Report*, *Vendor Aging Detail Report*, and the *Vendor Aging Summary Report*.

Fields	Description
	How dates control the orders to include on Drop Ship and Operations reports: Selection is based on the date range as follows: • *Product Barcode Import Errors Report*, *Product Import Errors Report*, and *Location Import Errors Report*: the date when the import error occurred **Note:** Import errors that occurred on earlier dates are available to include on the *Location Import Errors Report*, *Product Import Errors Report*, and *Product Barcode Import Errors Report* only if they have not been cleared based on the Days to keep errors setting at the *Schedule Jobs* screen. See that screen for more information. • *Auto Cancel Report*: the most recent date when a line on the order was automatically canceled. • *Order Status Report*: the date when the order was created in Order Broker. • *Status Restricted Report*: the date when the Order Status Update request to change the line's status was received, and the transaction history record was created. • *Unfulfillable Report*: the date when the order or line became unfulfillable. Dates are not used for the *Zone List Report*. • *Invoice Detail Report*: The invoice date specified by the vendor. This may not be the same as the date when the vendor created the invoice. • *PO Item Status Report*: the `po_entered_date` specified in the *CreateDSOrder* message. This may not be the same as the date when the purchase order was sent to Order Broker. • *Vendor Aging Detail Report*: the current due date for the purchase order line. If the vendor has revised the due date, the revised date is used. The due date may be in the future. • *Vendor Aging Summary Report*: the current due date for the purchase order line. If the vendor has revised the due date, the revised date is used. The due date may be in the future.

Fields	Description
Rolling Dates	**About rolling dates:** When you select a rolling date option, Order Broker calculates the dates to include, so that you do not need to enter a *From* and *To* date; instead, the screen fills these dates in for you based on your selection. You can also use these dates when you schedule reports to produce the desired date range when Order Broker generates the reports on different dates. Required for the Import Error reports, the Order Status report, and Unfulfillable Reports and the Drop Ship reports if you do not enter a *From* and *To* date. See *Rolling date options* for details. **Used for:** The *Auto Cancel Report*, *Product Barcode Import Errors Report*, *Product Import Errors Report*, *Location Import Errors Report*, *Order Status Report*, *Status Restricted Report*, *Unfulfillable Report*, *PO Item Status Report*, *Vendor Aging Detail Report*, *Vendor Aging Summary Report*, and *Invoice Detail Report*. **Note:** Import errors that occurred on earlier dates are available to include on the *Location Import Errors Report*, *Product Import Errors Report*, and *Product Barcode Import Errors Report* only if they have not been cleared based on the Days to keep errors setting for the *Product Import*at the *Schedule Jobs* screen. See that screen for more information.
From	Specify the first order, activity, or due date to include in the report. Required if you do not select a *Rolling Dates* option. The From date cannot be earlier than the To date. **Used for:** The *Auto Cancel Report*, *Product Barcode Import Errors Report*, *Product Import Errors Report*, *Location Import Errors Report*, *Order Status Report*, *, Status Restricted Report, Unfulfillable Report*, *PO Item Status Report*, *Vendor Aging Detail Report*, *Vendor Aging Summary Report*, and *Invoice Detail Report*. **Note:** Import errors that occurred on earlier dates are available to include on the *Product Barcode Import Errors Report*, *Location Import Errors Report*, and *Product Import Errors Report* only if they have not been cleared based on the Days to keep errors setting for the *Product Import*at the *Schedule Jobs* screen. See that screen for more information.
To	Specify the last order, activity, or due date to include in the report. Required if you do not select a *Rolling Dates* option. The From date cannot be earlier than the To date. **Used for:** The *Auto Cancel Report*, *Product Barcode Import Errors Report*, *Product Import Errors Report*, *Location Import Errors Report*, *Order Status Report*, *Status Restricted Report*, *Unfulfillable Report*, *PO Item Status Report*, *Vendor Aging Detail Report*, *Vendor Aging Summary Report*, and *Invoice Detail Report*. **Note:** Import errors that occurred on earlier dates are available to include on the *Product Barcode Import Errors Report*, *Product Import Errors Report*, and *Location Import Errors Report* only if they have not been cleared based on the Days to keep errors setting for the *Product Import* at the *Schedule Jobs* screen. See that screen for more information.

Fields	Description
Export to PDF	Leave this flag selected to generate a PDF version of the report for review in a PDF viewer. The report opens in a separate tab within Order Broker and is available for review through the *View Reports* screen; also, the report is attached to the email for all email addresses specified in the *Email List*. Required if you do not select Export to Excel. You can export to PDF, export to CSV for a spreadsheet application, or both. **Used for:** All reports.
Export to Excel	Select this flag to generate an .XLSX version of the report that you can open in a spreadsheet application. The file is available for download when you generate the report, and is attached to the email for all email addresses specified in the *Email List*; also, a new tab opens indicating that the report is available in CSV for a spreadsheet application. Required if you do not select Export to PDF. You can export to PDF, export to CSV for a spreadsheet application, or both. **Note:** If you have difficulty opening the XLSX version of the report from the browser, save the report and then open in with your spreadsheet application. **Used for:** All reports.
Email List	Optionally, enter one or more email addresses to receive the generated report as an email attachment. Must be in the format of name@host.ext. If you select both the Export to PDF and Export to Excel flags, each email address receives two separate emails, each with one of the selected export formats attached. See the *Generated report email* for an example and more information. Separate each email address with a semicolon (;). Your entries can be up to 255 positions in total.

Rolling date options

You can use rolling date options to select the date range to include in the *Order Status Report* and *Unfulfillable Report* and the Drop Ship reports. You can select rolling date options at the *Run Reports* screen when you run reports interactively, and at the *Schedule Report* window for scheduled reports.

How dates control the orders to include on Drop Ship and Operations reports: Selection is based on the date range as follows:

- *Product Barcode Import Errors Report*, *Product Import Errors Report*, and *Location Import Errors Report*: the date when the import error occurred

> **Note:**
>
> Import errors that occurred on earlier dates are available to include on the *Product Barcode Import Errors Report*, *Product Import Errors Report*, and *Location Import Errors Report* only if they have not been cleared based on the Days to keep errors setting for the *Product Import* at the *Schedule Jobs* screen. See that screen for more information.

- *Auto Cancel Report*: the most recent date when a line on the order was automatically canceled.
- *Order Status Report*: the date when the order was created.

- *Status Restricted Report*: the date when the request to change the order status was received, and the transaction history record was created.
- *Unfulfillable Report*: the date when the order or line became unfulfillable.
- *Invoice Detail Report*: The invoice date specified by the vendor. This may not be the same as the date when the vendor created the invoice.
- *PO Item Status Report*: the `po_entered_date` specified in the *CreateDSOrder* message. This may not be the same as the date when the purchase order was sent to Order Broker.
- *Vendor Aging Detail Report*: the current due date for the purchase order line. If the vendor has revised the due date, the revised date is used. The date may be in the future.
- *Vendor Aging Summary Report*: the current due date for the purchase order line. If the vendor has revised the due date, the revised date is used.The date may be in the future.

Option	Report includes orders or activities that occurred during:	Example
Today	the current date.	Today = 9/19 Report includes 9/19
Yesterday	the previous date.	Today = 9/19 Report includes 9/18
Last Week	the previous week. For this calculation, the week starts on Monday and runs through Sunday.	Today = Wednesday 9/19 Report includes Monday 9/10 through Sunday 9/16
Last Month	the previous calendar month.	Today = 9/19 Report includes 8/1 through 8/31
Last Year	the previous calendar year.	Today = 9/17/17 Report includes 1/1/12 through 12/31/16
Last 30 Days	the most recent 30 days, including today.	Today = 9/17 Report includes 8/18 through 9/17
Last 60 Days	the most recent 60 days, including today.	Today = 9/17 Report includes 7/19 through 9/17
Last 90 Days	the most recent 90 days, including today.	Today = 9/17 Report includes 6/19 through 9/17
This Week	the current week (Monday through Sunday), including today.	Today = Thursday 9/20 Report includes 9/17 through 9/20
This Month	the current calendar month, including today.	Today = 9/17 Report includes 9/1 through 9/17

Option	Report includes orders or activities that occurred during:	Example
This Year	the current calendar year, including today.	Today = 9/17 Report includes 1/1 through 9/17
Future date ranges: The following future date ranges would typically be used for the *Vendor Aging Detail Report* or the *Vendor Aging Summary Report*, which are selected based on due date.		
Next 7 Days	the next 7 days, including the current date	Today = 11/17 Report includes 11/17 through 11/24
Next 30 Days	the next 30 days, including the current date	Today = 11/17 Report includes 11/17 through 12/17
Next 60 Days	the next 60 days, including the current date	Today - 11/17 Report includes 11/17 through 1/16
Next 90 Days	the next 90 days, including the current date	Today = 11/17 Report includes 11/17 through 2/15

Generated report email

Overview: Order Broker sends an email such as the following to each email address specified in the *Email List* when you generate the report dynamically through the *Run Reports* screen, and when the report runs automatically because you scheduled it with the *Schedule Report* window.

When you select both the Export to PDF and the Export to Excel options, each recipient in the *Email List* receives two emails: one containing the PDF file, and one containing the XLSX file.

The components of the email are:

Subject line	Indicates the report that was generated; for example, `Unfulfillable Report has been generated`
"From" email address	From the *From Email* specified at the *Event Logging* screen.
Report Date	The date when the report was generated.
Submitted By	The user ID of the person who submitted or scheduled the report.

Attachment	The PDF or XLSX version of the report. The file name is `ob_unfulfillable_report.ssmith.20171006.12345612.xlsx` where: • `ob_unfulfillable_report` is the name of the BI Publisher template file name • `ssmith` is the user ID of the person who generated the report, either dynamically at the *Run Reports* screen or who scheduled the report through the *Schedule Report* window • `20171006` is the date generated in YYYYMMDD format • `12345612` is the time generated in HHMMSSSS format (24-hour time) • `.xlsx` is the report format • If your email server blocks the PDF or XLSX files as suspicious attachments, the files could be renamed as Untitled.dat. You can save the file and assign it the correct extension (PDF or XLSX), or you can request that your system administrator add the Order Broker server to an allow list so that the attachments are no longer blocked. • If the report name before the file extension of pdf or xlsx exceeds 60 positions, it is truncated.

Schedule Reports

Purpose: Use the **Schedule Reports** screen to work with schedules you set up to have Order Broker automatically generate reports.

Example: You can schedule the *Unfulfillable Report* to run daily for individual locations, and also schedule the report to run weekly and include all locations. You can designate different email addresses to receive each version of the report.

Resolving a scheduling issue: If a report does not run as scheduled, you can use the *Reschedule All* option at the *View Active Schedules* screen to stop and restart the schedules for all jobs and periodic programs, such as report generation.

Note that the *Reschedule All* option does not restart jobs that are in Paused status (⊘). Jobs stay in Paused status only briefly before Order Broker restarts them automatically.

How to display this screen: Select *Schedule Reports* from the *Home Screen* or from the *Reports Menu*.

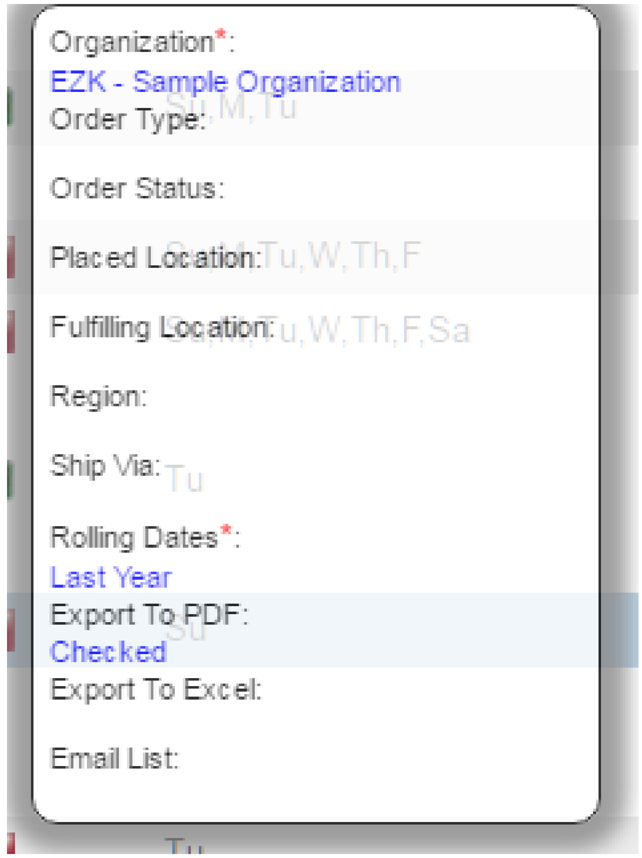
Note:

Only users with *Schedule Reports* authority can display this screen. See the *Role Wizard* for more information.

Options at the screen

Option	Procedure
create a new report schedule	1. Enter a name for the schedule in the *Schedule Name* field. The schedule name can be up to 50 positions and can include special characters and spaces. Each schedule name must be unique. 2. Select *Drop Ship* or *Operations* (Routing Engine). 3. Select the report you are scheduling from the *Report* field. This option is available only after you have selected the *Drop Ship* or *Operations* (Routing Engine) folder from the *Report Folder* field. 4. Click *New* to advance to the *Schedule Report* window, where you can complete creation of the report schedule.
search for a report schedule	**Options for searching:** • Enter a full or partial schedule name in the *Schedule Name* field and click *Search* to display report schedules that start with your entry or match it exactly. • Select *Drop Ship* or *Operations* (Routing Engine) from the *Report Folder* field and click *Search* to display schedules for reports in the selected folder. You can also combine this selection with an entry in the *Schedule Name* field to restrict matches to schedules in the selected folder. • Select *Drop Ship* or *Operations* (Routing Engine) from the *Report Folder* field, select a report from the *Report* field, and click *Search* to display schedules for the selected report. **Case:** Case-insensitive for searching; for example, an entry of `n` matches a report schedule of `New Orders`. **Options for sorting search results:** • Use the plus signs or minus signs next to the *Drop Ship* or *Operations* (Routing Engine) folders to expand or collapse report schedules within those folders. • Use the plus signs or minus signs next to a particular report to expand or collapse report schedules for that specific report. • Click the column headings to sort the displayed report schedules by the selected column.
activate a report schedule	Click the inactive icon ( ) next to a report schedule to activate it.
deactivate a report schedule	Click the active icon ( ) next to a report schedule to deactivate it.
edit an existing report schedule	Click the edit icon ( ) next to a report schedule to advance to the *Schedule Report* window.
delete a report schedule	Click the delete icon ( ) next to a scheduled report to delete the schedule.

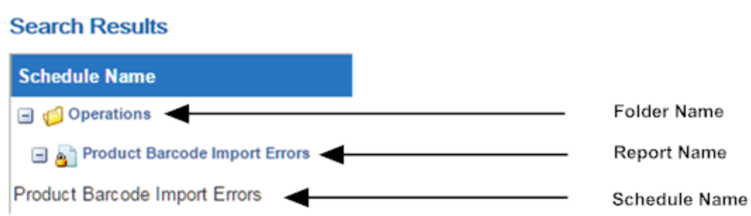
Option	Procedure
review a summary of the report schedule	Move the cursor over the active ( ) or inactive ( ) icon to display a summary of the report schedule. See the *Schedule Report* window for more information.



Fields at this screen

Fields	Description
Search/New Fields	
Schedule Name	Describes the schedule you create so that Order Broker can generate the report on a periodic basis, using the settings from the *Schedule Report* window. The schedule name can be up to 50 positions and can include special characters and spaces. You can create multiple schedules for a single report, with each schedule using different settings and running on different days of the week or at different times. For example, you can set up the *Order Status Report* to run on Monday morning at 7:00 and include all statuses and locations, and also set up the report to run every afternoon at 5:00 p.m. (17:00) for a specific location or status, and each schedule can have a different email distribution list. Case-insensitive for searching; for example, an entry of `n` matches a report schedule of `New Orders`.

Fields	Description
Report Folder	Available options are: • *Drop Ship:* Select this folder to create a schedule for, or to search for schedules for, one of the for Order Broker's Supplier Direct Fulfillment module: • *PO Item Status Report* • *Vendor Aging Detail Report* • *Vendor Aging Summary Report* • *Invoice Detail Report* • *Operations:* Select this folder to create a schedule for, or to search for schedules for, one of the reports for Order Broker's Routing Engine module: • *Auto Cancel Report* • *Location Import Errors Report* • *Order Status Report* • *Product Barcode Import Errors Report* • *Product Import Errors Report* • *Status Restricted Report* • *Unfulfillable Report* • *Zone List Report*
Report	You need to select the *Drop Ship* or *Operations* (Routing Engine) folder in the Report Folder field before you can select a specific report to create a schedule or search for schedules.
Results Fields	The left-hand part of this area of the screen includes: • the *Folder Name* (*Drop Ship* or *Operations*) • the *Report Name* • the *Schedule Name* Each of these fields is described below.



Fields	Description
Report Folders (unlabeled field)	• *Drop Ship:* Includes the reports provided with Order Broker's Supplier Direct Fulfillment module: • *Invoice Detail Report* • *PO Item Status Report* • *Vendor Aging Detail Report* • *Vendor Aging Summary Report* • *Operations:* Includes the Order Broker reports provided with Order Broker's Routing Engine module: • *Auto Cancel Report* • *Location Import Errors Report* • *Order Status Report* • *Product Barcode Import Errors Report* • *Product Import Errors Report* • *Status Restricted Report* • *Unfulfillable Report* • *Zone List Report*
Report Name (unlabeled field)	The report to generate using the options selected at the *Schedule Report* window.
Schedule Name	The name describing the schedule you created so that Order Broker can generate the report on a periodic basis, using the settings from the *Schedule Report* window. **Note:** The dates and times are based on the *retailer's time*, which may be different from your local time zone.
Last Updated	The most recent date and time when the report schedule was updated, or the date the schedule was created if it has never been updated. Format is based on the settings at the *User Profile Configuration* screen. The user ID of the person who created or most recently updated the schedule is to the right.
Last Run	The last date and time when Order Broker generated the report using this schedule. Format is based on the settings at the *User Profile Configuration* screen.

Fields	Description
Active	Indicates whether the schedule is active and eligible to be run: • = the schedule is inactive • = the schedule is active **Note:** Move the cursor over this icon to display a summary window with information about the schedule. See *review a summary of the report schedule* above for a sample.
Schedule Days	The day(s) of the week for Order Broker to generate the report using the settings from the *Schedule Report* window: • Su = Sunday • M = Monday • Tu = Tuesday • W = Wednesday • Th = Thursday • F = Friday • Sa = Saturday
Schedule Times	The time on the selected days when Order Broker should generate the report using the settings from the *Schedule Report* window. Format is based on the settings at the *User Profile Configuration* screen. If there is more than one time specified, the word *Multiple* is displayed.
Edit	Click the edit icon ( ) next to a report schedule to open the *Schedule Report* window, where you can review or change the report schedule.
Delete	Click the delete icon ( ) next to a report schedule to delete the schedule.

Schedule Report

Purpose: Use the **Schedule Report** window to create or change a schedule for a Drop Ship or Operations (Routing Engine) report.

Fields can vary: The fields available at this screen vary depending on the report, and are described in the field descriptions below.

Creating multiple schedules for a report: You can create multiple schedules for a single report. For example, you might want to generate reports of open orders assigned to different fulfilling locations, and send the reports by email to different staff members.

Time zone: The dates and times are based on the *retailer's time*, which may be different from your local time zone.

How to display:

- Create a new schedule at the *Schedule Reports* screen, or
- Select the edit icon ( ) for an existing schedule at the *Schedule Reports* screen

> **Note:**
>
> You can also review a summary of the report schedule by moving the cursor over the active ( ) or inactive ( ) icon at the *Schedule Reports* screen.

Creating or editing a schedule: Enter or change the information at this window and click *Save*. See the field descriptions below for more information.

Fields at this window

Fields	Description
Report Name	*Drop Ship report:* • *Invoice Detail Report* • *PO Item Status Report* • *Vendor Aging Detail Report* • *Vendor Aging Summary Report* *Operations (Routing Engine) report:* • *Auto Cancel Report* • *Location Import Errors Report* • *Order Status Report* • *Product Barcode Import Errors Report* • *Product Import Errors Report* • *Status Restricted Report* • *Unfulfillable Report* • *Zone List Report*
Schedule Name	Enter a name to describe the schedule you have created so that Order Broker can generate the report on a periodic basis, using the settings from the *Schedule Report* window. The schedule name can be up to 50 positions and can include special characters and spaces. Required. You can create multiple schedules for a single report, with each schedule using different settings and running on different days of the week or at different times, and sent to different email distribution lists.
Report Options	Not all options are available for all reports. The field listings below indicate which reports use each option. Required fields are indicated with a red asterisk (*).
Organization	The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. Required for all Operations reports. **Used for:** All reports. Required for all.

Fields	Description
Order Type	Optionally, select the *order type* to include on the Order Status Report, or leave this field blank to include all order types on the report. **Note:** The order types available for selection vary, depending on whether the selected organization supports ship-for-pickup orders. See *Enable Ship-For-Pickup?* for background. **Used for:** The *Order Status Report*, the *Auto Cancel Report*, and the *Status Restricted Report*.
Order Status	Optionally, select the *order status* to include orders with this status on the order level or line level on the Order Status Report, or leave this field blank to include all statuses on the report. If you use *splitting orders*, the report also includes orders that have lines in this status. *Example:* An order includes a line in new order status, and another line in unfulfillable status. The order-level status is open. The order is included on the report if you select any of these statuses (new order, unfulfillable, or open) as a selection criterion. **Used for:** The *Order Status Report* and the *Status Restricted Report*.
Placed Location	Optionally, select the *placed location* to include on the Order Status Report or the Unfulfillable report, or leave this field blank to include all placed (originating) locations on the report. Only locations associated with the selected *Organization* are available for selection. Applies to any order type. **Used for:** The *Order Status Report* and the *Unfulfillable Report*.
Sourced Location	Optionally, select the *sourcing location* to include on the Order Status Report or the Unfulfillable report, or leave this field blank to include all sourced locations on the report. Only locations associated with the selected *organization* are available for selection. **Used for:** The *Order Status Report* and the *Unfulfillable Report*.
Pickup Location	Optionally, select the *pickup location* to include on the Order Status Report or the Unfulfillable report, or leave this field blank to include all pickup locations on the report. Only locations associated with the selected *organization* are available for selection. Applies to pickup or ship-for-pickup orders. **Used for:** The *Order Status Report*, the *Unfulfillable Report*, and the *Auto Cancel Report*.
Location	Optionally, select the *location* (primary or alternate) to include on the Zone List Report, or leave this field blank to include all locations on the report. **Used for:** The *Zone List Report* and the *Status Restricted Report*.
Region	Optionally, select the region to include on the Order Status Report, or leave this field blank to include all regions, and locations without an assigned region, on the report. **About regions:** The region is a user-defined field specified for a *location*. Prompt on this field to select from a list of all regions currently assigned to locations in the selected *organization*. **Used for:** The *Order Status Report* and the *Auto Cancel Report*.

Fields	Description
	Note: You cannot generate a report based on any location fields and region. If you select any of the location fields, the Region field becomes unselectable. Similarly, if you select a Region, the location fields become unselectable.
Ship Via	Optionally, enter the ship via to include on the Order Status Report, or leave this field blank to include all orders on the report regardless of the assigned ship via. **About ship vias:** The ship via code is a user-defined field passed in the `ship_via` element in the *submit order message*. It is displayed on the *Header* tab of the *Order* screen. **Used for:** The *Order Status Report*.
Vendor	Optionally, select a vendor to restrict the report to purchase orders or invoices for that vendor, or leave this field blank to include all purchase orders or invoices on the report regardless of the vendor. Vendors that have been *anonymized* are listed as asterisks. **Used for**: All Drop Ship reports.
Brand	Optionally, select a brand to restrict the report to purchase orders for that brand, or leave this field blank to include all purchase orders regardless of the brand. **Used for:** The *PO Item Status Report*, *Vendor Aging Detail Report*, and the *Vendor Aging Summary Report*.
Line Status	Optionally, select a purchase order line status to restrict the report to purchase orders that include lines that are currently in that status, or leave this field blank to include all purchase orders regardless of line status. When you generate the *PO Item Status Report*, selection options include any line status, including Shipped and Canceled; however, when you generate the *Vendor Aging Detail Report* or the *Vendor Aging Summary Report*, only open (Held, In Process, or New Order) statuses are available for selection. **Used for:** The *PO Item Status Report*, *Vendor Aging Detail Report*, and the *Vendor Aging Summary Report*.
Invoice Status	Optionally, select an invoice status to restrict the report to invoices that are currently in that status, or leave this field blank to include all invoices on the report regardless of status. **Used for:** The *Invoice Detail Report*.

Fields	Description
	How dates control the orders to include on reports: Selection is based on the date range as follows: • *Auto Cancel Report*: the most recent date when a line on the order was canceled • *Product Barcode Import Errors Report*, *Product Import Errors Report*, and *Location Import Errors Report*: the date when the import error occurred **Note:** Import errors that occurred on earlier dates are available to include on the *Location Import Errors Report*, *Product Import Errors Report*, and *Product Barcode Import Errors Report* only if they have not been cleared based on the Days to keep errors setting for the *Product Import* at the *Schedule Jobs* screen. See that screen for more information. • *Order Status Report*: the date when the order was created • *Status Restricted Report*: the date when the request to change the order line status was received, and the transaction history record was created. • *Unfulfillable Report*: the date when the order or line became unfulfillable • *PO Item Status Report*: the `po_entered_date` specified in the *CreateDSOrder* message. This may not be the same as the date when the purchase order was sent to Order Broker. • *Invoice Detail Report*: The invoice date specified by the vendor. This may not be the same as the date when the vendor created the invoice. • *Vendor Aging Detail Report*: the current due date for the purchase order line. If the vendor has revised the due date, the revised date is used. • *Vendor Aging Summary Report*: the current due date for the purchase order line. If the vendor has revised the due date, the revised date is used.
Rolling Dates	**About rolling dates:** When you select a rolling date option, Order Broker calculates the dates to include. See *Rolling date options* for details. **Used for:** The *Auto Cancel Report*, *Product Barcode Import Errors Report*, *Product Import Errors Report*, *Location Import Errors Report*, *Order Status Report*, *Status Restricted Report*, *Unfulfillable Report*, *PO Item Status Report*, *Vendor Aging Detail Report*, *Vendor Aging Summary Report*, and *Invoice Detail Report*.
Export to PDF	Leave this flag selected to generate a PDF version of the report in a PDF viewer. Required if you do not select Export to Excel. You can export to PDF, export to CSV for a spreadsheet application, or export to both. **Used for:** All reports.

Fields	Description
Export to Excel	Select this flag to generate an .XLSX version of the report that you can open in a spreadsheet application. Required if you do not select Export to PDF. You can export to PDF, export CSV for a spreadsheet application, or both. **Used for:** All reports.
Email List	Optionally, enter one or more email addresses to receive the generated report as an email attachment. Must be in the format of name@host.ext. If you select both the Export to PDF and Export to Excel flags, each email address receives two separate emails, each with one of the selected export formats attached. See the *Generated report email* for an example and more information. Separate each email address with a semicolon (;). Your entries can be up to 255 positions in total. • The summary window available at the *Schedule Reports* screen displays the word *Multiple* if there is more than one email address listed for a report schedule. • If your email server blocks the PDF or XLSX files as suspicious attachments, the files could be renamed as Untitled.dat. You can save the file and assign it the correct extension (PDF or XLSX), or you can request that your system administrator add the Order Broker server to an allow list so that the attachments are no longer blocked.
Schedule Interval	Use these fields to specify whether to run a report automatically using the selected settings, and the day(s) and time(s) when the report should run. For an existing schedule, the last time you updated the schedule and the last time the report was run are displayed at the bottom of the window.
Activate Schedule	Select this field to activate the schedule so that Order Broker will generate the report at the selected day(s) and time(s), or leave this field unselected if you do not want to have Order Broker generate the report according to this schedule. You can also activate a schedule by clicking the inactive icon ( ) at the *Schedule Reports* screen, or deactivate a schedule by clicking the active icon ( ) at the *Schedule Reports* screen. **Locale:** The current locale used to control the language displayed on screens and in reports is indicated to the right of this field. The default locale is *en* (English). Contact your Oracle representative for information on changing the locale.
Day of Week	Select each day of the week when Order Broker should automatically generate the report using the selected settings. At least one day is required when you set up a schedule, although you do not need to activate the schedule.

Note:

The dates and times are based on the *retailer's time*, which may be different from your local time zone.

Fields	Description
Time	Enter one or more times, in HH:MM (24-hour) format when the report should run on each of the selected days of the week. The hour and minute entries should be zero-filled so they are each 2 positions: for example, `08:01` rather than `8:01`. Separate multiple times with a comma but no space: for example, `08:00,12:00,18:00`. At least one time is required, although you do not need to activate the schedule.
Last Updated	The most recent date and time when the report schedule was updated, or the date the schedule was created if it has never been updated. Format is based on the settings at the *User Profile Configuration* screen. The user ID of the person who created the schedule is to the right.
Last Run	The most recent date and time when Order Broker generated the report using the selected settings. Format is based on the settings at the *User Profile Configuration* screen.

View Reports

Purpose: Use the **View Reports** screen to review reports generated previously, whether they were run dynamically at the *Run Reports* screen or automatically on a scheduled basis through the *Schedule Report* window.

Reports available regardless of whether emailed: Regardless of whether you select the *Email List* option at the *Run Reports* screen or the *Schedule Report* window, the reports are still available at this screen.

How long are reports retained? The File Storage setting in the *Retention Settings* section of the *Tenant* screen defines how long to retain generated report files until they are eligible to be deleted automatically by the *daily cleanup job*.

How to display this screen: Select *View Reports* from the *Home Screen* or from the *Reports Menu*.

Note:

Only users with *View Reports* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>search for a report</td><td>Use the search fields to search for reports across the Drop Ship and Operations (Routing Engine) folders. Optionally:
Enter a full or partial Report Name to display reports that begin with your entry or match it exactly.
Select a Report Date to display reports that you generated on that date, either on demand at the Run Reports screen or by scheduling the report through the Schedule Report window.
The Submitted By field defaults to your user ID. Clear this field to display reports generated by all users, or enter a different user ID to display reports generated by the specified user.
Click Search.

Case: The Report Name is case-insensitive for searching; for example, an entry of <code>order</code> matches a report name starting with <code>Order</code>. However, the Submitted By field is case-sensitive for searching; for example, an entry of <code>JSMITH</code> does not match a user ID of <code>jsmith</code>.

You can also:
Click the minus sign next to the Drop Ship or Operations (Routing Engine) folder to collapse a folder. These folders are open by default, displaying all generated reports for the user ID in the Submitted By field.
Sort the displayed reports by clicking the column heading. For example, click the Report Name column heading to display reports in alphabetical order by name.</td></tr>
<tr><td>view a PDF version of a report</td><td>Click the PDF icon ( ) to open the generated report in your browser using a PDF viewer. You can then use your browser’s standard options to print or save a copy of the generated report. A PDF version is available only if you selected the Export to PDF option at the Run Reports screen or the Schedule Report window.

Default program? The report opens in a PDF viewer only if it is the default program associated with the PDF file extension.</td></tr>
</table>

Option	Procedure
download an XLSX version of a report	Click the spreadsheet icon ( ) to download the XLSX file for review in a spreadsheet application. A spreadsheet version is available only if you selected the Export to Excel option at the *Run Reports* screen or the *Schedule Report* window. **Note:** If you have difficulty opening the XLSX file of the report from the browser, save the report file and then open it with your spreadsheet application.
delete a generated report	Click the delete icon ( ) to delete the generated report. **How long are reports retained?** The File Storage setting in the *Retention Settings* section of the *Tenant* screen defines how long to retain generated report files until they are eligible to be deleted automatically by the daily cleanup process.

Fields at this screen

Fields	Description
Search Fields	
Report Name	Optionally, enter a full or partial report name to display reports from either folder that begin with your entry or match it exactly. The names of Drop Ship reports delivered with Order Broker's Supplier Direct Fulfillment module are: • *Invoice Detail Report* • *PO Item Status Report* • *Vendor Aging Detail Report* • *Vendor Aging Summary Report* The names of Order Broker operations reports delivered with Order Broker's Routing Engine module are: • *Auto Cancel Report* • *Location Import Errors Report* • *Order Status Report* • *Product Barcode Import Errors Report* • *Product Import Errors Report* • *Status Restricted Report* • *Unfulfillable Report* • *Zone List Report* Case-insensitive for searching; for example, an entry of `order` matches a report name starting with `Order`.

Fields	Description
Report Date	Optionally, enter or select a date to display reports generated on that date.
Submitted By	Optionally, enter a complete, valid user ID to display reports generated by that user. Case-sensitive for searching; for example, an entry of `JSMITH` does not match a user ID of `jsmith`.
Search Results	
Report Folder	Optionally, click the plus sign next to a folder to expand or click the minus sign to collapse it. When you first advance to the screen, the folders are expanded: • *Drop Ship:* Includes the Drop Ship reports provided with Order Broker's Supplier Direct Fulfillment module: • *Invoice Detail Report* • *PO Item Status Report* • *Vendor Aging Detail Report* • *Vendor Aging Summary Report* • *Operations:* Includes the Order Broker reports provided with Order Broker's Routing Engine module: • *Auto Cancel Report* • *Location Import Errors Report* • *Order Status Report* • *Product Barcode Import Errors Report* • *Product Import Errors Report* • *Status Restricted Report* • *Unfulfillable Report* • *Zone List Report*
Report Name	The names of Drop Ship reports delivered with Order Broker's Supplier Direct Fulfillment module are: 1. *Invoice Detail Report* 2. *PO Item Status Report* 3. *Vendor Aging Detail Report* 4. *Vendor Aging Summary Report* The names of Order Broker operations reports delivered with Order Broker's Routing Engine module are: • *Auto Cancel Report* • *Location Import Errors Report* • *Order Status Report* • *Product Barcode Import Errors Report* • *Product Import Errors Report* • *Status Restricted Report* • *Unfulfillable Report* • *Zone List Report*
Report Date	The date and time when the version of the report was generated, either dynamically at the *Run Reports* screen or automatically on a scheduled basis through the *Schedule Report* window. Format is based on the settings at the *User Profile Configuration* screen.

Fields	Description
Submitted By	The user ID of the person who submitted the report dynamically from the *Run Reports* screen or scheduled the report through the *Schedule Report* window.
PDF File	Click the PDF icon ( ) to open the generated report in your browser using a PDF viewer. You can then use your browser's standard options to print or save a copy of the generated report. A PDF version is available only if you selected the Export to PDF option at the *Run Reports* screen or the *Schedule Report* window. **Default program?** The report opens in a PDF viewer only if it is the default program associated with the PDF file extension.
Size (kB)	The total file size, in kilobytes, of the generated report. No number is listed when you generate the XLSX file but not the PDF file.
Excel File	Click the spreadsheet icon ( ) to download the XLSX file to open in a spreadsheet application. A spreadsheet version is available only if you selected the Export to Excel option at the *Run Reports* screen or the *Schedule Report* window. **Note:** If you have difficulty opening the XLSX version of the report from the browser, save the report and then open in with your spreadsheet application.
Delete	Click the delete icon ( ) to delete the generated report. **How long are reports retained?** The File Storage setting in the *Retention Settings* section of the *Tenant* screen defines how long to retain generated report files until they are eligible to be deleted automatically by the daily cleanup process.

Auto Cancel Report

Purpose: Use the **Auto Cancel Report** to generate a list of Order Broker orders that include any lines that have been automatically canceled. The information on the report includes the customer's name, email address, and phone numbers, as well as the type of order.

Order types on the report: This report lists pickup orders or ship-for-pickup orders that include lines that were automatically canceled.

Automatically canceled lines only: Order lines that were canceled by an integrated system, through order inquiry, or in Store Connect do not cause the order to be listed on this report. There is an auto-canceled flag that indicates that the line was canceled through the *Auto Cancel Unclaimed Pickup Orders* scheduled job; only order lines that have this flag selected cause an order to be listed on the report.

Does not include future cancellations: Order lines that are eligible for auto-cancellation do not cause the order to be listed on the report. Only order lines that have already been canceled cause the order to be listed.

If multiple auto-canceled lines: If an order includes more than one line that was automatically canceled during the date range and other criteria selected for the report, it is listed just once on the report, with the most recent cancellation date indicated.

For more information: See *Auto-Cancel Unclaimed Orders* for background.

Used for the Routing Engine module.

How to generate this report: At the *Run Reports* screen:

- Click the plus sign next to the *Operations* folder in the left-hand navigation pane.
- Highlight the *Auto Cancel Report*. The center of the screen displays the related *Report Options*.
- Select:
  - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The data formats defined for the organization's locale are used on the report.
  - Pickup Location: Optionally, select a single *location* to select only orders that were assigned to that location for pickup. Only locations associated with the selected *organization* are available for selection. Otherwise, leave this field blank to include orders with any automatically canceled lines regardless of the selected pickup location.
  - Region: Optionally, select a single *Region* to have the report include only orders with locations assigned to that region. Regions that are assigned to locations associated with the selected organization are available for selection. The region is a user-defined field specified for a location. Because this is a user-defined field, a region entered with any trailing blank spaces is not a match for the same region entered without the trailing blanks.
  - Date range: Select either:
    * Rolling Dates: One of the date ranges available from this field to include orders that include any lines that were automatically canceled during this range of dates. See *Rolling Dates* for more information; or,
    * From and To dates: Enter or select the first and last dates to include. The report includes orders that include lines that were automatically canceled during this range of dates. The From and To dates can be the same, and can be the current date.
- Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
- Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

- Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

- Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are from the data formats defined for the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the customer's email address exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading:
  - Locations: If a specific pickup location was selected to include on the report, this location code and name is listed; otherwise, the heading lists *All*.
  - Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window.
  - Region: If a specific region was selected to include on the report, this region is listed; otherwise, the heading lists *All*.
- The location code and name for each pickup location included on the report. For each order that includes any lines that were automatically canceled during the date range for this pickup location:
  - *Request ID* assigned by Order Broker.
  - *Order Number* assigned by the originating system.
  - Date Canceled: The date when an order line was canceled. If lines were canceled on multiple dates, this is the most recent date.
  - Customer Name: The sold-to customer's first and last name, if both were passed in the *submit order message*; otherwise, this is the company name.
  - Email address: The email address passed for the sold-to customer in the *submit order message*. Truncated if it exceeds the allotted space.
  - Day phone: The first phone number passed for the sold-to customer in the *submit order message* (`phone1`). Up to 12 positions.
  - Evening: The second phone number passed for the sold-to customer in the *submit order message* (`phone2`). Up to 12 positions.

> **Note:**
>
> Order Broker does not apply any formatting to the phone numbers passed in the submit order message.

- Order Type: Possible order types on the report are:
  - *Pickup:* See *pickup order*.
  - *Ship-for-pickup:* See *ship-for-pickup order*.

The footer on each page of the report lists:

- the date and time when the report was generated
- the current page number and total number of pages (for example, *Page 1 of 6*)

Location Import Errors Report

Purpose: Use the **Location Import Errors Report** to review errors related to locations that occurred during the import into Order Broker using the process described under *Importing Locations through File Storage API*. You can schedule imports or run them on demand through the *Schedule Jobs* screen.

Successfully imported locations not listed: Only location import records that resulted in error are listed on the report. For example, if the import process included 500 locations, and 495 locations were created or updated without error, the report lists the 5 errors.

Invalid address? The import process creates a location record even if the address specified in the import file is incomplete or invalid. In this case, the location is not listed on the errors report. If the location is not included as expected in inventory search results or order assignments, you can use the *Edit Location* to verify or correct the address.

Correcting import errors: See *Understanding location import errors* for more information.

Database table: The errors listed on this report are from the location_import table. Records in that table with a processed code of *40* are not included in the report, as these updates processed successfully.

For more information: See *Importing Locations through File Storage API*.

Used for the Routing Engine module.

How to generate this report: Available if Use Routing Engine is selected at the *Tenant* screen. At the *Run Reports* screen:

1. Click the plus sign next to the *Operations* folder in the left-hand navigation pane.
2. Highlight the *Location Import Errors Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The data formats defined for the organization’s locale are used on the report.

- Date range: Select either:
  – Rolling Dates: One of the date ranges available from this field to include location imports that failed during this range of dates. See *Rolling Dates* for more information; or,
  – From and To dates: Enter or select the first and last dates to include. The report includes location imports that failed during this range of dates. The From and To dates can be the same, and can be the current date.

> **Note:**
>
> **Note:** If the error occurred earlier than the Days to Keep Errors specified for the *Product Import* at the *Schedule Jobs* screen, it is not retained in the table or eligible to print on the report.

  – Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
  – Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

  – Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are from the data formats defined for the organization’s locale.

Contents:

- Organization Name and report title
- Report Criteria heading:
  – Locations: *All*.
  – Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window.
- *Import ID*. Each import ID starts on a new page.
- *System* code

- For each error with the same *Import ID*:

  Location code: The *location* to import from the external system.

  Location type: The *location type* assigned to the location, describing one or more locations within an organization. Each location type indicates the location category (store, warehouse, or vendor), and can also provide additional information, such as “East Coast Stores” or “Outlet Stores.”

  – Name: The name of the location.
  – City: The city for the location’s address.
  – State: The state for the location’s address.
  – Postal: The postal code for the location’s address.
  – Country Code: The country code for the location’s address.
  – Error: See *Understanding location import errors*.

The footer on each page of the report lists:

- the date and time when the report was generated
- the current page number and total number of pages (for example, *Page 1 of 6*)

The data formats defined for the organization’s locale control the formatting of the report.

Understanding location import errors

Error Code	Error Message	Possible Reasons
10	`System Record Not Found`	The *System* code specified is invalid. This error does not occur for *OCDS or Merchandising Omni Services Imports*, because the import is always scheduled or run on demand for a specific system, and this is the system code that is used. An invalid system code can also occur if the field exceeded the maximum allowed length. In this case, the description of the error in the error file is `System code length`.
55	Location Type Code Invalid	The *location type* code specified is invalid. This error does not occur for *OCDS or Merchandising Omni Services Imports*, because the import is always scheduled or run on demand for a specific store or warehouse default location type, as specified at the *OCDS Integration tab* of the **System** screen. In this case, the description of the error in the error file is `Location_type_code length`.

Error Code	Error Message	Possible Reasons
56	Locations Import Failed - Other Error	Can indicate that a field exceeded the maximum allowed length. In this case, the description of the error is included in the error file, for example `Address_line one too long`. Also, if a single-position code, such as the Active flag or the Delivery flag, was not set to a valid value, an example of the description of the error in the error file is `Q is Invalid for Column Active`. The following errors are not included on the report, but they are included in the import error file.
71	Missing Location Name	The location *Name* is missing and is a required field. This error occurs if the location name is passed as blank from OCDS or Merchandising Omni Services.
72	Missing Location Code	The *location* code is missing and is a required field. This error occurs if the location code is passed as blank from OCDS or Merchandising Omni Services.
73	Prov,Country,Postal combination invalid	There was a problem with the state or province, country, and postal code or zip code for the location.
75	The Address combination is invalid.	An error was returned through the *Oracle Maps Cloud Service*; however, the location was still created. This error can occur, for example, when a five-position postal code is passed for a Canadian address.

> **Note:**
>
> No errors are listed on the report if the number of columns in the flat file is invalid. In this case, a general error is listed at the *Product Imports History* screen. See *Importing Locations through File Storage API* for background.

Order Status Report

Purpose: Use the **Order Status Report** to generate a list of Order Broker orders created within a certain date range, indicating their current status.

Used for the Routing Engine module.

Selection options: Optionally, you can restrict the orders on the report by:

- order type
- order or line status
- placed (originating) location

- sourced location for a delivery, pickup, or ship-for-pickup order
- pickup location for a pickup or ship-for-pickup order, if the selected organization supports ship-for-pickup orders (see *Enable Ship-For-Pickup?* for background)
- region assigned to a location currently associated with the order
- ship via on the order

How to generate this report: At the *Run Reports* screen:

1. Click the plus sign next to the *Operations* folder in the left-hand navigation pane.
2. Highlight the *Order Status Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The data formats defined for the organization's locale are used on the report.
   - Order Type: Optionally, select a single *order type* to have the report include only orders of that type. Otherwise, leave this field blank to include all eligible orders regardless of type.
   - Order Status: Optionally, select a single order status to have the report include only orders of that status, and orders that include lines of that status if you use *splitting orders*. See *Order and Line Statuses* for background. Otherwise, leave this field blank to include all eligible orders regardless of status.

     Example: An order includes a line in new order status, and another line in unfulfillable status. The order-level status is open. The order is included on the report if you select any of these statuses (new order, unfulfillable, or open) as a selection criterion.
   - Placed Location: Optionally, select a single *location* to have the report include only orders that originated in that location. Only locations associated with the selected *organization* are available for selection. Otherwise, leave this field blank to include eligible orders originating in all locations in the organization.
   - Fulfilling Location: Optionally, select a single *location* to have the report include only orders that include at least one line that is currently assigned to that location for fulfillment or pickup. Only locations associated with the selected *organization* are available for selection. Otherwise, leave this field blank to include eligible orders regardless of where they are assigned. **Note:** This field is displayed only if the selected organization does not support ship-for-pickup orders. See *Enable Ship-For-Pickup?* for background.
   - Sourced Location: Optionally, select a single *location* to have the report include only ship-for-pickup orders that are currently assigned to the specified location as a *sourcing location*. Only locations associated with the selected *organization* are available for selection. Otherwise, leave this field blank to include eligible orders assigned to any locations in the organization. **Note:** This field is displayed only if the selected organization supports ship-for-pickup orders; see *Enable Ship-For-Pickup?* for background.
   - Pickup Location: Optionally, select a single *location* to have the report include only ship-for-pickup orders that are currently assigned to the specified location as a *pickup location*. Only locations associated with the selected *organization* are available for selection. Otherwise, leave this field blank to include eligible

orders assigned to any locations in the organization. **Note:** This field is displayed only if the selected organization supports ship-for-pickup orders; see *Enable Ship-For-Pickup?* for background.

- Region: Optionally, select a single *Region* to have the report include only orders with locations assigned to that region. Regions that are assigned to locations associated with the selected organization are available for selection. The region is a user-defined field specified for a location. Because this is a user-defined field, a region entered with any trailing blank spaces is not a match for the same region entered without the trailing blanks.

> **Note:**
>
> You cannot generate the report based on any location fields and the region. If you select any of the location fields, the Region field becomes unselectable. Similarly, if you select a Region, the location fields become unselectable.

- Ship Via: Optionally, enter a single *Ship Via* to have the report include only orders that have this ship via assigned at the order level.

> **Note:**
>
> The ship via code is a user-defined field passed in the `ship_via` element in the *submit order message*. It is displayed on the *Header* tab of the *Order* screen. This ship via does not necessarily match the Shipping Agent, listed at the History tab of the **Order** screen, which is typically the ship via that actually shipped the order.

- Date range: Select either:
  - Rolling Dates: Select one of the date ranges available from this field to include orders that were created in Order Broker during this range of dates. (This date might not be the same as the *Date Ordered* listed at the *Order Inquiry* screen.) See *Rolling Dates* for more information on rolling date options); or,
  - From and To dates: Enter or select the first and last dates to include. The report includes orders that were created in Order Broker during this range of dates. The From and To dates can be the same, and can be the current date.
- Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
- Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

- Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are from the data formats defined for the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the customer name exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading: Each of the selection options entered at the *Run Reports* screen or the *Schedule Report* window is indicated here. The report lists *All* for each option that you did not select as a restriction.
  - Order Type
  - Order Status

    > **Note:**
    >
    > If you selected a status as a selection criterion and the order is split, the order-level status might not match the status you selected. For example, an order includes a line in new order status, and another line in unfulfillable status. The order-level status is open. The order is included on the report if you select any of these statuses (new order, unfulfillable, or open) as a selection criterion.

  - Placed Location
  - Fulfill Location (listed only if the organization does not support ship-for-pickup orders)
  - Sourced Location (listed only if the organization supports ship-for-pickup orders)
  - Pickup Location (listed only if the organization supports ship-for-pickup orders)
  - Region

    > **Note:**
    >
    > See *Enable Ship-For-Pickup?* for background.

  - Ship Via

  - Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window

For each order included on the report:

- Order Type: Each *order type* starts on a new page and lists the following information for each order:
  - Request ID: The *request ID* assigned by Order Broker to identify the order.
  - Order #: The *order number* assigned by the originating system.
  - Order Status: The current order status. See *Order and Line Statuses* for more information.
  - Ship Via: The *Ship Via* code and description, separated by a hyphen, currently assigned to the order. Up to 18 positions.
  - Date Created: The date when the order was created in Order Broker. This date might not be the same as the *Date Ordered* listed at the *Order Inquiry* screen. The report includes orders that were created in Order Broker within the range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window.
  - Customer Name: The sold-to customer's first and last name, if both were passed in the *submit order message*; otherwise, this is the company name. Up to 21 positions. Asterisks print if the customer has been *anonymized*.
  - If the organization does not support ship-for-pickup orders:
    - Placed Location: the placed (originating) location code and name, separated by a hyphen (for example, 1 - Main Distribution Center).
    - Fulfilling Location: the current fulfilling location code and name, separated by a hyphen (for example, 1 - Main Distribution Center). The word *Multiple* indicates that the order is split across multiple fulfilling locations.
  - Locations (if the organization supports ship-for-pickup orders):
    - Placed Location: the placed (originating) location code and name, separated by a hyphen (for example, 1 - Main Distribution Center). Included for a *pickup order*, *delivery order*, or *ship-for-pickup order*.
    - Sourced Location: the *sourcing location* code and name, separated by a hyphen (for example, 1 - Main Distribution Center). Included for a *pickup order* or *ship-for-pickup order*. The word *Multiple* indicates that the order is split across multiple sourced locations. In the case of a *pickup order*, the sourced location is also where the order is picked up.
    - Pickup Location: the current fulfilling location code and name, separated by a hyphen (for example, 1 - Main Distribution Center). Included for a *ship-for-pickup order*.
    - Shipment Location: the current *sourcing location* code and name, separated by a hyphen (for example, 1 - Main Distribution Center). The word *Multiple* indicates that the order is split across multiple sourced locations. Included for a *delivery order*.
- Count: The total number of separate orders of the order type in Order Broker. For this report, each *request ID* is considered a separate order, even if they share the same *order number* from the originating system.

The footer on each page of the report lists:

- the date and time when the report was generated
- the current page number and total number of pages (for example, *Page 1 of 6*)

The data formats defined for the organization's locale control the formatting of the report.

Product Barcode Import Errors Report

Purpose: Use the **Product Barcode Import Errors Report** to review errors related to product UPC barcodes that occurred during the import into Order Broker using the process described under *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database*, or through *OCDS or Merchandising Omni Services Imports*. You can schedule imports or run them on demand through the *Schedule Jobs* screen.

Successfully imported product barcodes not listed: Only product UPC barcode import records that resulted in error are listed on the report. For example, if the import process included 500 product UPC barcodes, and 495 product UPC barcodes were created or updated without error, the report lists the 5 errors.

Correcting import errors: See *Understanding product UPC barcode import errors* for more information.

Database table: The errors listed on this report are from the PRODUCT_BARCODE_IMPORT table.

For more information: See *Importing UPC Barcodes through File Storage API*.

Used for the Routing Engine module.

How to generate this report: Available if Use Routing Engine is selected at the *Tenant* screen. At the *Run Reports* screen:

1. Click the plus sign next to the *Operations* folder in the left-hand navigation pane.
2. Highlight the *Product Barcode Import Errors Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The data formats defined for the organization's locale are used on the report.
   - Date range: Select either:
     – Rolling Dates: One of the date ranges available from this field to include errors that occurred during the range of dates. See *Rolling Dates* at the *Run Reports* screen for more information; or,
     – From and To dates: Enter or select the first and last dates to include. The report includes errors that occurred during this range of dates. The From and To dates can be the same, and can be the current date.

> **Note:**
>
> If the error occurred earlier than the Days to Keep Errors specified for the *Product Import* at the *Schedule Jobs* screen, it is not retained in the table or eligible to print on the report.

- Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
- Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

- Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

4. Click *Run Report*.

For more information: See *Viewing generated reports* at the *Run Reports* screen.

Language and formats: The language, date, time, and number formats on the report are from the data formats defined for the organization’s locale.

Contents:

- Organization Name and report title
- Report Criteria heading:
  – Locations: *All*.
  – Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window.
- *Import ID*. Each import ID starts on a new page.
- *System* code
- For each error with the same *Import ID*:
  – Product code: The product code identifying the product in the *default system*.
  – System product code: The *system product* code identifying the product in the external system specified in the import file name. The system product code might differ from the *product* code if the external system is not the *default system* for the organization.
  – Error: See *Understanding product UPC barcode import errors*.

The footer on each page of the report lists:

- the date and time when the report was generated
- the current page number and total number of pages (for example, *Page 1 of 6*)

The data formats defined for the organization's locale control the formatting of the report.

Understanding product UPC barcode import errors

Error Code	Error Message	Possible Reasons
10	`System Record Not Found`	The *System* code specified is invalid.
15	`System Product/ Product Code mismatch`	The system product code does not exist for the *System* code specified in the import file. This product barcode import error can be the result of a product import error; for example, it can occur if: • you created a new product in your integrated systems, and did not run the import process for the default system before the other systems in the organization • the import process included product barcodes but not the corresponding products or system products • there was other invalid data in the product import that prevented the import process from creating the product or system product
58	`Invalid Barcode Type`	A barcode type of UPC-A or EAN-13 was not specified.

Product Import Errors Report

Purpose: Use the **Product Import Errors Report** to review errors related to products or system products that occurred during the import into Order Broker using the process described under *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database*, or through *OCDS or Merchandising Omni Services Imports*. You can schedule imports or run them on demand through the *Schedule Jobs* screen.

Successfully imported products and system products not listed: Only product import records that resulted in error are listed on the report. For example, if the import process included 500 products or system products, and 495 products or system products were created or updated without error, the report lists the 5 errors.

Correcting import errors: The best way to correct import errors is to correct the product record in the integrated system. The next time you process imports for the system, the product will be created or updated correctly. Otherwise, if you attempt to create or update the product using the Order Broker screens, the record cannot be updated correctly with each future scheduled import. You can use the *Schedule Jobs* to schedule the next import process, or to run it on demand.

Database table: The errors listed on this report are from the product_import table.

> **Note:**
>
> Some errors that can occur from the data in the flat import file are not written to the related import database table, so in that case the error is noted only in the error file and not on the related report, for example: an invalid number of columns in the flat file, a numeric field that contains alphabetical data, or a date that is not formatted correctly.

For more information: See the *Importing Products, System Products, and Item Image URLs through File Storage API* or *OCDS or Merchandising Omni Services Imports*.

Used for the Routing Engine module.

How to generate this report: Available if Use Routing Engine is selected at the *Tenant* screen. At the *Run Reports* screen:

1. Click the plus sign next to the *Operations* folder in the left-hand navigation pane.
2. Highlight the *Product Import Errors Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The data formats defined for the organization's locale are used on the report.
   - Date range: Select either:
     – Rolling Dates: One of the date ranges available from this field to include orders that became fully unfulfillable or partially unfulfillable during this range of dates. See *Rolling Dates* at the *Reports* screen for more information; or,
     – From and To dates: Enter or select the first and last dates to include. The report includes orders that became fully unfulfillable or partially unfulfillable during this range of dates. The From and To dates can be the same, and can be the current date.

     > **Note:**
     >
     > Product import activity is retained only for the *Days to Keep Errors*specified at the *Schedule Jobs* screen. For example, if the Days to Keep Errors is set to 7, you cannot generate the report for any dates earlier than the last 7 days.

   - Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
   - Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

     > **Note:**
     >
     > You must select either Export to PDF or Export to Excel, or both.

   - Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

     > **Note:**
     >
     > If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports* at the *Reports* screen.

Language and formats: The language, date, time, and number formats on the report are from the data formats defined for the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the department description exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading:
  - Locations: *All*.
  - Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window.
- *Import ID*. Each import ID starts on a new page.
- *System* code
- For each error with the same *Import ID*:
  - *Product* code: Identifies the item in the *default system*.
  - System product code: The *system product* code identifying the product in the external system. The system product code might differ from the *product* code if the external system is not the *default system* for the organization.
  - *Master Style*: Optional field. Order Broker updates this field for the product only if it passed from the *default system*.

    > **Note:**
    >
    > Normally, you would never change the master style for a product in Order Broker.

  - product *Name*: Order Broker updates this field for the product only if it is passed from the *default system*. Product names can be 1 to 40 positions in length.

- *Department*: The description of the product's department. Order Broker updates this field for the product only if it is passed from the *default system*. The department description can be 1 to 40 positions in length, and is informational only. Optional field.

  > **Note:**
  >
  > If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Department. Long SKU departments are used to identify items within a retail hierarchy.

- *Class*: The description of the product's class. Order Broker updates this field for the product only if it is passed from the *default system*. The class description can be 1 to 40 positions in length, and is informational only. Optional field.

  > **Note:**
  >
  > If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Class. Taken from the base item rather than the SKU if this is a SKU'd item. Long SKU classes can be used together with long SKU departments to identify items within a retail hierarchy.

- *Category*: The description of the product's category. Order Broker updates this field for the product only if it is passed from the *default system*. The category description can be 1 to 40 positions in length, and is informational only. Optional field.

  > **Note:**
  >
  > If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Division. Long SKU divisions can be used together with long SKU departments and classes to identify items within a retail hierarchy.

- Error: See *Understanding product import errors*.

The footer on each page of the report lists:

- the date and time when the report was generated
- the current page number and total number of pages (for example, *Page 1 of 6*)

The data formats defined for the organization's locale control the formatting of the report.

Understanding product import errors

Error Code	Error Message	Possible Reasons
10	`System Record Not Found`	The *System* code provided is not a valid *system* in Order Broker. This error does not occur for *OCDS or Merchandising Omni Services Imports*, because the import is always scheduled or run on demand for a specific system.

Error Code	Error Message	Possible Reasons
11	`Product description required`	The product *Name* provided was a blank space and did not include any additional information. The product description is required regardless of whether the external system is the *default system*; however, the information is used only to create or update the *product* record itself.
12	`Duplicate System Product Code`	There was more than one entry for the same system product. In this case, the product is not created or updated. This error does not occur for *OCDS or Merchandising Omni Services Imports*.
13	`Empty Product Code`	No *product_cd* was specified. This error does not occur for *OCDS or Merchandising Omni Services Imports*, because the product code is always passed.
14	`Empty System Product Code`	No *system_product_cd* was specified for the product. This error does not occur for *OCDS or Merchandising Omni Services Imports*, because the same code is used for the product code and the system product code.
15	`System Product / Product Code mismatch`	The *system product* code and *product_cd* code provided were not the same, and the external system is the *default system*. This error does not occur for *OCDS or Merchandising Omni Services Imports*, because the same code is used for the product code and the system product code. If **Order Management System** is the default system, the OROB Product Code ID (K66) system control value should be set to *IT*.
20	`Primary system product not defined`	The external system is not the *default system*, and there is no existing *product* matching the *Product* code provided. When this error occurs and there are also any product locations included in the import, each of the product location import records will be in error with an error reason of `Product not defined for system`. **Large number of primary system product errors?** One reason why you might see a large number of records with this error is if the product import for this system ran before the product import for the *default system* for the organization. By scheduling the import for the default system before the other systems, you reduce the possibility that Order Broker will not be able to create the system product because the product does not exist.

Error Code	Error Message	Possible Reasons
76	`Invalid URL Format`	The URL passed for an item image was not formatted correctly. The URL should be formatted as `https://www.example.com/folder/image.png`, where: • `http` or `https` is the protocol • `www.example.com` is the domain or server name • `folder` is a folder or subfolder where the image is found • `image.png` or `image.jpg` is the name of the image The import does not validate that an image is found at the specified URL.
77	`Invalid URL length`	The URL passed for an item image exceeded 255 positions.

Unfulfillable Report

Purpose: Use the **Unfulfillable Report** to generate a list of Order Broker orders that became fully or partially unfulfillable for all placing (originating) locations, or for a specific location. The information on the report includes the customer's name, email address, and phone numbers, as well as the type of order and whether the order is fully or partially unfulfillable.

Used for the Routing Engine module.

Order types on the report: This report lists delivery, ship-for-pickup, or pickup orders that became unfulfillable.

How to generate this report: At the *Run Reports* screen:

1. Click the plus sign next to the *Operations* folder in the left-hand navigation pane.
2. Highlight the *Unfulfillable Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The data formats defined for the organization's locale are used on the report.
   - Placed Location: Optionally, select a single *location* to select only orders that originated in that location on the report. Only locations associated with the selected *organization* are available for selection. Otherwise, leave this field blank to include unfulfillable orders originating in all locations in the organization.
   - Date range: Select either:
     – Rolling Dates: One of the date ranges available from this field to include orders that became fully or partially unfulfillable during this range of dates. See *Rolling Dates* for more information; or,

    - From and To dates: Enter or select the first and last dates to include. The report includes orders that became fully or partially unfulfillable during this range of dates. The From and To dates can be the same, and can be the current date.
  - Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
  - Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

  - Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are from the data formats defined for the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the customer's email address exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading:
  - Locations: If a specific originating location was selected to include on the report, this location code and name is listed; otherwise, the heading lists *All*.
  - Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window.
- The location code and name for each placing (originating) location included on the report. For each order that became fully or partially unfulfillable during the date range for this placing location:
  - *Request ID* assigned by Order Broker.
  - *Order Number* assigned by the originating system.

  - Date Created: The date when the order was created in Order Broker. Might not be the same as the *Order Date*.
  - Customer Name: The sold-to customer's first and last name, if both were passed in the *submit order message*; otherwise, this is the company name. Asterisks print if the customer has been *anonymized*.
  - Email address: The email address passed for the sold-to customer in the *submit order message*. Asterisks print if the customer has been *anonymized*.

> **Note:**
>
> The email address is truncated if it might exceed the estimated space for the column based on the number of characters. If the email address is truncated, the characters to the right of a punctuation mark, such as a period, are omitted. For example, if the customer's email address is `james.k.polk@example.com`, it is truncated to `james.k.polk@example` on the report.

- Day phone: The first phone number passed for the sold-to customer in the *submit order message* (`phone1`). Up to 12 positions.
- Evening: The second phone number passed for the sold-to customer in the *submit order message* (`phone2`). Up to 12 positions.

> **Note:**
>
> Order Broker does not apply any formatting to the phone numbers passed in the submit order message.

- Unfulfillable type:
  - *Entire:* the entire order is currently unfulfillable, and became partially or completely unfulfillable during the selected date range. For example, one line on an order become unfulfillable last week, and the remaining line on the order became unfulfillable this week. The order is listed on the report with an unfulfillable type of Entire, regardless of whether you generate the report with a date range that includes last week or this week.
  - *Partial:* some units or lines on the order became unfulfillable within the selected date range, and the order is still only partially unfulfillable. It is possible that the remaining lines or units on the order have since been fulfilled or are still open.

> **Note:**
>
> A partial unfulfillable status is possible only if your organization is *splitting orders*.

- Order Type: Possible order types on the report are:
  - *Delivery:* See *delivery order*.
  - *Pickup:* See *pickup order*.
  - *Ship For Pickup:* See *ship-for-pickup order*

The footer on each page of the report lists:

- the date and time when the report was generated
- the current page number and total number of pages (for example, *Page 1 of 6*)

The data formats defined for the organization's locale control the formatting of the report.

Zone List Report

Purpose: Use the **Zone List Report** to identify which locations are assigned to fulfillment zones as either primary or alternate fulfilling or sourcing locations, and which locations are not assigned to any zones.

Used for the Routing Engine module.

Primary and alternate locations: When you use *zone fulfillment*, the Routing Engine attempts to assign delivery or ship-for-pickup orders shipping within the zone area to the locations you designate as primary for the zone. If the Routing Engine cannot assign an order within the list of primary locations, it attempts to assign the order to one of the alternate locations.

For more information: See *Using Zones for Fulfillment* for an overview and complete description of zone fulfillment logic, and see *Fulfillment Zone Wizard* for information on setting up zones.

How to generate this report: At the *Run Reports* screen:

1. Click the plus sign next to the *Operations* folder in the left-hand navigation pane.
2. Highlight the *Zone List Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The data formats defined for the organization's locale are used on the report.
   - Location: Optionally, select a single *location* to include only that location on the report. With this setting, the report includes zones only if that location is specified as a primary or alternate fulfilling or sourcing location. Only locations associated with the selected *organization* are available for selection. Otherwise, leave this field blank to include all locations in the organization.

     > **Note:**
     >
     > The *Default Unfulfillable Location* is not eligible to be included on this report.

   - Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
   - Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

- Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are from the data formats defined for the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the location code and name exceed the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading: If a specific originating location was selected to include on the report, this location code and name is listed; otherwise, the heading lists *All*.
- Specific location? If the report is for a specific location, for each zone in the organization where the location is assigned the report lists:
  - Zone name
  - Active? This flag is set to *Y* if the zone is currently active; otherwise, the flag is set to *N*
  - Search Location Type for the zone: either *Primary* or *Alternate*
  - If the location is not assigned to any zones, it is listed under Unassigned Locations
- All locations? If the report is for all locations, for each zone in the organization:
  - Zone name
  - Active? This flag is set to *Y* if the zone is currently active; otherwise, the flag is set to *N*
  - Location code and name, separated by a hyphen (for example, 1 - Main Distribution Center)
  - Search Location Type for the zone, either *Primary* or *Alternate*
  - Locations that are not assigned to any zones are listed under Unassigned Locations

> **Note:**
>
> The *Default Unfulfillable Location* is not included on this report.

The footer on each page of the report lists:

- the date and time when the report was generated
- the current page number and total number of pages (for example, *Page 1 of 6*)

The data formats defined for the organization's locale control the formatting of the report.

PO Item Status Report

Purpose: Use the **PO Item Status Report** to generate a list of purchase order lines created within a certain date range, indicating their current status.

Used for the Supplier Direct Fulfillment module.

Selection options: Optionally, you can restrict the orders on the report by:

- *vendor*
- *brand*
- current *line status*

How to generate this report: Available if Use Vendor Portal is selected at the *Tenant* screen. At the *Run Reports* screen:

1. Click the plus sign next to the *Drop Ship* folder in the left-hand navigation pane.
2. Highlight the *PO Item Status Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The data formats defined for the organization's locale are used on the report.
   - Vendor: Optionally, select a single *vendor* to have the report include only purchase order lines for that vendor. Otherwise, leave this field blank to include all eligible purchase order lines regardless of vendor.
   - Brand: Optionally, select a single *brand* to have the report include lines only on purchase orders for that brand. Otherwise, leave this field blank to include all eligible purchase order lines regardless of brand.
   - Line Status: Optionally, select a single *line status* to have the report include lines only if they are currently in that status. Otherwise, leave this field blank to include all eligible purchase order lines regardless of status.
   - Date range: Select either:
     – Rolling Dates: Select one of the date ranges available from this field to include purchase orders with created dates (based on the `po_entered_date` from the *CreateDSOrder* message) during this range

of dates. See *Rolling Dates* at the *Run Reports* screen for more information on rolling date options); or,

  – From and To dates: Enter or select the first and last dates to include. The report includes purchase orders with created dates (based on the `po_entered_date` from the *CreateDSOrder* message) during this range of dates. The From and To dates can be the same, and can be the current date.

- Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
- Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

- Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports* at the *Run Reports*.

Language and formats: The language, date, time, and number formats on the report are from the data formats defined for the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the item description exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading: Each of the selection options entered at the *Run Reports* screen or the *Schedule Report* window is indicated here. The report lists *All* for each option that you did not select as a restriction.
  – Vendor
  – Brand
  – Line Status
  – Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window
- Report results: The results are sorted alphabetically by vendor name, alphabetically by brand name, alphanumerically by item code, and then in chronological order, and include:

  - The vendor name for each vendor that has purchase order lines included on the report. Asterisks print if the vendor has been *anonymized*.
  - The brand name for each brand that has purchase order lines included on the report.

  There is a page break and subtotal for each vendor/brand combination.

- For each purchase order line included on the report:
  - Item No: Your item number or code.
  - Vendor Item No: The vendor’s item number or code. Vendor item records are created in Order Broker when Order Broker receives a purchase order from the originating system. When the purchase order originates in Order Management System, this is the vendor item number (*WVNI*).
  - Item Description: Your description of the item.
  - PO No: The purchase order number assigned by the originating system.
  - Sales Order No: The number or code identifying the order in the originating system.
  - Line Status: The current *line status*.
  - Created Date: The date when the purchase order was created (based on the `po_entered_date` from the *CreateDSOrder* message).
  - Due Date: The current due date for the item.
  - Batch ID: The ID number to identify the batch of pack slips. Included only if the vendor has generated pack slips.
- Totals: The total number of separate purchase order lines and purchase orders for the vendor and brand.
- Grand Totals: The total number of separate purchase order lines and purchase orders for the vendor, across all brands.

The footer on each page of the report lists:

- the date and time when the report was generated, in MM/DD/YYYY HH:MM AM format
- the current page number and total number of pages (for example, *Page 1 of 6*)

The organization’s locale controls the formatting of the report.

Vendor Aging Detail Report

Purpose: Use the **Vendor Aging Detail Report** to review a list of purchase order lines that are not yet either shipped or canceled. The report lists lines that are currently in Held, In Process, or New Order status within a specified range of current due dates.

Used for the Supplier Direct Fulfillment module.

Selection options: Optionally, you can restrict the purchase order lines listed on the report by:

- *vendor*
- *brand*
- current *line status*

How to generate this report: Available if Use Vendor Portal is selected at the *Tenant* screen. At the *Run Reports* screen:

1. Click the plus sign next to the *Drop Ship* folder in the left-hand navigation pane.
2. Highlight the *Vendor Aging Detail Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The organization's locale controls the data formats used on the report.
   - Vendor: Optionally, select a single *vendor* to have the report include only lines on purchase orders that are assigned to that vendor. Otherwise, leave this field blank to include all eligible purchase order lines regardless of vendor.
   - Brand: Optionally, select a single *brand* to have the report include only purchase order lines associated with that brand. Otherwise, leave this field blank to include all eligible purchase order lines regardless of brand.
   - Line Status: Optionally, select a *line status* of Held, In Process, or New Order to have the report include only purchase order lines that are currently in the selected status. Otherwise, leave this field blank to include all eligible purchase order lines regardless of status.
   - Date range: Select either:
     – Rolling Dates: Select one of the date ranges available from this field to include purchase order lines that have current due dates during this range of dates. See *Rolling Dates* for more information on rolling date options); or,
     – From and To dates: Enter or select the first and last current due dates to include purchase order lines whose current due dates are during this range of dates. The From and To dates can be the same, and can be the current date.

     Revised due date? If the vendor has revised the due date for a purchase order line, the report uses the revised due date to determine whether to include the line on the report. Lines whose revised due dates are within the date range are included, even if their original due dates are not within the range of dates.
   - Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
   - Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

     > **Note:**
     >
     > You must select either Export to PDF or Export to Excel, or both.

   - Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are based on the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the item description exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading: Each of the selection options entered at the *Run Reports* screen or the *Schedule Report* window is indicated here. The report lists *All* for each option that you did not select as a restriction.
  - Vendor
  - Brand
  - Line Status
  - Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window
  -
- Report results: The results are sorted alphabetically by vendor name, alphabetically by brand name, alphanumerically by item code, and then in chronological order, and include:
  - The vendor name for the vendor that has purchase order lines included on the report. Asterisks print if the vendor has been *anonymized*.
  - The brand name for the brand that has purchase order lines included on the report.

    There is a page break and subtotal for each vendor/brand combination.
- For each purchase order line included on the report:
  - Item No: Your item number or code, including the SKU code, if any.
  - Vendor Item No: The vendor's item number or code. Vendor item records are created in Order Broker when Order Broker receives a purchase order from the originating system. When the purchase order originates in Order Management System, this is the vendor item number (*WVNI*).
  - Item Description: Your description of the item.
  - Units: The total number of open units for the item, brand, and vendor.

  - Value: Your extended purchase order unit price for the item, brand, and vendor. Truncated if it exceeds the allotted space of up to 13 positions, including separating characters such as periods and commas.
  - Line Status: The current *line status*.
  - Due Date: The current due date for the item.
  - Future Due Days: The number of days remaining until the due date. Included only if the current due date is in the future. Calculated by subtracting the current date with the current due date for the item. For example, if today's date is 8/24 and the current due date is 8/25, the Future Due Days is 1.
  - Past Due Days: The number of days that the purchase order line is past due. Included only if the current due date is the same as the current date, or is in the past. Calculated by subtracting the current due date for the item from the current date. For example, if today's date is 8/24 and the current due date is 8/22 the Past Due Days is 2.
- Totals: The total number of units and extended value for the vendor and brand. Extended value is truncated if it exceeds the allotted space of up to 13 positions, including separating characters such as periods and commas.
- Grand Totals: The total number of units and extended value for the vendor, across all brands. Extended value is truncated if it exceeds the allotted space of up to 13 positions, including separating characters such as periods and commas.

The footer on each page of the report lists:

- the date and time when the report was generated, in MM/DD/YYYY HH:MM AM format
- the current page number and total number of pages (for example, *Page 1 of 6*)

The locale defined for the organization controls the formatting of the report.

Vendor Aging Summary Report

Purpose: Use the **Vendor Aging Detail Report** to review a summary of the total units and values of items on purchase order lines that are not yet either shipped or canceled. Lines whose statuses are currently in Held, In Process, or New Order status are included in the totals for each item, vendor, and brand for the specified range of dates.

Used for the Supplier Direct Fulfillment module.

Selection options: Optionally, you can restrict the purchase order lines included in the totals on the report by:

- *vendor*
- *brand*
- current *line status*

How to generate this report: Available if Use Vendor Portal is selected at the *Tenant* screen. At the *Run Reports* screen:

1. Click the plus sign next to the *Drop Ship* folder in the left-hand navigation pane.
2. Highlight the *Vendor Aging Summary Report*. The center of the screen displays the related *Report Options*.
3. Select:

- Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The organization's locale controls the data formats used on the report.
- Vendor: Optionally, select a single *vendor* to have the report totals include only lines on purchase orders that are assigned to that vendor. Otherwise, leave this field blank to have the totals include all eligible purchase order lines regardless of vendor.
- Brand: Optionally, select a single *brand* to have the report totals include only purchase order lines associated with that brand. Otherwise, leave this field blank to include all eligible purchase order lines regardless of brand.
- Line Status: Optionally, select a *line status* of Held, In Process, or New Order to have the report totals include only purchase order lines that are currently in the selected status. Otherwise, leave this field blank to have the totals include all eligible purchase order lines regardless of status.
- Date range: Select either:
  - Rolling Dates: Select one of the date ranges available from this field to have the totals include purchase order lines that have current due dates during this range of dates. See *Rolling Dates* for more information on rolling date options); or,
  - From and To dates: Enter or select the first and last current due dates to have the totals on the report include purchase order lines whose current due dates are during this range of dates. The From and To dates can be the same, and can be the current date.

  Revised due date? If the vendor has revised the due date for a purchase order line, the report uses the revised due date to determine whether to include the line on the totals on the report. Lines whose revised due dates are within the date range are included in the totals, even if their original due dates are not within the range of dates.

  - Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
  - Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

    > **Note:**
    >
    > You must select either Export to PDF or Export to Excel, or both.

- Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

  > **Note:**
  >
  > If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are based on the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the item description exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading: Each of the selection options entered at the *Run Reports* screen or the *Schedule Report* window is indicated here. The report lists *All* for each option that you did not select as a restriction.
  - Vendor
  - Brand
  - Line Status
  - Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window
- Report results: The results are sorted alphabetically by vendor name, alphabetically by brand name, alphanumerically by item code, and then in chronological order, and include:
  - The vendor name for the vendor that has purchase order lines included in the totals on the report. Asterisks print if the vendor has been *anonymized*.
  - The brand name for the brand that has purchase order lines included in the totals on the report.

    There is a page break and subtotal for each vendor.
- For each item included on the report for a brand and vendor:
  - Item No: Your item number or code, including the SKU code, if any.
  - Vendor Item No: The vendor's item number or code. Vendor item records are created in Order Broker when Order Broker receives a purchase order from the originating system. When the purchase order originates in Order Management System, this is the vendor item number (*WVNI*).
  - Item Description: Your description of the item.
  - Units: The total number of units on the purchase order line.
  - Value: Your extended purchase order unit price to the vendor.
- Total: The total number of units and extended value for the vendor and brand.
- Grand Total: The total number of units and extended value for the vendor, across all brands.

The footer on each page of the report lists:

- the date and time when the report was generated, in MM/DD/YYYY HH:MM AM format
- the current page number and total number of pages (for example, *Page 1 of 6*)

The locale defined for the organization controls the formatting of the report.

Invoice Detail Report

Purpose: Use the **Invoice Detail Report** to review a list of invoices and the lines they include. The report lists invoices by status within a specified range of dates.

Used for the Supplier Direct Fulfillment module.

For more information: For background on the information on this report, see the *Invoice* screen.

Selection options: Optionally, you can restrict the invoices listed on the report by:

- *vendor*
- current *invoice status*

How to generate this report: Available if Use Vendor Portal is selected at the *Tenant* screen. At the *Run Reports* screen:

1. Click the plus sign next to the *Drop Ship* folder in the left-hand navigation pane.
2. Highlight the *Invoice Detail Report*. The center of the screen displays the related *Report Options*.
3. Select:
   - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The organization's locale controls the data formats used on the report.
   - Vendor: Optionally, select a single *vendor* to have the report include only lines on purchase orders that are assigned to that vendor. Otherwise, leave this field blank to include all eligible invoices regardless of vendor.
   - Invoice Status: Optionally, select an *invoice status* to have the report include only invoices that are currently in the selected status. Otherwise, leave this field blank to include all eligible invoices regardless of status.
   - Date range: Select either:
     – Rolling Dates: Select one of the date ranges available from this field to include invoices whose invoice dates, as specified by the vendor, are during this range of dates. See *Rolling Dates* for more information on rolling date options); or,
     – From and To dates: Enter or select the first and last invoice dates to include invoices whose invoice dates, as specified by the vendor, are during this range of dates. The From and To dates can be the same, and can be the current date.
4. Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
5. Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

6. Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

7. Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are based on the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the description of the invoice exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- Report Criteria heading: Each of the selection options entered at the *Run Reports* screen or the *Schedule Report* window is indicated here. The report lists *All* for each option that you did not select as a restriction.
  - Vendor
  - Invoice Status
  - Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window
- Report results: The results are sorted alphabetically by vendor name and status, and alphanumerically by invoice number, and include:
  - The name of the *vendor* that has invoices included on the report.
  - The *invoice status*

  There is a page break and subtotal for each vendor/status combination.
- For each invoice included on the report:
  - Invoice No: The invoice number specified by the vendor.
  - Invoice Date: The date specified by the vendor when creating the invoice. The current date defaults when the vendor creates an invoice at a Vendor Portal screen, but the vendor can override it.
  - Description: This column can display:

    * Description: The description of the invoice, if any, entered by the vendor. This description is on the top line for the invoice, on the same line as the invoice totals (including total Merch Amount, Freight Amount, Handling Amount, Other Amount, and Total Amount for the invoice) and Gross Due Date. Each of these additional fields is described below. If the vendor did not enter a description, this field is blank, and the invoice totals are to the right.
    * Header Level Charges: This text indicates that the line displays the header-level charges, if any, for the invoice. The vendor can specify header-level charges, detail-level charges, or both. Possible charges are Freight Amount, Handling Amount, and Other Amount. The total of these three header-level charge amounts is displayed as the Total Amount on the Header Level Charges line. Amounts of *0.00* are listed if the vendor did not enter any of the header-level charges.
    * Purchase Order and Line #: The purchase order number and purchase order line number that have a shipment included in the invoice. Each shipment on the invoice is listed separately, even if shipments are for the same purchase order and line number.
- Merch Amount:
    * For the invoice header (same line as the invoice Description, if any): the total extended cost of all invoice detail lines, calculated using the current invoice unit costs.
    * For Header Level Charges: blank.
    * For invoice detail lines: the total extended cost of the line, calculated using the current invoice unit cost and the invoice quantity. The invoice quantity is based on the shipment quantity and may not include the entire purchase order line quantity.
- Freight Amount:
    * For the invoice header (same line as the invoice Description, if any): the total of header-level and detail freight charges, if any.
    * For Header Level Charges: the header-level freight charge, if any.
    * or invoice detail lines: the detail-level freight charge, if any.
- Handling Amount:
    * For the invoice header (same line as the invoice Description, if any): the total of header-level and detail handling charges, if any.
    * For Header Level Charges: the header-level handling charge, if any.
    * For invoice detail lines: the detail-level handling charge, if any.
- Other Amount:
    * For the invoice header (same line as the invoice Description, if any): the total of header-level and detail “other” charges, if any.
    * For Header Level Charges: the header-level “other” charge, if any.
    * For invoice detail lines: the detail-level “other” charge, if any.
- Total Amount:
    * For the invoice header (same line as the invoice Description, if any): the total of merchandise and all charges.

      * For Header Level Charges: the total header-level charges, if any.
      * For invoice detail lines: the total detail-level merchandise and charges.
    – Gross Due Date: The Invoice Date plus the Gross Days specified for the invoice.
- Totals: The total merchandise, freight, handling, other, and total amount for the vendor and invoice status.
- Grand Totals: The total merchandise, freight, handling, other, and total amount for all vendors and invoice statuses included in the report.

The footer on each page of the report lists:

- the date and time when the report was generated, in MM/DD/YYYY HH:MM AM format
- the current page number and total number of pages (for example, *Page 1 of 6*)

The locale defined for the organization controls the formatting of the report.

Status Restricted Report

Purpose: Use the **Status Restricted Report** to generate a list of order lines with transaction history records indicating that an Order Status Update request indicated to change the status, but the update was prevented because the order line was in fulfilled status, or because the order was in canceled status, and the Restrict Reassignment of Canceled Line preference was selected.

Used for the Routing Engine module.

How to generate this report: At the *Run Reports* screen:

1. Click the plus sign next to the *Operations* folder in the left-hand navigation pane.
2. Highlight the *Status Restricted Report*. The center of the screen displays the related *Report Options*.
3. Select:
    - Organization: The *organization* to include on the report. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. The organization's locale controls the data formats used on the report.
    - Order Type: Optionally, select a single order type to include on the report. Available order types are Delivery, Pickup and Ship-for-Pickup. If no order type is selected, all orders can be included on the report, regardless of type.
    - Order Status:

      Optionally, select a status of either Canceled or Fulfilled. An order line is included if it was in the selected status regardless of whether the entire order was in that status.
    - Date range: Select either:
        – Rolling Dates: One of the date ranges available from this field to include order lines that had a requested status update restricted during this range of dates. See *Rolling Dates* for more information; or,
        – From and To dates: Enter or select the first and last dates to include. The report includes orders that became fully or partially unfulfillable during this range of dates. The From and To dates can be the same, and can be the current date.

- Export to PDF: Select this option to generate a PDF version of the report that you can review in a PDF viewer.
- Export to Excel: Select this option to generate the report in .XLSX format, which you can open in a spreadsheet application.

> **Note:**
>
> You must select either Export to PDF or Export to Excel, or both.

- Email List: Optionally, enter one or more valid email addresses, separated by semicolons (;), to receive the report.

> **Note:**
>
> If you select both Export to PDF and Export to Excel, each email recipient receives two separate emails, each with a version of the report attached.

4. Click *Run Report*.

For more information: See *Viewing generated reports*.

Language and formats: The language, date, time, and number formats on the report are based on the organization's locale.

Truncated data? If the data in any column exceeds the allotted width, it is truncated. For example, if the customer's email address exceeds the allotted width of that column, any additional characters beyond that width are omitted. The specific number of characters that fit in each column varies because different characters have different widths: for example, a W is wider than an I.

Contents:

- Organization Name and report title
- *Report Criteria* heading:
  - *Order Type*: If a specific order type was selected, this order type is listed; otherwise, the heading lists *All*.
  - *Order Status*: If an order status of Canceled or Fulfilled was selected, this status listed; otherwise, the heading lists *All*.
  - Date Range: The range of dates entered at the *Run Reports* screen, or calculated based on the *Rolling Dates* selection at the *Run Reports* screen or the *Schedule Report* window.
- Orders are grouped by status. A status of Canceled or Fulfilled is listed above the group of orders. These are the only two statuses included on the report. For lines that are in the indicated status, and had a restricted status update:
  - *Request ID* assigned by Order Broker.
  - *Order Number* assigned by the originating system.
  - Line #:

    The order line number assigned by Order Broker.

- Item:

  The code identifying the product in the default system for the organization.
- Description:

  The description of the product.
- Transaction Date:

  The date for the order transaction history record created when the status update was restricted.
- Restricted Status:

  The status that was restricted from being applied to the order line.
- Location:

  The code and description of the location that submitted the status update request. Truncated if the code and description exceed the available space.
- Order Type:

  Possible order types on the report are:

  * *Delivery:* See *delivery order*.
  * *Pickup:* See *pickup order*.
  * *Ship For Pickup:* See *ship-for-pickup order*

Count: The total number of order lines listed on the report for each status.

The footer on each page of the report lists:

- the date and time when the report was generated
- the current page number and total number of pages (for example, *Page 1 of 6*)

The locale defined for the organization controls the formatting of the report.

Note:

If an order had multiple restricted status updates on the same date, it is included only once on the report for that date.

12 Systems Menu

> **Note:**
>
> Screens indicated with an asterisk (*) are available from the *Systems* dropdown menu but not from the *Systems* area of the home screen.

- **View Active Schedules*
  - *Auto Cancel Unclaimed Pickup Orders History*
  - *Browse Active Schedules*
  - *Completed Order Private Data Purge History*
  - *Daily Clean Up Job History*
  - *Email Notifications Job History*
  - *Fulfilled Inventory Export History*
  - *Identity Cloud User Synchronization History*
  - *Incremental Imports History*
  - *Inventory Quantity Export History*
  - *Sales Order Data Extract Job History*
  - *Product Imports History*
- **View Job History*
- **Schedule Jobs*
- *Event Logging*
- **Roles*
  - *Browse Role*
  - *Role Wizard*
- *User Profiles*
  - *User Profile Configuration*
  - *Browse User Profile*
- *Vendor User Profiles*: Used for the Supplier Direct Fulfillment module. Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Vendor User Profile*: Available if Use Vendor Portal is selected at the *Tenant* screen.
  - *Browse Vendor User Profile*: Available if Use Vendor Portal is selected at the *Tenant* screen.
- *Store Associate User Profiles*: Used for the Store Connect module. Available if Use Store Connect is selected at the *Tenant* screen.

- *Edit Store Associate User Profile*: Available if Use Store Connect is selected at the *Tenant* screen.
- *Browse Store Associate User Profile*: Available if Use Store Connect is selected at the *Tenant* screen.

- *Proximity Uploads*: Available if Use Routing Engine is selected at the *Tenant* screen.
- *Systems*
  - *System*
- **Tenant*: advance to either the *Tenant (retailer information)* screen or the *Tenant-Admin* screen, depending on whether you are an *admin user*
- **Web Service Authorization*
  - **Web Service User*
  - **New Web Service User*
- *Manage External Application Access*
  - *Edit Web Services*
  - *Generate Application Client*
  - *Regenerate Application Client Secret*
- **File Storage History*
- **About Order Broker*

View Active Schedules

Purpose: Use the **View Active Schedules** screen to:

- Review jobs that are currently scheduled to run, or that have existing history. Only jobs whose *Schedule Enabled* flag is selected at the *Schedule Jobs* screen, or that have existing job history that has not been purged, are displayed here.
- Start or reschedule all scheduled jobs and other scheduled programs such as imports, exports, and report generation. You might use the *Reschedule All* option to resolve an issue with scheduled jobs and programs. You also use this option at initial Order Broker configuration to start all jobs and tasks, or after applying an upgrade.

History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

History icon always shown: The history icon to review job history is available for all jobs listed on this screen, regardless of whether the Schedule Enabled flag at the Schedule Jobs screen is selected for the job. However, history is available for review only if the job has run at least once, and it has any history records that have not been purged.

How to display this screen: Select *View Active Schedules* from the *Systems Menu*. The landing page does not have a shortcut to this screen.

> **Note:**
>
> Only users with View Active Schedules authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
search for a scheduled job	Optionally, select a *Job Name*, *Organization*, and/or *System* and click *Search* to display the scheduled job. **Note:** Searching by organization or system is supported only for jobs that are specific to an organization or system. See the *Job Name* field a summary description of each job.
select a scheduled job for review	Highlight a scheduled job to open the *Browse Active Schedules* window. This window displays the schedule interval and the related time or minutes for the scheduled job.
refresh the displayed information	Click *Search*.
review history for a job	Click the history icon ( ) in the *History* column for a record to open the related history screen: • *Auto Cancel Unclaimed Pickup Orders History* • *Completed Order Private Data Purge* • *Daily Clean Up Job History* • *Email Notifications Job History* • *Fulfilled Inventory Export History* • *Generate Pickup Reminder Email History* • *Identity Cloud User Synchronization History* • *Incremental Imports History* • *Inventory Quantity Export History* • *Product Imports History* • *Sales Order Data Extract Job History* Although you can advance to the related history, screen, no history is displayed if the job has not yet run, or if existing history records were purged.

Option	Procedure
reschedule all	Select *Reschedule All* to stop and restart all scheduled jobs and programs. You might use this option: • When you first configure Order Broker and need to enable all jobs and programs to run as scheduled. • After an upgrade is applied to Order Broker. • To correct an issue with scheduled jobs and programs. Only users with Reschedule All authority have this option. **Which jobs and programs?** This option schedules, or stops and reschedules all of the jobs listed at this screen, plus: • Scheduled reports (*Schedule Reports*). • In Process cleanup job (see *Acknowledge Order Before Brokering* for background) **Note:** The Reschedule All option does not change the status of jobs that are in Paused status (⊘). Order Broker automatically restarts these jobs after a brief pause.

Fields at this screen

Field	Description
Search fields:	

Field	Description
Job Name	A job that is currently scheduled. Optionally, select a listed job and select *Search* to display the schedule information for that job. Jobs that can be scheduled and displayed here are: *Auto Cancel Unclaimed Pickup Orders:* Cancels unclaimed pickup or ship-for-pickup orders based on the settings of the *Auto Cancel Days of Unclaimed Pickup Orders* and *Auto Cancel Days of Unclaimed Ship For Pickup Orders* at the **Preferences** screen. This job runs daily at a specified time. See *Auto-Cancel Unclaimed Orders* for a discussion. *Completed Order Private Data Purge:* Anonymizes customer data on sales orders that closed (fulfilled, canceled, unfulfillable, completed) and purchase orders that have been closed (shipped, complete, or canceled) and that are older than a specified number of days. See *Completed Order Private Data Purge* for a discussion. *Daily Clean Up:* Clears outdated information on a daily basis. See the *Daily Clean Up* job for details. This job runs daily at a specified time. *Email Notifications:* Generates email notifications to store locations, vendors, customers, retailers, or systems operations staff based on the unprocessed records that are currently in the EMAIL_NOTIFICATION table. This job runs at the specified minute interval: for example, generate email notifications every 5 minutes. See the *Email Notifications* job for details. *Fulfilled Quantity Export:* Generates a pipe-delimited file of recent order fulfillments, so the inventory system of record can use this information to update its own inventory based on activity in Order Broker. See the *Fulfilled Inventory Export* job for details. *Generate Pickup Ready Reminder Emails:* Generates pickup-ready reminder emails to customers whose pickup orders have not been picked up within the number of *Aged Hours* defined for the job. See the *Generate Pickup Ready Reminder Emails* job for details. *Identity Cloud Service Synchronization:* Creates users in Order Broker based on the data that has been set up in IDCS or OCI IAM. See the *Identity Cloud User Synchronization* job for details. *Incremental Inventory Import:* Uses the contents of a pipe-delimited import file to update product location records for the system. See the *Incremental Inventory Import* job for details. *Inventory Quantity Export:* Creates a pipe-delimited export file providing the current totals for products or product locations based on updates to product location quantities, including applying probable quantity or probability rules. Also, supports a web service to respond to requests for current inventory quantity changes based on probability rules. See the *Inventory Quantity Export* job for details. *Product Import:* Imports and updates information that includes products, system products, product locations, locations, and product barcodes. See the *Product Import* job for details. *Sales Order Data Extract:* Creates export files containing data related to orders with any activity within a specified date range. See the *Sales Order Data Extract* for details. Jobs that are not flagged as enabled at the *Schedule Jobs* screen are not listed in the results here.

Field	Description
Organization	See *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. Filtering displayed jobs based on organization takes place only for the jobs that are associated with a specific organization: these are the Probable Quantity Export, Fulfilled Quantity Export, Product Import, Probable Quantity Export, and Incremental Inventory Import, and Sales Order Data Extract.
System	See *system*. Optionally, select a system the drop down list in order to display jobs run for the selected system. If you first select an Organization, only systems associated with that organization are displayed. Filtering jobs based on organization takes place only for the jobs that are associated with a specific system: these are the Probable Quantity Export, Fulfilled Quantity Export, Product Import, Probable Quantity Export, and Incremental Inventory Import.
Results fields:	
Job Name	See the *Job Name*, above, for information.
Organization	The *organization* code is displayed only for jobs related to a specific organization: these are the Probable Quantity Export, Fulfilled Quantity Export, Product Import, Probable Quantity Export, and Incremental Inventory Import, and Sales Order Data Extract.
System	The code identifying the *system* associated with the scheduled job. The system code is displayed only for those jobs related to a specific system: these are the Probable Quantity Export, Fulfilled Quantity Export, Product Import, Probable Quantity Export, and Incremental Inventory Import.
System Name	The name describing the system.
Last Updated	The last date and time when the schedule was updated for the job, and the ID of the user who performed the update.
Last Run	The last date and time when the job ran.
Next Run	The next date and time when the job is scheduled to run.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Status</td><td>Indicates the result of the most recent import process:

A green check ( ) indicates that no errors occurred.
<blockquote>Note:
The green check is also displayed if there were no records to import.</blockquote>
A red X ( ) indicates that an error occurred for at least one record in the import.
A yellow triangle ( ) indicates that the import was rejected because another instance of the same job, or of a conflicting job, was in process. See Schedule Imports for a listing of jobs that can conflict.
A running man ( ) indicates that the import is currently running.
A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running.

This field is blank if you have not yet run the import process for the system, or if the job is anything other than the Incremental Inventory Import, Product Import, Inventory Quantity Export, or Sales Order Data Extract.</td></tr>
<tr><td>Duration</td><td>The number of minutes and seconds it took the job to run, in MM:SS format. Displayed only for the Incremental Inventory Import, Product Import, and Sales Order Extract.</td></tr>
<tr><td>History</td><td>Click the history icon ( ) to advance to a screen displaying history for the job.
Note that history will exist only if:

The job has been run at least once,
The history has not been purged, based on the number of days specified in the Extract Log History setting at the Tenant-Admin screen.

Available history screens are:

Auto Cancel Unclaimed Pickup Orders History
Completed Order Private Data Purge
Daily Clean Up Job History
Email Notifications Job History
Fulfilled Inventory Export History
Generate Pickup Reminder Email History
Identity Cloud User Synchronization History
Incremental Imports History
Inventory Quantity Export History
Product Imports History
Sales Order Data Extract Job History
</td></tr>
</table>

Browse Active Schedules

Purpose: Use the **Browse Active Schedules** window to review how frequently or at what time an active job is scheduled to run.

How to display this window: Highlight a schedule at the *View Active Schedules* screen.

> **Note:**
>
> Only users with View Active Schedules authority can display this window. See the *Role Wizard* for more information.

Fields at this window

Field	Description
Job Name	The name of the active job. Available jobs are: *Auto Cancel Unclaimed Pickup Orders:* Cancels unclaimed pickup or ship-for-pickup orders based on the settings of the *Auto Cancel Days of Unclaimed Pickup Orders* and *Auto Cancel Days of Unclaimed Ship For Pickup Orders* at the **Preferences** screen. This job runs daily at a specified time. See *Auto-Cancel Unclaimed Orders* for a discussion. *Completed Order Private Data Purge:* Anonymizes customer data on sales orders that closed (fulfilled, canceled, unfulfillable, completed) and purchase orders that have been closed (shipped, complete, or canceled) and that are older than a specified number of days. See *Completed Order Private Data Purge* for a discussion. *Daily Clean Up:* Clears outdated information on a daily basis. See the *Daily Clean Up* job for details. This job runs daily at a specified time. *Email Notifications:* Generates email notifications to store locations, vendors, customers, retailers, or systems operations staff based on the unprocessed records that are currently in the EMAIL_NOTIFICATION table. This job runs at the specified minute interval: for example, generate email notifications every 5 minutes. See the *Email Notifications* job for details. *Fulfilled Quantity Export:* Generates a pipe-delimited file of recent order fulfillments, so the inventory system of record can use this information to update its own inventory based on activity in Order Broker. See the *Fulfilled Inventory Export* job for details. *Identity Cloud Service Synchronization:* Creates users in Order Broker based on the data that has been set up in IDCS or OCI IAM. See the *Identity Cloud User Synchronization* job for details. *Incremental Inventory Import:* Uses the contents of a pipe-delimited import file to update product location records for the system. See the *Incremental Inventory Import* job for details. *Probable Quantity Export:* Creates a pipe-delimited export file providing the current totals for products or product locations based on updates to product location quantities, including applying probable quantity rules. See the *Inventory Quantity Export* job for details. *Product Import:* Imports and updates information that includes products, system products, product locations, locations, and product barcodes. See the *Product Import* job for details. *Sales Order Data Extract:* Creates export files containing data related to orders with any activity within a specified date range. See the *Sales Order Data Extract* for details.
Organization	The *organization* related to the Displayed only for the *Sales Order Data Extract*.
Schedule Interval	The unit of time used for scheduling: Daily, Weekly, or Minutes. A Schedule Interval of Daily can indicate: • Run on a single day of the week only, at a specified time. • Run every day at a specified time. • Run on one or more days of the week, at a specified time.
Minutes	If the Schedule Interval is *Minutes*, this is the number of minutes the system waits between triggering the job to run. Otherwise, not displayed.
Day of Week	If the Schedule Interval is *Weekly*, this is the day of the week when the job is scheduled to run. Otherwise, not displayed.

Field	Description
Time	If the Schedule Interval is *Daily* or *Weekly*, this is the time of day when the job runs (24-hour clock).

Scroll up or down: Click the next arrow ( ) to display the next active schedule, if any. Similarly, click the previous arrow ( ) to display the previous active schedule, if any.

Auto Cancel Unclaimed Pickup Orders History

Purpose: Use the **Auto Cancel Unclaimed Pickup Orders History** screen to review the auto cancel unclaimed pickup orders jobs that have taken place or the one that is currently running, if any.

Used for the Routing Engine module.

For more information: See *Auto Cancel Unclaimed Pickup Orders* for an overview on the automatic cancellation process and background information.

How to display this screen: Click the history icon ( ) next to the Auto Cancel Unclaimed Pickup Orders entry for a system at the *View Active Schedules* screen.

Note:

- Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
- Available only if the *Auto Cancel Unclaimed Pickup Orders* schedule is currently enabled, or if there are any auto cancel unclaimed pickup order records that have not been purged.
- History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Options at this screen

Option	Procedure
Search for an auto-cancel process	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed jobs to those that match your entries and click *Search*: • *Job Number* = Optionally, enter an job ID number to display this job only. • *Start Date* = Optionally, enter a date to display jobs that took place on that date. • *Status* = Optionally, select a status of: – *Error* to display a job that ended in error. – *Running* to display a job that is currently running for the system. – *Failed* to display jobs that included any records in error. – *Success* to display jobs that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Understand general errors	If an error occurred for a process itself, it is displayed in the *Error* field.

Fields on this screen

Field	Description
Search fields	
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.
Status	Optionally, select a status from the drop down list and click *Search* to display jobs that are currently in that status. Possible statuses are: • Error ( ): The entire job failed. • Rejected ( ): The job was rejected because another instance of the job was in process. • Running ( ): The job is currently running. • Success ( ): The job ran successfully, even if one or more individual records failed. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running, and then Order Broker restarts it automatically.
Results fields:	

Field	Description
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.
End Date	The date and time when the job ended.
Duration	The amount of time it took for the job to run. HH:MM:SS format, but displayed in MM:SS format if the job took less than an hour.
Submitted By	Indicates how the job was submitted. This could be the ID of the user who submitted or scheduled the process, or the client ID used to authenticate the run job API request message. SYSTEM is displayed here if the job ran successfully through a schedule; however, if a scheduled job was rejected, the ID of the user who scheduled the job is displayed.
Status	Indicates the result of the job: • A green check( ) indicates that the job was successful, even if one or more individual records failed. **Note:** The green check is also displayed if there were no records to process. • A red X ( ) indicates that an error occurred and the job failed. • A yellow triangle ( ) indicates that the job was rejected because another instance of the job was in process. • A running man ( ) indicates that the job is currently running. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	Error message, if any. For example, a message is written when the job status is reset, for example: `Running job status was reset by user SYSTEM on 11/28/2021 04:29 PM.` Up to 255 positions. See Auto Cancel Unclaimed Pickup Orders for background and troubleshooting information.

Completed Order Private Data Purge History

Purpose: Use the **Completed Order Private Data Purge History** screen to review the completed order data purge jobs that have taken place or the one that is currently running, if any.

For more information: See Completed Order Private Data Purge for an overview on the email notifications process and background information.

How to display this screen: Click the history icon ( ) next to the Completed Order Private Data Purge entry at the *View Active Schedules* screen.

> **Note:**
>
> - Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
> - History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Options at this screen

Option	Procedure
Search for a daily cleanup process	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed jobs to those that match your entries and click *Search*: • *Job Number* = Optionally, enter an job ID number to display this job only. • *Start Date* = Optionally, enter a date to display jobs that took place on that date. • *Status* = Optionally, select a status of: – *Error* to display a job that ended in error. – *Running* to display a job that is currently running for the system. – *Failed* to display jobs that included any records in error. – *Success* to display jobs that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Understand general errors	If an error occurred for a process itself, it is displayed in the *Error* field.

Fields on this screen

Field	Description
Search fields	
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.

Field	Description
Status	Optionally, select a status from the drop down list and click *Search* to display jobs that are currently in that status. Possible statuses are: • Error ( ): The entire job failed. • Rejected ( ): The job was rejected because another instance of the job was in process. • Running ( ): The job is currently running. • Success ( ): The job ran successfully, even if one or more individual records failed. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running, and then Order Broker restarts it automatically.
Results fields:	
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.
End Date	The date and time when the job ended.
Duration	The amount of time it took for the job to run. HH:MM:SS format, but displayed in MM:SS format if the job took less than an hour.
Submitted By	Indicates how the job was submitted. Set to the user ID of the user who submitted the job, set to SYSTEM if it ran as scheduled, or set to the client ID used to authenticate the run job API request message.
Status	Indicates the result of the job: • A green check( ) indicates that the job was successful, even if one or more individual records failed. **Note:** The green check is also displayed if there were no records to process. • A red X ( ) indicates that an error occurred and the job failed. • A yellow triangle ( ) indicates that the job was rejected because another instance of the job was already running. • A running man ( ) indicates that the job is currently running. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.

Field	Description
Error	Error message, if any. For example, a message is written when the job status is reset, for example: `Running job status was reset by user SYSTEM on 11/28/2021 04:29 PM.` Up to 255 positions. See *Email Notifications* for background and troubleshooting information.

Daily Clean Up Job History

Purpose: Use the **Daily Clean Up Job History** screen to review the daily cleanup jobs that have taken place or the one that is currently running, if any.

For more information: See *Daily Cleanup* for an overview on the email notifications process and background information.

How to display this screen: Click the history icon ( ) next to the Daily Clean Up entry at the *View Active Schedules* screen.

> **Note:**
>
> - Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
> - History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Options at this screen

Option	Procedure
Search for a daily cleanup process	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed jobs to those that match your entries and click *Search*: • *Job Number* = Optionally, enter an job ID number to display this job only. • *Start Date* = Optionally, enter a date to display jobs that took place on that date. • *Status* = Optionally, select a status of: – *Error* to display a job that ended in error. – *Running* to display a job that is currently running for the system. – *Failed* to display jobs that included any records in error. – *Success* to display jobs that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.

Option	Procedure
Understand general errors	If an error occurred for a process itself, it is displayed in the *Error* field.

Fields on this screen

Field	Description
Search fields	
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.
Status	Optionally, select a status from the drop down list and click *Search* to display jobs that are currently in that status. Possible statuses are: • Error ( ): The entire job failed. • Rejected ( ): The job was rejected because another instance of the job was already running. • Running ( ): The job is currently running. • Success ( ): The job ran successfully, even if one or more individual records failed. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running, and then Order Broker restarts it automatically.
Results fields:	
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.
End Date	The date and time when the job ended.
Duration	The amount of time it took for the job to run. HH:MM:SS format, but displayed in MM:SS format if the job took less than an hour.
Submitted By	Indicates how the job was submitted. Set to the user ID of the user who submitted the job, set to SYSTEM if it ran as scheduled, or set to the client ID used to authenticate the run job API request message.

Field	Description
Status	Indicates the result of the job: • A green check( ) indicates that the job was successful, even if one or more individual records failed. **Note:** The green check is also displayed if there were no records to process. • A red X ( ) indicates that an error occurred and the job failed. • A yellow triangle ( ) indicates that the job was rejected because another instance of the job was already running. • A running man ( ) indicates that the job is currently running. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	Error message, if any. For example, a message is written when the job status is reset, for example: `Running job status was reset by user SYSTEM on 11/28/2021 04:29 PM.` Up to 255 positions. See *Email Notifications* for background and troubleshooting information.

Email Notifications Job History

Purpose: Use the **Email Notifications Job History** screen to review the email notifications jobs that have taken place or the one that is currently running, if any.

Used for the Routing Engine module.

For more information: See *Email Notifications* for an overview on the email notifications process and background information.

How to display this screen: Click the history icon ( ) next to the Email Notifications entry at the *View Active Schedules* screen.

> **Note:**
>
> - Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
> - History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Options at this screen

Option	Procedure
Search for an email notifications process	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed jobs to those that match your entries and click *Search*: • *Job Number* = Optionally, enter an job ID number to display this job only. • *Start Date* = Optionally, enter a date to display jobs that took place on that date. • *Status* = Optionally, select a status of: – *Error* to display a job that ended in error. – *Running* to display a job that is currently running for the system. – *Failed* to display jobs that included any records in error. – *Success* to display jobs that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Understand general errors	If an error occurred for a process itself, it is displayed in the *Error* field.

Fields on this screen

Field	Description
Search fields	
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.
Status	Optionally, select a status from the drop down list and click *Search* to display jobs that are currently in that status. Possible statuses are: • Error ( ): The entire job failed. • Rejected ( ): The job was rejected because another instance of the job was in process. • Running ( ): The job is currently running. • Success ( ): The job ran successfully, even if one or more individual records failed. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running, and then Order Broker restarts it automatically.

Field	Description
Results fields:	
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.
End Date	The date and time when the job ended.
Duration	The amount of time it took for the job to run. HH:MM:SS format, but displayed in MM:SS format if the job took less than an hour.
Submitted By	Indicates how the job was submitted. Set to SYSTEM if the job ran as scheduled, or to the client ID used to authenticate the run job API request message.
Status	Indicates the result of the job: • A green check( ) indicates that the job was successful, even if one or more individual records failed. **Note:** The green check is also displayed if there were no records to process. • A red X ( ) indicates that an error occurred and the job failed. • A yellow triangle ( ) indicates that the job was rejected because another instance of the job was already running. • A running man ( ) indicates that the job is currently running. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	Error message, if any. For example, a message is written when the job status is reset, for example: `Running job status was reset by user SYSTEM on 11/28/2021 04:29 PM.` Up to 255 positions. See *Email Notifications* for background and troubleshooting information.

Generate Pickup Reminder Email History

Purpose: Use the **Generate Pickup Reminder Email History** screen to review summary information on the pickup reminder email generation for an organization.

Used for the Routing Engine module.

How to display this screen: Click the history icon ( ) next to the Generate Pickup Ready Reminder Emails job for an organization at the *View Active Schedules* screen.

Note:

- Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
- Available only if the *Generate Pickup Ready Reminder Emails* job is currently enabled, or if there are any email generation history records that have not been purged.
- If the **Generate Pickup Reminder Email History** screen was already open in another tab when you clicked the history icon, you advance to this screen with the pickup reminder email history of the previously-selected organization displayed.
- History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

For more information: See the *Store Connect Overview* for background.

Options at this screen

Option	Procedure
Search for an reminder email history record	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed jobs to those that match your entries and click *Search*: • *Job Number* = Optionally, enter a job number to display this extract process only. • *Start Date* = Optionally, enter a date to display jobs that started on that date. • *Status* = Optionally, select a status of: – *Error* to display an extract process that ended in error. – *Rejected* if the submitted job was rejected due to a conflict with another instance of the job that was already running. – *Running* to display a job that is currently running for the organization. – *Failed* to display processes that included any records in error. – *Success* to display processes that completed without any errors. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Understand general errors	If an error occurred for the process itself, it is displayed in the *Error* field.

Fields at this screen

Field	Description
Summary fields:	
Organization	The code identifying the *organization* that generated the extract process, and the description of the organization.
Search fields:	
Job Number	A unique ID number assigned by Order Broker to identify a job. Optionally, enter a number and click *Search* to display this process only.
Start Date	Optionally, enter a date to display jobs that started on that date.
Status	Optionally, select a status of: • *Error* to display an extract process that ended in error if, for example, the number of orders to extract exceeded the limit of 500,000. • *Rejected* to display a process that was rejected because another instance of the job was already running. • *Running* to display a process that is currently running for the organization. • *Failed* to display processes that included any records in error. • *Success* to display processes that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Results fields:	**Note:** History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.
Job Number	A unique number assigned by Order Broker to identify a job.
Start Date	The date and time when the process started.
End Date	The date and time when the process ended.
Duration	The amount of time it took for the job to run. HH:MM:SS format, but displayed in MM:SS format if the job took less than an hour.
Submitted By	Indicates how the export was submitted. This could be the ID of the user who submitted or scheduled the process, or the client ID used to authenticate the run job API request message. SYSTEM is displayed here if the job ran successfully through a schedule; however, if a scheduled job was rejected, the ID of the user who scheduled the job is displayed.

Field	Description
Status	Indicates whether any errors occurred for the process: • A running person ( ) indicates that the process is currently running (status = *Running*). • A green check ( ) indicates that no errors occurred (status = *Success*). **Note:** The green check is also displayed if there were no emails to generate. • A yellow triangle ( ) indicates that the job was rejected because another instance of the job was already running. • A red X ( ) indicates that an error occurred (status = *Error*). • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	The error that occurred, if any.
Emails Generated	The total number of pickup reminder emails that were generated.

Fulfilled Inventory Export History

Purpose: Use the **Fulfilled Inventory Export History** screen to review the fulfilled inventory exports that have taken place or are currently running.

Used for the Routing Engine module.

For more information: See *Fulfilled Inventory Export* for an overview on the fulfilled inventory export process and background information.

How to display this screen: Click the history icon ( ) next to the Fulfilled Inventory Export entry for a system at the *View Active Schedules* screen.

> **Note:**
>
> - Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
> - Available only if the *Fulfilled Inventory Export* is currently enabled, or if there are any fulfilled inventory export records that have not been purged.
> - If the **Fulfilled Inventory Export History** screen was already open in another tab when you clicked the history icon, you advance to this screen with the fulfilled inventory export history of the previously-selected organization and system displayed.
> - History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Options at this screen

Option	Procedure

Search for an export process	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed exports to those that match your entries and click *Search*:
	• *Job Number* = Optionally, enter an job ID number to display this export process only.
	• *Start Date* = Optionally, enter a date to display exports that took place on that date.
	• *Status* = Optionally, select a status of:
	  – *Error* to display an export process that ended in error.
	  – *Running* to display an export process that is currently running for the system.
	  – *Failed* to display export processes that included any records in error.
	  – *Success* to display export processes that completed without any errors.
	
	Note:
	You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.

Understand general errors	If an error occurred for an export process itself, it is displayed in the *Error* field.

Fields on this screen

Field	Description
Organization	The code identifying the *organization* associated with the export you selected at the *View Active Schedules* screen is displayed. The description of the organization is to the right.

Field	Description
System	The code identifying the *system* associated with the export you selected at the *View Active Schedules* screen is displayed. The description of the system is to the right.
Search fields	
Job Number	A unique ID number assigned by Order Broker to identify an export process. **Note:** An export is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the export process started.
Status	Optionally, select an export status from the drop down list and click *Search* to display fulfillment exports that are currently in that status. Possible statuses are: • Error ( ): The entire export failed. • Rejected ( ): The export was rejected because another instance of the same job, or of a conflicting job, was in process. See *Schedule Imports* for a listing of jobs that can conflict. • Running ( ): The export is currently running. • Success ( ): The export ran successfully, even if one or more individual records failed. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running, and then Order Broker restarts it automatically.
Results fields:	
Job Number	A unique ID number assigned by Order Broker to identify an export process. **Note:** An export is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the export process started.
End Date	The date and time when the export process ended.
Duration	The amount of time it took for the export to run. HH:MM:SS format, but displayed in MM:SS format if the export took less than an hour.
Submitted By	Indicates how the export was submitted. Set to the user ID of the user who submitted the job, set to SYSTEM if it ran as scheduled, or to the client ID used to authenticate the run job API request message. SYSTEM is displayed here if the job ran successfully through a schedule; however, if a scheduled job was rejected, the ID of the user who scheduled the job is displayed.

Field	Description
Status	Indicates the result of the fulfillment export process: • A green check(✔) indicates that the export was successful, even if one or more individual records failed. **Note:** The green check is also displayed if there were no records to export. • A red X (✖) indicates that an error occurred and the export failed. • A yellow triangle ( ) indicates that the export was rejected because another instance of the same job, or of a conflicting job, was in process. See *Schedule Imports* for a listing of jobs that can conflict. • A running man ( ) indicates that the export is currently running. • A pause icon (⊘) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	Error message, if any. For example, a message is written when the job status is reset, for example: `Running job status was reset by user SYSTEM on 11/28/2018 04:29 PM.` Up to 255 positions. See *Fulfilled Inventory Export* for background and troubleshooting information.
Inventory Records	The total number of fulfilled inventory records in the export.
Inventory Errors	The total number of fulfilled inventory records that failed to export. See *Fulfilled Inventory Export* for background and troubleshooting information.

Incremental Imports History

Purpose: Use **Incremental Imports History** screen to review the incremental inventory imports that have taken place or are currently running.

Used for the Routing Engine module.

For more information: See *Incremental Inventory Import* for an overview on the incremental inventory import process and background information.

How to display this screen: Click the history icon ( ) next to an Incremental Inventory Import entry for a system at the *View Active Schedules* screen.

> **Note:**
>
> - Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
> - Available only if the *Incremental Inventory Import* is currently enabled, or if there are any incremental inventory import records that have not been purged.
> - If the **Incremental Imports History** screen was already open in another tab when you clicked the history icon, you advance to this screen with the incremental imports history of the previously-selected organization and system displayed.
> - History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Options at this screen

Option	Procedure
Search for an import process	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed imports to those that match your entries and click *Search*: • *Job Number* = Optionally, enter an job ID number to display this import process only. • *Start Date* = Optionally, enter a date to display imports that took place on that date. • *Status* = Optionally, select a status of: – *Error* to display an import process that ended in error. – *Running* to display an import process that is currently running for the system. – *Failed* to display import processes that included any records in error. – *Rejected* to display import processes that were rejected because another import process, or a conflicting job, was running. See *Schedule Imports* for a listing of jobs that can conflict. – *Success* to display import processes that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Understand general errors	If an error occurred for an import process itself, it is displayed in the *Error* field.

Fields on this screen

Field	Description
Organization	The code identifying the *organization* associated with the import you selected at the *View Active Schedules* screen is displayed. The description of the organization is to the right.
System	The code identifying the *system* associated with the import you selected at the *View Active Schedules* screen is displayed. The description of the system is to the right.
Search fields	
Job Number	A unique ID number assigned by Order Broker to identify an import process. **Note:** An import is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the import process started.
Status	Optionally, select an import status from the drop down list and click *Search* to display incremental imports that are currently in that status. Possible statuses are: • Error ( ): The entire import failed. • Rejected ( ): The import was rejected because another import, or a conflicting job, was in process. See *Schedule Imports* for a listing of jobs that can conflict. • Running ( ): The import is currently running. • Success ( ): The import ran successfully, even if one or more individual records failed. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running, and then Order Broker restarts it automatically.
Results fields:	
Job Number	A unique ID number assigned by Order Broker to identify an import process. **Note:** An import is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the import process started.
End Date	The date and time when the import process ended.
Duration	The amount of time it took for the incremental import to run. HH:MM:SS format, but displayed in MM:SS format if the import took less than an hour.
Submitted By	Indicates how the import was submitted. This could be the ID of the user who submitted or scheduled the process, or the client ID used to authenticate the run job API request message. SYSTEM is displayed here if the job ran successfully through a schedule; however, if a scheduled job was rejected, the ID of the user who scheduled the job is displayed.

Field	Description
Status	Indicates the result of the incremental import process: • A green check( ) indicates that the import was successful, even if one or more individual records failed. **Note:** The green check is also displayed if there were no records to import. • A red X ( ) indicates that an error occurred and the import failed. • A yellow triangle ( ) indicates that the import was rejected because another import, or a conflicting job, was already running. See *Schedule Imports* for a listing of jobs that can conflict. • A running man ( ) indicates that the import is currently running. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	Error message, if any. For example, a message is written when the job status is reset, for example: `Running job status was reset by user SYSTEM on 11/28/2021 04:29 PM.` Up to 255 positions. See *Incremental Inventory Import* for background and troubleshooting information.
Inventory Records	The total number of inventory records in the import.
Inventory Errors	The total number of inventory records that failed to import. See *Incremental Inventory Import* for background and troubleshooting information.

Identity Cloud User Synchronization History

Purpose: Use **Identity Cloud User Synchronization History** screen to review the identity cloud user synchronization jobs that have taken place or are currently running. The screen displays up to 50 records.

For more information: See *Identity Cloud User Synchronization* for an overview on the identity cloud user synchronization job and background information.

How to display this screen: Click the history icon ( ) next to an Identity Cloud User Synchronization job at the *View Active Schedules* screen.

Options at this screen

> **Note:**
>
> - Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
> - Available only if there are any identity cloud service synchronization records that have not been purged.
> - History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Option	Procedure
Search for a synchronization job	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed synchronization jobs to those that match your entries and click *Search*: • *Job Number* = Optionally, enter an job ID number to display this synchronization job only. • *Start Date* = Optionally, enter a date to display synchronization jobs that took place on that date. • *Status* = Optionally, select a status of: – *Error* to display a synchronization job that ended in error. – *Running* to display a synchronization job that is currently running for the system. – *Rejected* because another instance of the job was already running. – *Failed* to display synchronization jobs that included any records in error. – *Success* to display synchronization jobs that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Understand general errors	If an error occurred for a synchronization job itself, it is displayed in the *Error* field.

Fields on this screen

Field	Description
Search fields	
Job Number	A unique ID number assigned by Order Broker to identify a synchronization job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the synchronization job started.

Field	Description
Status	Optionally, select a job status from the drop down list and click *Search* to display jobs that are currently in that status. Possible statuses are: • Error ( ): The entire job failed. • Rejected ( ): The job was rejected because another synchronization was in process. • Running ( ): The job is currently running. • Success ( ): The job ran successfully, even if one or more individual records failed. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running, and then Order Broker restarts it automatically.
Results fields:	
Job Number	A unique ID number assigned by Order Broker to identify a synchronization job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the job started.
End Date	The date and time when the job ended.
Duration	The amount of time it took for the job to run. HH:MM:SS format, but displayed in MM:SS format if the job took less than an hour.
Submitted By	Indicates how the job was submitted. This could be the ID of the user who submitted or scheduled the job, or the client ID used to authenticate the run job API request message.
Status	Indicates the result of the synchronization job: • A green check( ) indicates that the synchronization was successful, even if one or more individual records failed. **Note:** The green check is also displayed if there were no records to synchronize. • A red X ( ) indicates that an error occurred and the job failed. • A yellow triangle ( ) indicates that the synchronization was rejected because another synchronization job was already running. Only one synchronization job can run at the same time. • A running man ( ) indicates that the synchronization job is currently running. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.

Field	Description
Error	Error message, if any. For example, a message is written when the job status is reset, for example: `Running job status was reset by user SYSTEM on 11/28/2021 04:29 PM.` Up to 255 positions. *Identity Cloud User Synchronization*
Inventory Records	The total number of records in the synchronization.
Inventory Errors	The total number of records that failed to synchronize. See *Identity Cloud User Synchronization* for background and troubleshooting information.

Inventory Quantity Export History

Purpose: Use the **Inventory Quantity Export History** screen to review the inventory quantity exports that have taken place or are currently running.

Used for the Routing Engine module.

For more information: See *Fulfilled Inventory Quantity Export* for an overview on the inventory quantity export process and background information.

How to display this screen: Click the history icon ( ) next to the Inventory Quantity Export entry for a system at the *View Active Schedules* screen.

Note:

- Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
- Available only if the *Fulfilled Inventory Quantity Export* is currently enabled, or if there are any inventory quantity export records that have not been purged.
- If the **Inventory Quantity Export History** screen was already open in another tab when you clicked the history icon, you advance to this screen with the inventory quantity export history of the previously-selected organization and system displayed.
- History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Options at this screen

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>Search for an export process</td><td>Use the Job Number, Start Date, or Status fields to restrict the displayed exports to those that match your entries and click Search:

Job Number = Optionally, enter an job ID number to display this export process only.
Start Date = Optionally, enter a date to display exports that took place on that date.
Status = Optionally, select a status of:

Error to display an export process that ended in error.
Running to display an export process that is currently running for the system.
Failed to display export processes that included any records in error.
Rejected to display export processes that were rejected because the job, or a conflicting job, was already running. See Schedule Imports for a listing of jobs that can conflict.
Success to display export processes that completed without any errors.

Note:
You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
</td></tr>
<tr><td>Understand general errors</td><td>If an error occurred for an export process itself, it is displayed in the Error field.</td></tr>
</table>

Fields on this screen

Field	Description
Organization	The code identifying the *organization* associated with the export you selected at the *View Active Schedules* screen is displayed. The description of the organization is to the right.
System	The code identifying the *system* associated with the export you selected at the *View Active Schedules* screen is displayed. The description of the system is to the right.
Search fields	
Job Number	A unique ID number assigned by Order Broker to identify an export process. **Note:** An export is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the export process started.

Field	Description
Status	Optionally, select an export status from the drop down list and click *Search* to display inventory quantity exports that are currently in that status. Possible statuses are: • Error ( ): The entire export failed. • Rejected ( ): The export was rejected because another inventory quantity export, or a conflicting job, was in process. See *Schedule Imports* for a listing of jobs that can conflict. • Running ( ): The export is currently running. • Success ( ): The export ran successfully, even if one or more individual records failed. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running, and then Order Broker restarts it automatically.
Results fields:	
Job Number	A unique ID number assigned by Order Broker to identify an export process. **Note:** An export is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the export process started.
End Date	The date and time when the export process ended.
Duration	The amount of time it took for the export to run. HH:MM:SS format, but displayed in MM:SS format if the export took less than an hour.
Submitted By	Indicates how the export was submitted. This could be the ID of the user who submitted or scheduled the process, or the client ID used to authenticate the run job API request message. SYSTEM is displayed here if the job ran successfully through a schedule; however, if a scheduled job was rejected, the ID of the user who scheduled the job is displayed.

Field	Description
Status	Indicates the result of the inventory quantity export process: • A green check( ) indicates that the export was successful, even if one or more individual records failed. **Note:** The green check is also displayed if there were no records to export. • A red X ( ) indicates that an error occurred and the export failed. • A yellow triangle ( ) indicates that the export was rejected because another inventory quantity export, or a conflicting job, was already running.See *Schedule Imports* for a listing of jobs that can conflict. • A running man ( ) indicates that the export is currently running. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	Error message, if any. For example, a message is written when the job status is reset, for example: `Running job status was reset by user SYSTEM on 11/28/2021 04:29 PM.` Up to 255 positions. See *Fulfilled Inventory Export* for background and troubleshooting information.
Inventory Records	The total number of inventory quantity records in the export.
Inventory Errors	The total number of inventory quantity records that failed to export. See *Fulfilled Inventory Export* for background and troubleshooting information.

Product Imports History

Purpose: Use the **Product Imports History** screen to review summary information on the product, product location, location, and UPC imports that have taken place for a system. See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for an overview of the import process.

Used for the Routing Engine module.

How to display this screen: Click the history icon ( ) next to a Product Import entry for a system at the *View Active Schedules* screen.

> **Note:**
>
> - Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
> - Available only if the Product Import is currently enabled, or if there are any product import records that have not been purged.
> - If the **Product Imports History** screen was already open in another tab when you clicked the history icon, you advance to this screen with the product imports history of the previously-selected organization and system displayed.
> - History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Reviewing import errors:

- *Reports:* Use the *Location Import Errors Report*, *Product Import Errors Report*, and *Product Barcode Import Errors Report* to review any errors that occurred related to location, product, or barcode imports.
- *Error files:* Errors related to product location imports are tracked in an import error flat file that is available through the file storage API. See *Product Location Import Error Files* for more information.

> **Note:**
>
> Some errors that can occur from the data in the import file are not written to the related import database table, so in that case the error is noted only in the error file or record, and not on the related report, for example: an invalid number of columns in the import file, a numeric field that contains alphabetical data, or a date that is not formatted correctly.

Options at this screen

Option	Procedure
Search for an import process	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed imports to those that match your entries and click *Search*: • *Job Number* = Optionally, enter an import ID number to display this import process only. • *Start Date* = Optionally, enter a date to display imports that took place on that date. • *Status* = Optionally, select a status of: – *Error* to display an import process that ended in error. – *Rejected* to display an import process that was rejected because another instance of the same job, or of a conflicting job, was in process. See *Schedule Imports* for a listing of jobs that can conflict. – *Running* to display an import process that is currently running for the system. – *Failed* to display import processes that included any records in error. – *Success* to display import processes that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Understand general errors	If an error occurred for an import process itself, it is displayed in the *Error* field.

Fields at this screen

Field	Description
Summary fields:	
Organization	The code identifying the *organization* associated with the system that generated the import process. The organization description is to the right of the organization code, separated by a hyphen.
System	The code identifying the *system* that generated the import process, either because you ran it on demand from the *Schedule Jobs* screen, or it was scheduled at that screen. This is the system you selected at the *Schedule Jobs* screen. The system description is to the right of the system code, separated by a hyphen.
Job Number	A unique ID number assigned by Order Broker to identify an import process. Optionally, enter a number and click *Search* to display this import process only.
Search fields:	

Field	Description
Start Date	Optionally, enter a date to display imports that started on that date.
Status	Optionally, select a status of: • *Error* to display an import process that ended in error. • *Rejected* to display an import process that was rejected because another import, or a conflicting job, was in process. See *Schedule Imports* for a listing of jobs that can conflict. • *Running* to display an import process that is currently running for the system. • *Failed* to display import processes that included any records in error. • *Success* to display import processes that completed without any errors. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Results fields:	**Note:** Records are retained for the *Job History* days specified at the *Tenant-Admin* screen.
Job Number	A unique ID number assigned by Order Broker to identify an import process. **Note:** An import is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Start Date	The date and time when the import process started.
End Date	The date and time when the import process ended.
Duration	The amount of time, in minutes and seconds, that the import process ran. HH:MM:SS format, but displayed in MM:SS format if the import took less than an hour.
Submitted By	Indicates how to import was submitted. This could be the ID of the user who submitted or scheduled the process, or the client ID used to authenticate the run job API request message. SYSTEM is displayed here if the job ran successfully through a schedule; however, if a scheduled job was rejected, the ID of the user who scheduled the job is displayed.

Field	Description
Status	Indicates whether any product or product location errors occurred for the import process: • A running person ( ) indicates that the import process is currently running. • A green check ( ) indicates that no errors occurred (status = *Success*). **Note:** The green check is also displayed if there were no records to import. • A yellow triangle ( ) indicates that the import was rejected because another import, or a conflicting job, was in process. See *Schedule Imports* for a listing of jobs that can conflict. • A red X ( ) indicates that an extract error or at least one product, product location, location, or product UPC barcode import error occurred. Use the *Location Import Errors Report*, *Product Import Errors Report*, and *Product Barcode Import Errors Report* to review location, product, product location, or product UPC barcode errors. See the *Error* field for additional reasons why an import might fail. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	Indicates the general error, if any, that prevented the product import from taking place. If this field indicates *Error importing file. See error file for details*, this could indicate that at least one of the import files included invalid data, such as: • the wrong number of columns • alphabetical characters for a numeric field • an incorrectly formatted date • data that exceeds the maximum length of the field in the database In this case, the process moves the file to the error container in the FILE_STORAGE table. This field indicates *Error importing from OCDS. See error log for details* if errors occurred during *OCDS or Merchandising Omni Services Imports*. See that help topic for more information. **Note:** General errors are not included in the *Product Import Errors Report*, and *Product Barcode Import Errors Report*, in the case of the *Location Import Errors Report*, some general errors are included on the report with the description `Location Import Failed - Other Error`.
Type	Indicates that the top row for the following columns lists the number of records *Processed*, while the bottom row for the following columns lists the number of records *Errored*.

Field	Description
Product Records	Top row: The total number of product records included in the import process, including any records that were in error. Bottom row: The total number of product import records that were in error. If there were any errors, you can use the *Product Import Errors Report* to review them.
Inventory Records	Top row: The total number of product location records that included in the import process, including any records that were in error. Bottom row: The total number of product location import records that were in error. See *Product Location Import Error Files* for more information.
Location Records	Top row: The total number of location records included in the import process, including any records that were in error. Bottom row: The total number of location import records that were in error. If there were any errors, you can use the *Location Import Errors Report* to review them.
UPC Records	Top row: The total number of product UPC barcode records included in the import process, including any records that were in error. Bottom row: The total number of product UPC barcode import records that were in error. If there were any errors, you can use the *Product Barcode Import Errors Report* to review them.
Image Records	Top row: The total number of product image records included in the import process, including any records that were in error. Product images are displayed in Store Connect. Bottom row: The total number of product image import records that were in error. A product import image record could be in error because the URL for the image was not formatted correctly. See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for an overview.

Sales Order Data Extract Job History

Purpose: Use the **Sales Order Data Extract Job History** screen to review summary information on the sales order data extracts that have taken place for an organization.

Used for the Routing Engine module.

How to display this screen: Click the history icon () for an organization at the *View Active Schedules* screen.

> **Note:**
>
> - Only users with *View Active Schedules* authority can display this screen. See the *Role Wizard* for more information.
> - Available only if the *Sales Order Data Extract* is currently enabled, or if there are any data extract records that have not been purged.
> - If the **Sales Order Data Extract Job History** screen was already open in another tab when you clicked the history icon, you advance to this screen with the order data extract history of the previously-selected organization displayed.
> - History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Maximum number of orders: The extract fails if the total number of orders to extract exceeds 500,000. If this occurs, use the Extract Orders with Activity From and To at the *Schedule Jobs* screen to run the extract for smaller segments by specifying date ranges to include each time, rather than including all orders.

For more information: See the *Sales Order Data Extract* for information on generating the extract, and see *Sales Order Data Extract Files* for information on the data included in the extract files.

Options at this screen

Option	Procedure
Search for an extract process	Use the *Job Number*, *Start Date*, or *Status* fields to restrict the displayed extract to those that match your entries and click *Search*: • *Job Number* = Optionally, enter an extract job number to display this extract process only. • *Start Date* = Optionally, enter a date to display extracts that started on that date. • *Status* = Optionally, select a status of: – *Error* to display an extract process that ended in error. – *Rejected* if the submitted export was rejected due to a conflict with another instance of the job that was already running. – *Running* to display an extract process that is currently running for the organization. – *Failed* to display extract processes that included any records in error. – *Success* to display extract processes that completed without any errors. **Note:** You cannot select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.

Option	Procedure
Understand general errors	If an error occurred for an extract process itself, it is displayed in the *Error* field. This might occur if, for example, the number of orders to extract exceeded the limit of 500,000.

Fields at this screen

Field	Description
Summary fields:	
Organization	The code identifying the organization that generated the extract process, and the description of the organization.
Search fields:	
Job Number	A unique ID number assigned by Order Broker to identify an export job. Optionally, enter a number and click *Search* to display this export process only.
Start Date	Optionally, enter a date to display extracts that started on that date.
Status	Optionally, select a status of: • *Error* to display an extract process that ended in error if, for example, the number of orders to extract exceeded the limit of 500,000. • *Rejected* to display an extract process that was rejected because another instance of the job was already running. • *Running* to display an extract process that is currently running for the organization. • *Failed* to display extract processes that included any records in error. • *Success* to display extract processes that completed without any errors. **Note:** You can select a status of Paused; however, a job stays in this status only briefly when it switches to another server to complete running.
Results fields:	**Note:** History is retained for the number of days specified in the *Job History* retention setting at the Tenant-Admin screen.
Job Number	A unique number assigned by Order Broker to identify an export process.
Start Date	The date and time when the export process started.
End Date	The date and time when the export process ended.
Duration	The amount of time it took for the export to run. HH:MM:SS format, but displayed in MM:SS format if the export took less than an hour.

Field	Description
Submitted By	Indicates how the export was submitted. This could be the ID of the user who submitted or scheduled the process, or the client ID used to authenticate the run job API request message. SYSTEM is displayed here if the job ran successfully through a schedule; however, if a scheduled job was rejected, the ID of the user who scheduled the job is displayed.
Status	Indicates whether any errors occurred for the export process: • A running person ( ) indicates that the export process is currently running (status = *Running*). • A green check ( ) indicates that no errors occurred (status = *Success*). **Note:** The green check is also displayed if there were no records to export. • A yellow triangle ( ) indicates that the job was rejected because another instance of the job was already running. • A red X ( ) indicates that an error occurred (status = *Error*). • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This status might be displayed only briefly.
Error	The error that occurred, if any.
Order Records	The total number of order records included in the export process. This total can include both sales orders and purchase orders.

View Job History

Purpose: Use the **View Job History** screen to review jobs that have run.

History icon always shown: The history icon to review job history is available for all jobs listed on this screen, regardless of whether the Schedule Enabled flag at the Schedule Jobs screen is selected for the job. However, history is available for review only if the job has run at least once, and it has any history records that have not been purged.

The screen displays up to 100 job history records in reverse chronological order (newest to oldest). If necessary, use the search fields at the top of the screen to restrict the displayed job history records.

How to display this screen: Select *View Job History* from the *Systems Menu*. The landing page does not have a shortcut to this screen.

> **Note:**
>
> Only users with View Job History authority can display this screen. See the *Role Wizard* for more information.

History screens for individual jobs: You can also use the history icon ( ) at the *View Active Schedules* screen to advance to a screen displaying all unpurged history records for the selected job. See that screen for more information.

History is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

Options at this screen

Option	Procedure
search for a job history record	Optionally, select a *Job Name*, *Organization*, and/or *System*, *Start Date*, or *End Date*, and click *Search* to display the scheduled job. **Note:** Searching by organization or system is supported only for jobs that are specific to an organization or system. See the *Job Name* field a summary description of each job.
refresh the displayed information	Click *Search*.

Fields at this screen

Field	Description
Search fields:	

Field	Description
Job Name	A job that has run at least once, and not all history has been purged. Optionally, select a listed job and select *Search* to display the history records for that job. Jobs that can be displayed here are: *Auto Cancel Unclaimed Pickup Orders:* Cancels unclaimed pickup or ship-for-pickup orders based on the settings of the *Auto Cancel Days of Unclaimed Pickup Orders* and *Auto Cancel Days of Unclaimed Ship For Pickup Orders* at the **Preferences** screen. This job runs daily at a specified time. See *Auto-Cancel Unclaimed Orders* for a discussion. *Completed Order Private Data Purge:* Anonymizes customer data on sales orders that closed (fulfilled, canceled, unfulfillable, completed) and purchase orders that have been closed (shipped, complete, or canceled) and that are older than a specified number of days. See *Completed Order Private Data Purge* for a discussion. *Daily Clean Up:* Clears outdated information on a daily basis. See the *Daily Clean Up* job for details. This job runs daily at a specified time. *Email Notifications:* Generates email notifications to store locations, vendors, customers, retailers, or systems operations staff based on the unprocessed records that are currently in the EMAIL_NOTIFICATION table. This job runs at the specified minute interval: for example, generate email notifications every 5 minutes. See the *Email Notifications* job for details. *Fulfilled Quantity Export:* Generates a pipe-delimited file of recent order fulfillments, so the inventory system of record can use this information to update its own inventory based on activity in Order Broker. See the *Fulfilled Inventory Export* job for details. *Generate Pickup Ready Reminder Emails:* Generates pickup-ready reminder emails to customers whose pickup orders have not been picked up within the number of *Aged Hours* defined for the job. See the *Generate Pickup Ready Reminder Emails* job for details. *Identity Cloud Service Synchronization:* Creates users in Order Broker based on the data that has been set up in IDCS or OCI IAM. See the *Identity Cloud User Synchronization* job for details. *Incremental Inventory Import:* Uses the contents of a pipe-delimited import file to update product location records for the system. See the *Incremental Inventory Import* job for details. *Inventory Quantity Export:* Creates a pipe-delimited export file providing the current totals for products or product locations based on updates to product location quantities, including applying probable quantity or probability rules. Also, supports a web service to respond to requests for current inventory quantity changes based on probability rules. See the *Inventory Quantity Export* job for details. *Product Import:* Imports and updates information that includes products, system products, product locations, locations, and product barcodes. See the *Product Import* job for details. *Sales Order Data Extract:* Creates export files containing data related to orders with any activity within a specified date range. See the *Sales Order Data Extract* for details. Jobs that are not flagged as enabled at the *Schedule Jobs* screen are not listed in the results here.

Field	Description
Organization	See *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. Filtering displayed jobs based on organization takes place only for the jobs that are associated with a specific organization: these are the Probable Quantity Export, Fulfilled Quantity Export, Product Import, Probable Quantity Export, and Incremental Inventory Import, and Sales Order Data Extract.
System	See *system*. Optionally, select a system the drop down list in order to display jobs run for the selected system. If you first select an Organization, only systems associated with that organization are displayed. Filtering jobs based on organization takes place only for the jobs that are associated with a specific system: these are the Probable Quantity Export, Fulfilled Quantity Export, Product Import, Probable Quantity Export, and Incremental Inventory Import.
Start Date	The date and time when the job started.
End Date	The date and time when the job ended.
Results fields:	
Job Name	See the *Job Name*, above, for information.
Job Number	A unique ID number assigned by Order Broker to identify a job. **Note:** A job is associated with a single job number, regardless of whether Order Broker breaks it out into multiple batches for processing.
Organization	The *organization* code is displayed only for jobs related to a specific organization: these are the Probable Quantity Export, Fulfilled Quantity Export, Product Import, Probable Quantity Export, and Incremental Inventory Import, and Sales Order Data Extract.
System	The code identifying the *system* associated with the scheduled job. The system code is displayed only for those jobs related to a specific system: these are the Probable Quantity Export, Fulfilled Quantity Export, Product Import, Probable Quantity Export, and Incremental Inventory Import.
System Name	The name describing the system.
Start Date	The date and time when the job started.
End Date	The date and time when the job ended.
Duration	The number of minutes and seconds it took the job to run, in MM:SS format. Displayed only for the Incremental Inventory Import, Product Import, and Sales Order Extract.
Submitted By	Indicates how the job was submitted. This could be the ID of the user who submitted or scheduled the process, or the client ID used to authenticate the run job API request message. SYSTEM is displayed as the user ID if the job ran successfully through a schedule; however, if a scheduled job was rejected, the ID of the user who scheduled the job is displayed.

Field	Description
Status	Indicates the result of the most recent import process: • A green check ( ) indicates that no errors occurred. **Note:** The green check is also displayed if there were no records to import. • A red X ( ) indicates that an error occurred for at least one record in the import. • A yellow triangle ( ) indicates that the import was rejected because another instance of the same job, or of a conflicting job, was in process. See *Schedule Imports* for a listing of jobs that can conflict. • A running man ( ) indicates that the import is currently running. • A pause icon ( ) indicates that the job has paused briefly while it switches to another server to finish running. This field is blank if you have not yet run the import process for the system, or if the job is anything other than the Incremental Inventory Import, Product Import, Inventory Quantity Export, or Sales Order Data Extract.

Schedule Jobs

Purpose: Use the **Schedule Jobs** screen to work with scheduled jobs.

Displaying the jobs available to schedule: Use the folders on the left-hand pane to display the related jobs available for scheduling:

- *Data Hygiene* folder: Includes the *Completed Order Private Data Purge* job and the *Daily Clean Up* job.
- *Exports* folder: Includes the *Fulfilled Inventory Export*, *Inventory Quantity Export*, and *Sales Order Data Extract* jobs.
- *Imports* folder: Includes the *Identity Cloud User Synchronization*, *Incremental Inventory Import*, and *Product Import* jobs.
- *Orders* folder: Includes the *Auto Cancel Unclaimed Pickup Orders* job, the *Email Notifications* job, and the *Generate Pickup Ready Reminder Emails* job.

Highlight a job in the left-hand pane to display schedule information and options in the right-hand area.

See each job below for more information.

Resolving scheduling issues: The *Reschedule All* option at the *View Active Schedules* screen stops and restarts the schedules for all jobs in the case of an unexpected interruption. Also, you use this option to start running all scheduled jobs and programs when first configuring Order Broker, or after an upgrade is applied.

Note that the *Reschedule All* option does not restart jobs that are in Paused status (⊘). Jobs stay in Paused status only briefly before Order Broker restarts them automatically.

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

Dates and times: The dates and times are based on the *retailer's time*, which may be different from your local time zone. As a result, you need to calculate the difference between your local time and the system time to have the scheduled import take place at the desired time.

Job notifications: If the *Event Notifications* settings are configured at the *Event Logging* screen, a job notification message is generated each time one of the scheduled jobs runs. See *Event Notifications* settings and the *Job Notification Messages* appendix of the Operations Guide for more information.

Status email: If a job for a specific system is rejected because a conflicting job was already running, Order Broker generates a status email to the *Administrative Email* specified at the *Event Logging* screen, indicating:

- System Code: The system submitting the job.
- Blocking System Code: The system that submitted the job that blocked the job.
- Date/Time File Rejected
- Run By: The user ID of the person who submitted the job, or set to SYSTEM if the job was scheduled.

Which jobs conflict? You cannot run any of the following jobs at the same time:

- *Inventory Quantity Export*
- *Incremental Inventory Import*
- *Product Import*

Run Job API: You can also use the Run Job API to submit a job, as an alternative to submitting the job on demand or scheduling it at this screen. See the *Operations Guide* for background.

In this topic:

Data Hygiene Folder:

- *Completed Order Private Data Purge*
- *Daily Clean Up*

Exports Folder:

- *Fulfilled Inventory Export*
- *Inventory Quantity Export*
- *Sales Order Data Extract*

Imports Folder:

- *Identity Cloud User Synchronization*

- *Incremental Inventory Import*
- *Product Import*

Orders Folder:

- *Auto Cancel Unclaimed Pickup Orders*
- *Email Notifications*
- *Generate Pickup Ready Reminder Emails*

Fields at this Screen

How to display this screen: Select *Schedule Jobs* from the *Systems Menu*. The landing page does not have a shortcut to this screen.

> **Note:**
>
> Only users with Schedule Jobs authority can display this screen. See the *Role Wizard* for more information.

Completed Order Private Data Purge

The Completed Order Private Data Purge job in the Data Hygiene folder anonymizes customer data on sales orders that closed (fulfilled, canceled, unfulfillable, completed) and purchase orders that have been closed (shipped, complete, or canceled) and that are older than the number of days specified in the Days Old field.

If the same external order number is assigned to multiple sales or purchase orders, each purchase order is purged only if is closed and is older than the retention days. For example, order number 12345 is assigned to two purchase orders created on February 1 and another was created on February 6. If the current date is February 15 and the retention days is set to 10, then the third purchase order cannot yet be purged.

The order's age is calculated based on the CREATE_TIMESTAMP from the XOM_ORDER table or the CREATED_DATE from the PO_HEADER table. This is the date and time when Order Broker created the sales order or purchase order, which might be different from when the order was created in the originating system.

About anonymization: When the customer data is anonymized, all information is replaced with asterisks. Anonymized data cannot be recovered. Data that is anonymized includes sold-to and ship-to customer names, address, email addresses, and phone numbers for sales orders and purchase orders. Even if a field, such as one of the address lines, did not previously contain data, the purge populates the field with asterisks. See *Anonymizing Data* for a discussion.

A Transaction Note is written for each order line: Private Data Anonymized.

Scheduling the Completed Order Data Purge

- Select the *Day of Week* when the job should run.
- Enter the *Time* when the job should run in 24-hour format (HH:MM).
- Enter the Days Old an order or purchase order must be to be eligible for anonymization.
- Select *Schedule Enabled*.
- Select *Save*.

- Select *Cancel* to exit the screen.

Optionally, select Run Now to run the job immediately.

Orders across all organizations are anonymized.

Completed Order Data Purge Fields

- *Schedule Enabled*
- *Schedule Interval*: Set to *Weekly*. Display-only.
- *Day of Week*
- *Time*
- Days Old: The number of days old a completed order must be to be eligible for purge.
- Run Now
- *Last Updated*
- *Last Run*
- *Next Run*

History: Use the *Completed Order Private Data Purge* screen to review completed order data purge jobs that have run.

For more information: See the *Operations Guide* for information on web service requests that support inquiring on private data and requesting to anonymize it.

Daily Clean Up

The Daily Clean Up job in the Daily Hygiene folder clears outdated information, including:

- Pack slip records generated through the Vendor Portal, after the number of days specified in the Pack Slip Files field under *Retention Settings* at the **Tenant-Admin** screen.
- Reports, after the number of days specified in the File Storage field under *Retention Settings* at the **Tenant-Admin** screen.
- File storage records, after the number of days specified in the File Storage field under *Retention Settings* at the **Tenant-Admin** screen.
- Pack slip records generated through Store Connect, after one day.
- Shipping label records generated for integrated shipping with ADSI, in either the Vendor Portal or Store Connect, after one day.
- Email notification records, after three days.
- Product import error files and part files, after the number of days specified in the Product Import Error Files field under *Retention Settings* at the **Tenant-Admin** screen, if Cloud Storage is used.
- Records in the RICS_LOG table of messages between Order Broker and Oracle Retail Integration Cloud Service (RICS), based on the number of days specified in the RICS Log History field under *Retention Settings* at the **Tenant-Admin** screen. See *Order Fulfillment through RICS Integration* for background.

  RICS log records whose Retry Status is *Failed* are not eligible to be purged.
- Job history records which are older than the *Job History* setting at the *Tenant-Admin* screen. See the *View Job History* screen to review job history.

- Audit records for audited tables that have exceeded the audit retention days specified in the CTL_APP_CONFIG table in the database. The retention days is set 183 days (6 months) by default, and is not displayed on any screen. The audited tables include Preferences, Preference Overrides, Drop Ship Preferences, Job Schedule, System, and Web Service Users. Contact your Oracle support representative if the retention setting needs to be changed.
- Shopping logic trace records shopping logic trace records for closed, completed, canceled, and unfulfillable orders, when the records are older than the number of days specified in the Trace Log History field under *Retention Settings* at the **Tenant-Admin** screen. screen, if shopping logic tracing is enabled; see *Trace Shopping Log* for background.
- Records in the XOM_ITEM_DUPLICATE table that are older than 180 days. This table contains a record for each order line that was not created in Order Broker because a duplicate was found. Duplicate records are retained for 180 days for troubleshooting by Oracle Support.
- Records in the XOM_ITEM_DUP_CHECK table that are older than 2 days. This table contains a record of each submitted order, which is used temporarily only for the duplicate checking process before order creation.

Scheduling the Daily Clean Up Job

1. Enter the *Time* in 24-hour format (HH:MM) when the job should run.
2. Optionally, select *Schedule Enabled*.
3. Optionally, select Run Now to run the job immediately.
4. Select *Save*.
5. Select *Cancel* to exit the screen.

Daily Clean Up Fields

- *Schedule Enabled*
- *Schedule Interval* : Set to *Daily*. Display-only.
- *Time*
- Run Now
- *Last Updated*
- *Last Run*
- *Next Run*

Daily Cleanup History: Use the *Daily Clean Up Job History* screen to review daily cleanup jobs that have run.

For more information: See the *Tenant-Admin* screen for information on *Retention Settings* fields.

Fulfilled Inventory Export

Purpose: Use the Fulfilled Inventory Export to generate a pipe-delimited file of recent order fulfillments, so the inventory system of record can use this information to update its own inventory based on activity in Order Broker.

Export updates: The export program:

- identifies each order line within the system since the last time the export was run, based on the export update date and time in the xom_status_history table:
  - delivery and pickup orders: the order line assigned to the location for fulfillment has gone into **fulfilled** status
  - ship-for-pickup orders: the order line assigned to the location for sourcing (transferring or shipping the item to the pickup location) has gone into **intransit** status
- for each order line whose fulfilled or intransit quantity was included in the export, updates the export update date and time in the xom_status_history table
- for each product location included in the export:
  - if the Track Fulfilled Quantity setting is *Reset During Inventory Export*, sets the *Fulfilled Quantity* to 0
  - decreases the *Available Quantity* by the total quantity of fulfilled order lines included in the export, based on the quantity from the xom_status_history table
  - updates the Last Updated Date for the product location
- generates the export file, creating the export record in the FILE_STORAGE table. The CONTAINER setting for the record is OROB-EXPORT. You can use the File Storage API to download export file records from the FILE_STORAGE table. See *File Storage API for Imports and Exports* for details.

Fulfilled Inventory Export History: Use the *Fulfilled Inventory Export History* screen to review fulfilled inventory exports that have run.

For more information: See the *Fulfilled Inventory Export File*.

Fulfilled quantity used in availability calculation: Both the *Reserved Quantity* and the *Fulfilled Quantity* are subtracted from the product location's *Available Quantity* when calculating the *Available to Promise* quantity. See *Calculating the Available to Promise Quantity* for an overview.

Typically, you would set the *Track Fulfilled Quantity* field at the System screen to *Reset During Inventory Export*. See that field.

Fulfilled Inventory Export File

- *File format:* The file is pipe-delimited (|).
- *File location:* The FILE_STORAGE table.
- *File naming:* Named `FULFILLED_QUANTITY_EXTRACT_SYSCD_220831_165819.csv`, where `SYSCD` is the code for the system, and `150831_165819` the date (August 31, 2022) and time when the file was created, in the retailer's time.

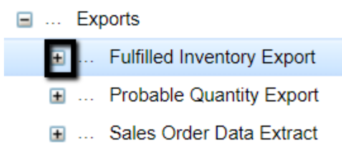
File contents:

- *Location code:* The code identifying the location that shipped the delivery order, where the pickup order was picked up, or that shipped or transferred the ship-for-pickup order.
- *Order type:* Either DELIVERY, PICKUP, SHIPFORPICKUP.
- *Order number:* The number or code identifying the order in the originating system.
- *System product code:* The number or code identifying the item in the fulfilling system.
- *Quantity fulfilled:* The quantity of the item shipped, picked up, or in transit.
- *Unit price:* The unit price of the item on the order.

- *Date and time:* The date and time when the item was shipped or picked up. YYYY-MM-DDTHH:MM:SS:XXX format, where XXX is milliseconds (for example, 2022-11-15T16:15:34.710).

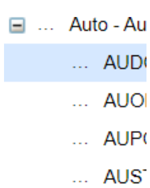
Scheduling the Fulfilled Inventory Export

- Click the plus sign next to the Fulfilled Inventory Export job in the left-hand panel to display a list of existing organizations.



> **Note:**
>
> The list of organizations is available only if Use Routing Engine is selected at the *Tenant-Admin* screen.

- Click the organization whose fulfilled inventory data should be extracted. When you select an organization, the systems within the organization are displayed.



- When you select an organization, the *Fulfilled Inventory Export Fields* are displayed to the right.
- Select one or more *Days of Week* when the job should run.
- Use the *Time* field to enter each time when the job should run, in 24-hour format (HH:MM). If entering multiple times, separate each with a comma and no spaces.
- Optionally, select *Run Now* to run the job immediately.
- Optionally, select *Schedule Enabled*.
- Select *Save*.
- Select *Cancel* to exit the screen.

Fulfilled Inventory Export Fields

- *organization*
- *system*
- *Schedule Enabled*
- *Schedule Interval*: Set to *Day(s) of Week*. Display-only.
- *Time*

- *Run Now*

Job Summary

- *Last Updated*
- *Last Run*
- *Next Run*

Inventory Quantity Export

The different options for calculating the available quantity for inventory export include using probable quantity rules; using probability rules; and not using rules. The required settings for each are described below.

> **Important:**
>
> Configure the export for *only one system* in your organization to support the export for all eligible systems within the organization. The selected system does not need to be the organization default.

Difference between probable quantity rules and probability rules: Probable quantity rules are used only to calculate the probable quantity to pass to an integrated system, such as an ecommerce site, while probability rules apply dynamically to determine the available quantity when Order Broker receives a request, such as a Submit Order request or a Locate Items request.

Use probability rules for the inventory quantity update to provide a consistent calculation both interactively and through the batch updates described here.

- *Typical Inventory Quantity Export Usage*
- *Scheduling the Inventory Export*
- *Inventory Quantity Rules Settings*
- *Summary of Inventory Quantity Export Fields*
- *Probability Rules Update and Incremental Quantity Web Service*
- *Probable Quantity Update and Export*
  - *Aggregate by Product*
  - *Probable Quantity*
  - *Evaluating Probable Quantity Rules*
  - *Probable Quantity Export File Layout and Contents*
- *Inventory Quantity Export Using Available to Promise Quantity (No Rules)*

Typical Inventory Quantity Export Usage

An example of how you might use the inventory quantity export would be an ecommerce system that requires an estimate of availability for display at the ecommerce site:

- System *A* is your ecommerce system. For this system:
  - The *Inventory Qty Export* flag is not selected, because the system does not require its own product locations in the export file.

  - At the Inventory Quantity Export settings at the *Schedule Jobs* screen, the Enabled flag is selected, a schedule is defined, and a *Safe Stock Method* method is selected.
- Systems *B* and *C* are additional systems in your organization that can fulfill orders. For these systems, the *Inventory Qty Export* flag is selected, because updated inventory should be included in the inventory quantity export file.
- If the *Safe Stock Method* is set to *Probable Quantity Rules* or *No Rules*, the inventory quantity export runs when scheduled for system *A*, and includes all product locations in systems *B* and *C* that have been updated since the last inventory quantity export for system *A*.
- If the *Safe Stock Method* is set to *Probability Rules:*
  - Whenever Order Broker receives the inventory count web service request, it responds with the requested number of updated product location records since the most recent request.
  - The inventory quantity export runs when scheduled for system *A*, and includes all product locations in systems *B* and *C* that have an available quantity greater than zero.
- The calculation of the quantities in the export file, and the web service response, when using probability rules, is based on the selected *Safe Stock Method*.

> **Note:**
>
> The Default Unfulfillable Location is not included in the inventory quantity export.

See below for more details.

Pausing inventory updates through RICS: If *Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)* are enabled, these updates need to pause during the inventory export process in order to prevent database contention. To support this requirement, if the Online flag at the *RICS Integration tab* on the **System** screen is selected:

- When the inventory quantity export begins, it first sends a `stop` request to RICS.
- Then when the export completes, it sends a `start` request to RICS.

The message is sent to the URL specified for the **Outbound Orders Service** at the *RICS Integration* tab on the **System** screen.

> **Note:**
>
> To support sending the `stop` and `start` requests, the User ID specified at the *RICS Integration* tab on the **System** screen needs to have the Operator or Admin role in RIB.

Maximum number of records exported? When the export is generated through the getInventoryQuantity request message, the export file includes up to the number of records specified for the `inventory.qty.export.max.threshold` in the

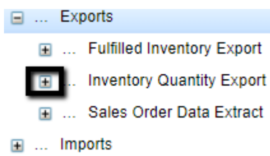
CTL_APP_CONFIG table. This threshold is set to 500 by default. See the Operations Guide for more information.

Export file placement: The export creates the export file in the FILE_STORAGE table. The CONTAINER setting for the record is OROB-EXPORT. You can use the File Storage API to download export file records from the FILE_STORAGE table.

Inventory Quantity Export History: Use the *Inventory Quantity Export History* screen to review inventory quantity exports that have run.

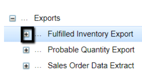
Scheduling the Inventory Export

- Click the plus sign next to the Inventory Export job in the left-hand panel to display a list of existing organizations.



> **Note:**
>
> The list of organizations is available only if Use Routing Engine is selected at the *Tenant-Admin* screen.

- Click the organization whose inventory quantity data should be exported. When you select an organization, the systems within the organization are displayed.



> **Note:**
>
> When the *Safe Stock Method* is set to *Probability Rules*, you cannot schedule the job to run more than once a day. With this setting, the system can instead receive incremental inventory updates through the Get Inventory Quantity web service, described in the Operations Guide.

- Use the *Days of Week* to select each day when the export job should run.
- Use the *Time* field to enter each time when the job should run, in 24-hour format (HH:MM). If entering multiple times, separate each with a comma and no spaces.

> **Important:**
>
> To avoid a system slow-down or degrading performance, do not run the Inventory Quantity Extract more than once a day or during peak processing time.

- When you select a system in the organization, the *Summary of Inventory Quantity Export Fields* are displayed to the right. See the *Inventory Quantity Rules Settings* for details on the *Safe Stock Method*, *File Output Type*, and *Incremental Updates* fields, and see *Inventory Quantity Rules Settings*, below, for details on configuration options.
- Optionally, select *Schedule Enabled*.
- Select *Save*.
- Select *Cancel* to exit the screen.

Inventory Quantity Rule Settings

Probability Rules Settings:

- *Overview:* Provides incremental updates to an external system through a web service, applying probability rules set up through the *Probability Rules* and *Probability Location* screens, as well as a pipe-delimited file containing a full overlay of all product locations where the available quantity is greater than zero.
- *Configuration:*
  - *Safe Stock Method*: Set to *Probability Rules*.
  - *File Output Type*: Set to *Full Overlay*, and cannot be changed.
  - *Incremental Updates*: Set to *Probability Rules* to enable a background process to perform the probability calculation and queue updated product location records to return in the response to the inventory quantity web service; otherwise, set to *No Update*.

Additional configuration requirements:

- Select the *Inventory Qty Export* flag at the *Inventory* tab of the **System** screen for each system that should have product locations included in the export.
- Set the *PQE Startup Threads* at the *Tenant-Admin* screen to a number from 1 to 100 to enable the background process that performs the probable quantity calculation.
- If needed, create the web service user ID to authenticate the incremental update web service for the Admin web service; see *Web Service User* for background.

For more information: See *Probability Rules Update and Incremental Quantity Web Service*. Also, see the *RESTful Get Inventory Quantity Updates* chapter in the Operations Guide for information on the web service that returns incremental inventory quantity updates.

Probable Quantity Rules Settings:

- *Overview:* Provides a pipe-delimited file that includes either totals aggregated by product or all changed records for individual product locations after applying probable location rules, set up through the *Probable Quantity Rules* and *Probable Quantity Location* screens.
- *Configuration:*
  - *Safe Stock Method*: Set to *Probable Quantity Rules*.
  - *File Output Type*: Set to either *Aggregate by Product* or *Changed Records*. See *Aggregate by Product* for a discussion.
  - *Incremental Updates*: Set to *No Update*, and cannot be changed.

For more information: See *Probable Quantity Update and Export*.

No Rules Settings:

- *Overview:* Provides a pipe-delimited file that includes either totals aggregated by product or all changed records for individual product locations after applying probable location rules.
- *Configuration:*
  - *Safe Stock Method*: Set to *No Rules*.
  - *File Output Type*: Set to either *Aggregate by Product* or *Changed Records*. See *Aggregate by Product* for a discussion.
  - *Incremental Updates*: Set to *No Update*, and cannot be changed. Only the pipe-delimited file is available.

For more information: See the *Inventory Quantity Export Using Available to Promise Quantity (No Rules)*.

Summary of Inventory Quantity Export Fields

- *Schedule Enabled*
- *Schedule Interval*: Set to *Day(s) of Week*. Display-only.
- *Time*
- *Safe Stock Method*
- *File Output Type*
- *Incremental Updates*

Job Summary

- *Last Updated*
- *Last Run*
- *Next Run*
- *Last Status*

For more information: See the *Tenant-Admin* screen for information on *Retention Settings* fields.

Probability Rules Update and Incremental Quantity Web Service

Required configuration: See *Inventory Quantity Rules Settings* for details on configuring the inventory quantity export for probability rules and to support the Get Inventory Quantity Updates web service to support incremental updates.

Difference between probable quantity rules and probability rules: Probable quantity rules are used to calculate the probable quantity to pass to an integrated system, such as an ecommerce site, while probability rules apply dynamically to determine the available quantity when Order Broker receives a request, such as a Submit Order request or a Locate Items request.

Tracking Probability Rules for Incremental Updates on Inventory Availability

The probability rule export uses a background process that evaluates changes that might affect the quantity that is expected to be available in product locations. This information is queued in the database so that Order Broker can send current information, including the new "probable quantity" based on probability rules, for updated product locations, when requested by an integrating system. This job runs if:

- Both the *Safe Stock Method* and the *Incremental Updates* are set to *Probability Rules*, and
- The *PQE Startup Threads* at the *Tenant-Admin* screen is set to any number from 1 to 100.

Note that the field returns in the web service is labeled as the probable quantity, but it is a projected inventory count based on probability rules, not on probable quantity rules.

Which systems? The background process evaluates product locations for all systems within the organization that have the *Inventory Qty Export* flag at the *Inventory* tab of the **System** screen selected.

Which updates trigger probability rule calculation? The background process monitors the following data that could be factors in applying probability rules, and calculates the updated quantity to return in the inventory quantity web service.

- *Product location updates:* Changes to the available quantity or reserved quantity based on status updates, minimum sell quantity, sales velocity, shrink rate, daily sell-through quantity, sell quantity/multiple, and the fulfilled quantity. See the *Browse Product Locations* window for information on these fields.
- *Product updates:* Changes to the category, class, or department, if a product location exists.
- *System product updates:* A change to the master style, if a product location exists.

Also, creating a new product location triggers the probability rule calculation.

Things to note:

- Probability rules based on express carrier, order type, originating system, last updated date, today, or requested quantity are not considered when performing the probability rule calculation.
- Probability rules based on the product location's next PO date or next PO quantity are not considered when performing the probability rule calculation for the web service update; however, they are applied to the data in the inventory quantity extract file, described below.
- Reserved quantity updates that take place through changing the statuses selected at the *Reservation tab* of the **System** screen do not trigger probability rule calculation for the web service update; however, these changes do factor into the calculation for the full overlay export file.
- If a probability rule set to Exclude Location applies, the probable quantity indicated for the product location in the web service update is zero, and the product location is not included in the extract file.
- The *Default Unfulfillable Location* and the *IN PROCESS location* are not included in the probability rule calculation.
- The *Use Probability Rules* preference does not need to be selected for the processing described here to take place.

Get Inventory Quantity Updates web service: Order Broker responds with recent inventory updates when it receives a request through the inventory quantity web service. The requesting system can specify the number of updated product locations to include in the response, and Order Broker tracks which updates have been sent in the web service, and which are queued for an upcoming web service request. See the *Get Inventory Quantity Updates* chapter in the Operations Guide for information on this web service.

Full Overlay Inventory Quantity Extract File

File name: The generated full overlay inventory quantity extract file generated through the *Probability Rules Update and Incremental Quantity Web Service* is named INVENTORY_QUANTITY_EXTRACT_SYSTEM_200220_123456.txt, where SYSTEM is the system code and 200220_123456 is the date and time. The text file is in a zip file of the same name, for example INVENTORY_QUANTITY_EXTRACT_SYSTEM_200220_123456.zip.

Which records included? This file includes all product locations for the organization that currently have an available quantity greater than zero. Also, only product locations associated with a system whose *Inventory Qty Export* flag is selected are included.

The *Use Probability Rules* preference does not need to be selected for this extract file to be generated.

File placement: When the export runs, the program creates the export record in the FILE_STORAGE table. The CONTAINER setting for the record is OROB-EXPORT. You can use the File Storage API to download export file records from the FILE_STORAGE table.

File contents: The pipe-delimited file contains the following fields, including a header row containing the column names:

- SYSTEM_CD: The code identifying the system associated with the product location.
- PRODUCT_CD: The system product code in the organization's default system.
- LOCATION_CD: The code identifying the location in the system.
- AVAILABLE_QTY: The current on-hand quantity for the product location, before applying any calculations.
- RESERVED_QTY: The reserved quantity for the product location, based on the statuses selected at the *Reservation tab* of the **System** screen, and updated through status updates to the order line.
- PROBABLE_QTY: The calculated value after applying any eligible probability rules.

> **Note:**
>
> - The PROBABLE_QTY value here is not the same as the probable quantity calculated using probable quantity rules, as described under *Probable Quantity Update and Export*.
> - Probability rules based on express carrier, order type, originating system, last updated date, today, or requested quantity are not considered when calculating the probable quantity.
> - If a probability rule is set to Exclude Location applies, the product location is not included in the extract file.
> - The *Default Unfulfillable Location* is not included in the probability rule calculation.
> - The *Use Probability Rules* preference does not need to be selected for the file to be generated as described here.

Job notifications: If the *Event Notifications* settings are configured at the *Event Logging* screen, a job notification message is generated each time the export job runs. See *Event Notifications* settings and the *Job Notification Messages* appendix of the Operations Guide for more information.

Probable Quantity Update and Export

Required configuration: See *Inventory Quantity Rules Settings* for details on configuring the inventory quantity export for probable quantity.

If the *File Output Type* is set to *Changed Records*, the probable quantity update and export:

- Subtracts the current reserved quantity for updated product locations.
- Subtracts the fulfilled quantity for product locations, populated if it has not been cleared by the *Fulfilled Inventory Export*.
- Updates the probable quantity field, if necessary, in the product location table in Order Broker, as well as the probable updated date. See *Probable Quantity*, below, for a discussion.
- Creates a pipe-delimited export file for all product locations in the organization whose probable quantities were updated since the last time the export ran for the system running the update and export, provided the *Inventory Qty Export* flag is selected at the *Inventory* tab of the **System** screen.

For more information: See *Probability Rules Update and Incremental Quantity Web Service* for information on exporting inventory quantities based on probability rules rather than based on probable quantity rules.

About probable quantity update and export:

- *Aggregate by Product*
- *Probable Quantity*
- *Evaluating Probable Quantity Rules*
- *Probable Quantity Export File Layout and Contents*

Aggregate by Product

If you have selected the probable quantity export and the *File Output Type* is set to *Aggregate by Product*, the update and export:

- Sums the quantities for each product across product locations, regardless of whether there has been any activity since the last export.
- Creates a pipe-delimited export file containing the products and totals. In this situation, the file does not include the location code.

No other uses of probable quantity: Order Broker does not use the probable quantity field in any calculation, return it in any web service, or display it on any screen. Its only use is to be available for in the probable quantity export.

Which product locations are included in the export file? If *File Output Type* is set to *Changed Records*, the export file includes product locations that:

- Are part of a system that has the *Inventory Qty Export* flag selected.
- Have been updated since the last time the export file was generated for the requesting system.

Job notifications: If the *Event Notifications* settings are configured at the *Event Logging* screen, a job notification message is generated each time the export job runs. See *Event Notifications* settings and the *Job Notification Messages* appendix of the Operations Guide for more information.

Probable Quantity

Usage: If the *Safe Stock Method* field is set to *Probable Quantity Rules*, the probable quantity export program updates the probable_qty and the probable_updated fields in the product location table. The probable_qty is not used in any additional process or displayed on any screen in Order Broker; however, it is included in the probable quantity export so that a remote system, such as your ecommerce system, can display a more accurate picture of an item's availability, without the need for interactive inquiries.

However, if the *Safe Stock Method* field is set to *No Rules*, the system uses the *available to promise quantity* as the probable quantity.

Which product locations evaluated? If the *Safe Stock Method* field is set to *Probable Quantity Rules*, when the inventory quantity export program runs for a system, it evaluates, and potentially updates, the probable_qty for all product locations that are flagged as eligible to be included in the export file (based on a probable_updated field set to NULL). The product location is flagged as eligible by setting this field set to NULL when:

- A product import, including the incremental inventory import, updates the product location.
- You update a product location at the *Edit Product Location* screen.
- The product location is updated through an interactive inventory update (for example, triggered by a submit order request or a locate items search).
- You assign a probable quantity rule, modify an assigned probable quantity rule, or delete a probable quantity rule assignment for the location type that includes the location through the *Probable Quantity Location* screen, even if the product does not qualify for that particular rule.

When the probable quantity export program evaluates and resets the probable_qty based on whether the *Safe Stock Method* flag is selected, it updates the probable_updated field with the current date and time, indicating that the product location is not currently eligible for probable quantity update until the next activity that updates the probable_updated field.

Backorders? For the purposes of calculating the probable quantity for export, a negative available quantity is treated the same way as an available quantity of zero.

Calculation details: To determine the probable_qty for a product location, the program uses the following rules:

1. The calculation starts with the current on-hand quantity (the available_qty in the product_location table).
2. The update calculates the available to promise quantity by:
   - Subtracting the reserved quantity, if any, based on the Reserved Statuses at the *Reservation tab* at the *System* screen.
   - Subtracting the fulfilled quantity, if any, for recently fulfilled orders in the store location that have not been reset to 0 through the *Fulfilled Inventory Export*.
3. If:

- The *Safe Stock Method* field is set to *No Rules*, or if no probable quantity rules apply to the product location based on the location type, the probable_qty = the available to promise .
- Otherwise, if the *Safe Stock Method* field is set to *Probable Quantity Rules*, and there are any probable quantity rules that apply to the product location based on the location type, then the probable_qty is calculated by applying the probable quantity rule to the available to promise quantity.

About probable quantity rules: Probable quantity rules can add or subtract a quantity, increase or decrease by a percentage, or set the probable_qty to a specified quantity.

Examples:

If the available to promise quantity (Available quantity - reserved quantity) = 10 and...

- Probable quantity rule is Available + 5, then the probable_qty is 15.
- Probable quantity rule is Available - 15, then probable_qty is 0.
- Probable quantity rule is 5, then probable_qty is 5.
- Probable quantity rule is Available - 10%, then probable_qty is 9.

If the available to promise quantity is negative: The program still applies the probable quantity rule if the available to promise quantity is negative. For example, if the available to promise quantity is -3, but the probable quantity rule indicates to add 10, then the probable_qty is 7. However, if the result after applying the probable quantity rule is still negative, then the probable_qty is 0.

Probable quantity rules that apply a percentage increase or decrease do not affect the probable_qty if the available to promise quantity is less than 0. The result is still negative, so the probable_qty is still 0. For example, if the available to promise quantity is -5, and the rule increases the quantity by 25%, the result is still less than 0, so the probable quantity is 0.

Evaluating Probable Quantity Rules

You can set up probable quantity rules based on:

- matching system product code, or
- matching master style code
- matching department, class, or category
- no required matching

Also, you can assign probable quantity rules at the location type level or at the location level.

If multiple probable quantity rules could apply to the same product location, the program applies only the *last possible rule* as follows to calculate the probable_qty:

First, evaluate rules assigned to the location type:

- 1: no matching required
- 5: matching master style
- 6: matching system product

Next, evaluate rules assigned to the location, using the same sequence listed above; however, rules assigned at the location level might not apply if there was no additional activity, such as a product import, that flagged the product location as eligible for probable quantity calculation.

Example: For a particular product, rules have been assigned to:

- the location type, specifying a matching master style
- the location, without any matching required
- the location, specifying a matching system product

Result: The rule that is assigned at the location level and specifies a matching system product is applied to the product location and updates the probable_qty.

> **Important:**
>
> Rules assigned at the location level are eligible to be applied only if another activity, such as an inventory import, updates the product location.

For accurate calculation of the probable_qty, do not apply multiple probable quantity rules at the same level and with the same criteria.

Date and time updated: When it updates the probable_qty, the program also updates the probable_updated date and time in the product location table. This update occurs regardless of whether the probable_qty was updated solely because of a change in probability rule assignment.

What if the probable_qty doesn't change? If the probable_qty does not change as a result of the probable quantity update program, the program does not update the probable_updated field unless the probable_updated field was set to NULL because of one of the activities listed above.

Example: If a user advances to the **Edit Product Location** screen in Order Broker and then clicks *Save*, this changes the probable_qty and probable_updated date for the product location to NULL; as a result, the update program includes this product location in its updates, and the product location is then eligible to be included in the extract file, even if there has not been any actual inventory change or change to the resulting probable_qty.

> **Note:**
>
> Even if the probable_qty for a product location is more than zero, this does not indicate if the location supports a particular transaction type, such as pickup.

Probable Quantity Export File Layout and Contents

File placement: When the probable quantity export runs, the program creates the export record in the FILE_STORAGE table. The CONTAINER setting for the record is OROB-EXPORT. You can use the File Storage API to download export file records from the FILE_STORAGE table.

File naming: The file name is `Probable_Quantity_Extract_SYS_220702_123456.txt`, where `SYS` is the system (in all uppercase) running the export, and `150702` is the date when the file was generated, in YYMMDD format, and `123456` is the time when the file was generated, in HHMMSS format, and in the retailer's time.

File contents:

- SYSTEM_CD: The code identifying the system associated with the product.
- PRODUCT_CD: The system product code for the item in the system generating the extract. The process trims any blank, trailing spaces.
- LOCATION_CD: The code identifying the location. This field is not included when the Aggregate by Product flag is selected. In this case, the following quantities are totals across all eligible product locations, and all products are included in the export file regardless of whether there has been any activity since the last export.
- AVAILABLE_QTY: The current on-hand quantity of the product, without factoring in any reserved quantity or rules. From the available_qty in the product_location table, or the total available quantity across all product locations if the Aggregate by Product flag is selected.
- RESERVED_QTY: The current quantity reserved for the product, based on the selected *Reserved Statuses* for the system. From the reserved_amt in the product_location table, or the total reserved quantity across all product locations if the Aggregate by Product flag is selected.
- PROBABLE_QTY: See *Probable Quantity*.

Inventory Quantity Export Using Available to Promise Quantity (No Rules)

Required configuration: See *Inventory Quantity Rules Settings* for details on configuring the inventory quantity export to include the *available to promise quantity* when the *Safe Stock Method* is set to *No Rules*.

Aggregate by product: If the *Safe Stock Method* is set to *No Rules* and the *File Output Type* is set to *Aggregate by Product*, the export:

- Sums the quantities for each product across product locations, regardless of whether there has been any activity since the last export.
- Creates a pipe-delimited export file containing the products and totals for all products that are part of a system that has the *Inventory Qty Export* flag selected. In this situation, the file does not include the location code.

Changed records: If the *Safe Stock Method* is set to *No Rules* and the *File Output Type* is set to *Changed Records*, the export file includes product locations that:

- Are part of a system that has the *Inventory Qty Export* flag selected.
- Have been updated since the last time the export file was generated for the requesting system.

File layout: The same as the *Probable Quantity Export File Layout and Contents*, except that the PROBABLE_QTY is set to the *available to promise quantity*.

File placement: When the export runs, the program creates the export record in the FILE_STORAGE table. The CONTAINER setting for the record is OROB-EXPORT. You can use the File Storage API to download export file records from the FILE_STORAGE table.

Job notifications: If the *Event Notifications* settings are configured at the *Event Logging* screen, a job notification message is generated each time the export job runs. See *Event Notifications* settings and the *Job Notification Messages* appendix of the Operations Guide for more information.

Sales Order Data Extract

You can use the sales order data extract to export data related to sales orders and purchase orders. The data that you can extract includes:

- sold-to and ship-to customers
- customization details
- items ordered
- status history

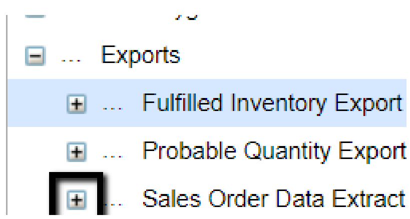
The extract writes the information to pipe-delimited files, which are bundled into a compressed zip file. See *File Storage API for Imports and Exports* for more information on obtaining export files, and see *Sales Order Data Extract Files* for information on the naming and contents of these files.

Extract by organization: You need to schedule this job separately for each organization whose order data should be extracted. Click the plus sign next to the job name in the left-hand panel to display a list of existing organizations.

> **Note:**
>
> The list of organizations is available only if Use Routing Engine is selected at the *Tenant-Admin* screen.

Scheduling the Sales Order Data Extract

- Click the plus sign next to the Sales Order Data Extract job in the left-hand panel to display a list of existing organizations.



- Click the organization whose sales data should be extracted. When you select an organization, the *Sales Order Data Extract Fields* are displayed to the right.

  > **Note:**
  >
  > The list of organizations is available only if Use Routing Engine is selected at the *Tenant-Admin* screen.

- Use the Schedule Interval field to select:
  – *Day(s) of Week* to have the extract run at a regular time on one or more days of the week to periodically extract all orders with any activity since the last extract, or,
  – *Initial Load* to extract:

        * All order data, if you do not specify an Extract Orders with Activity From and Activity To date, or
        * Data for orders that have had activity during the Activity From and Activity To dates.

> **Note:**
>
> The job fails if the total number of orders to extract exceeds 500,000. If this occurs, you can use the *Initial Load* option with the Activity From and Activity To dates to complete the extract of historical orders in increments until the extract is up to date. For example, if there is a total of 750,000 orders from the past year, you might use the *Initial Load* option with the Activity From and Activity To dates to break the extract into two six-month increments, each for less than the 500,000-order limit.

- If you selected a Schedule interval of *Day(s) of the Week*, select one or more *Days of Week* when the job should run.
- Enter the *Time* when the job should run.
- If you selected *Initial Load* as the *Schedule Interval*, optionally enter the Extract Orders with Activity From and To, as described above.
- Optionally, select Run Now to run the job immediately.
- Optionally, select Include Private Data to have the extract files include personal data, such as name, address, and email address; otherwise, leave this flag unselected to have personal data for customers replaced with asterisks or with text such as `***** Data Privacy Blocked *****`.

> **Note:**
>
> User names are not replaced in the extract files, regardless of the setting of the Include Private Data flag.

- Optionally, select *Schedule Enabled*.
- Select *Save*.
- Select *Cancel* to exit the screen.

Optionally, select Run Now to run the job immediately.

Sales Order Data Extract Fields

- Organization: The code and name of the organization selected in the left-hand panel. Display-only.
- Schedule Interval:
  - *Day(s) of Week* to have the extract run at a regular time on one or more days of the week to periodically extract all orders with any activity since the last extract, or,
  - *Initial Load* to extract:
    * All order data, if you do not specify an Activity From and Activity To date, or

    * Data for orders that have had activity during the Activity From and Activity To dates.

      See *Scheduling the Sales Order Data Extract*, above, for a discussion.

      > **Note:**
      >
      > **Also updated by Run Job API:** The setting of this field is updated when the *Run Job API* is used to submit this job.

- Day(s) of Week: Use these fields to select one or more Day(s) of Week when the job should run.
- Time: The time of day, in HH:MM format (24-hour clock) when the job runs. Required, regardless of the selected *Schedule Interval*.
- Extract Orders with Activity From and To: Optionally, enter a From and To date to include order data for orders with activity during this date range. These fields are enterable only when the Schedule Interval is set to *Initial Load*.

  > **Note:**
  >
  > **Also updated by Run Job API:** The settings of these fields are updated when the *Run Job API* is used to submit this job.

- Include Private Data: Select this flag to include personal data, such as names, addresses, and email addresses in the data extract files; otherwise, leave this flag unselected to have this information anonymized. See *anonymized* in the glossary for more information.

  > **Note:**
  >
  > **Also updated by Run Job API:** The setting of this field is updated when the *Run Job API* is used to submit this job.

- Run Now enables you to run the job immediately.

Job Summary

- *Last Updated*
- *Last Run*
- *Next Run*

Sales Order Data Extract Job History: Use the *Sales Order Data Extract Job History* screen to review sales order data extracts that have run.

For more information: See *Sales Order Data Extract Files* for information on the content of the extract files.

Identity Cloud User Synchronization

About identity cloud service user synchronization: Use IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) to create users for omnichannel applications, including Order Broker and Order Management System. Users that exist in IDCS or OCI IAM are then created in Order Broker:

- Through the Identity Cloud User Synchronization job, or
- Automatically, when the user logs into Order Broker.

Users are created in Order Broker with the default authority defined from IDCS or OCI IAM, described below.

If you need to create Store Associate users and/or Vendor users in addition to Order Broker users, see the processes described below.

> **Note:**
>
> 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. Use the related screen in Order Broker to update users once they have been created.

Web service authentication: The Identity Cloud User Synchronization job does not create web service users. See *Web Service Authorization* on creating web service users.

Required Setup for Identity Cloud Service User Synchronization

> **Note:**
>
> Begin the user synchronization process after setting up other required data in Order Broker, including your organization, preferences, systems, and roles. See *Setting Up Data for the Routing Engine Module* for more information.

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

Setup at the Tenant (admin) screen: Complete the *Identity Cloud Service Settings* at the Tenant screen. See these settings for more information.

Configuring 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; instead, it serves as a template for creating actual users. You cannot delete 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:

- Role assignments with a Role Type of *Retailer*, controlling the default authority to Order Broker screens. See *Role Wizard* for more information.
- The *Default Shipping System* that controls system product code to display as the *Item #* at the *Order* screen.

You can modify the configuration of the `default` user if you will import multiple groups of users into Order Broker. 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.

Setup and Creation of Order Broker Users in IDCS or OCI IAM

You can use the following process in IDCS or OCI IAM to create users and control their attributes through group assignment, using the application record in IDCS or OCI IAM for Order Broker, The application record typically has a Name such as RGBU_OBCS_UAT_APPID.

- 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 or OCI IAM: either OBCS_Admin or OBCS_User.
- Create each user in IDCS or OCI IAM, specifying the user's first name, last name, user name, and email address. The user name be lower case and cannot be longer than 256 positions.
- Assign each created user to the appropriate group.
- Assign each group to the Order Broker application in IDCS or OCI IAM.
- Assign each user to the appropriate application role in IDCS or OCI IAM.
- Assign or reset the password for each user in IDCS or OCI IAM. This triggers an email to the email address specified for the user, who can log in using either the user name defined in IDCS or OCI IAM if it does not exceed 10 positions, or the email address.

> **Note:**
>
> If the user logs in after configuration in IDCS or OCI IAM, this creates the user record in Order Broker; otherwise, the record is created through the import job, described below.

After completing the required setup describe above, run the Identity Cloud User Synchronization job to import new users from IDCS or OCI IAM. Each new user is created in Order Broker with the settings from IDCS or OCI IAM:

- The admin flag is selected if the user is assigned to the OBCS_Admin application role in IDCS or OCI IAM.
- 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. You can also delete the users from Order Broker, although this does not delete the corresponding records in IDCS or OCI IAM.

> **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 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 or OCI IAM corresponding to each vendor created in Order Broker and then send a request to assign the OBCS_Vendor_User role. 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, and then the group is assigned to the role.

  > **Note:**
  >
  > In the case of a failure, you may need to assign the group to the role manually.

- In IDCS or OCI IAM, create each vendor user and assign it to the vendor user group associated with the same vendor. See *Setup and Creation of Order Broker Users in IDCS or OCI IAM* for background on creating the user in IDCS or OCI IAM 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 or OCI IAM. 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 for more information.
- In Order Broker, run the Identity Cloud User Synchronization job to create store user groups in IDCS or OCI IAM 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. Order Broker then sends a request to add each Store Connect group to the OBCS_Store_User role in IDCS or OCI IAM.

> **Note:**
>
> In the case of a failure, you may need to assign the group to the role manually.

- In IDCS or OCI IAM, create each store associate user and assign it to the store user group associated with the appropriate system. See *Setup and Creation of Order Broker Users in IDCS or OCI IAM* for background on creating the user in IDCS or OCI IAM 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 or OCI IAM.
- 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.
> - An associate user ID that exceeds 30 positions in length can cause display issues in Store Connect.

Scheduling the Identity Cloud User Synchronization Job

- Enter the Time in HH:MM format (24-hour clock) when the job should run.
- Select *Schedule Enabled*.
- Optionally, select *Run Now* to run the job immediately.
- Select *Save*.
- Select *Cancel* to exit the screen.

Synchronization job history: Use the *Identity Cloud User Synchronization History* screen to review history of the synchronization job.

Identity Cloud User Synchronization Fields

- *Schedule Enabled*
- Schedule Interval: Set to *Daily*. Display-only.
- *Time*: The time of day, in HH:MM format (24-hour clock) when the job runs. Required.
- Run Now
- *Last Updated*
- *Last Run*
- *Next Run*

Incremental Inventory Import

Overview: The incremental inventory update checks for an incremental inventory record in the FILE_STORAGE table.

Identifying the incremental inventory file: The file in the FILE_STORAGE table needs to be named `INCREMENTAL_INVENTORY_SYS_xxx.TXT`, where `SYS` is the system code and `xxx` is a user-defined alphanumeric sequence number. The sequence number indicates to the program the order in which to process multiple import files for the system. For example, if the files are named `INCREMENTAL_INVENTORY_ABC_AB1.TXT` and `INCREMENTAL_INVENTORY_ABC_AB.TXT`, the program first processes the file with the `AB1` sequence number, and then the file with the `AB2` sequence number. If there are records for the same product location in both import files, the record from the second file overwrites the first.

You cannot submit an import if another import process, including the product import, is already running in your organization.

Job Batch Size: The *Job Batch Size* controls the number of records to process in each batch.

- The program creates or updates the product location records in the Order Broker database.
- If there are any errors that prevent the program from processing a record in one of the files, the program creates an error record in the FILE_STORAGE table. The CONTAINER setting for the record is OROB-ERRORS. You can use the File Storage API to download export file records from the FILE_STORAGE table.

  Errors that might occur include an invalid number of columns, alphabetical characters in a numeric field, or a numeric field that is null: for example, the next PO quantity is blank rather than 0 or another number.
- If the Incremental Inventory Import field at the **Event Logging** screen is set to *Administrator*, the program sends the *Incremental Inventory Import Status Email* to your system administrator (the Administrative Email addresses) if the incremental inventory update fails.

Records imported regardless of system: The incremental inventory update program processes all records in the pipe-delimited file or FILE_STORAGE record if they are product locations for the organization, regardless of whether they are associated with the system selected for import; however, if they are not associated with the organization, they are skipped and are not reported as errors.

Resolving a scheduling issue: If the import does not run as scheduled, you can use the *Reschedule All* option at the *View Active Schedules* screen to stop and restart the schedules for all jobs and periodic programs.

Note that the *Reschedule All* option does not restart jobs that are in Paused status (⊘). Jobs stay in Paused status only briefly before Order Broker restarts them automatically.

Incremental Imports History: Use the *Incremental Imports History* screen to review incremental imports that have run.

Job notifications: If the *Event Notifications* settings are configured at the *Event Logging* screen, a job notification message is generated each time the import job runs.

See *Event Notifications* settings and the *Job Notification Messages* appendix of the Operations Guide for more information.

Sample Incremental Inventory Import File

The pipe-delimited incremental inventory import file needs to include the following fields. The first row is the header information, which is informational only, and the following row is the product location data to update.

```
SYSTEM_CD|LOCATION_CD|PRODUCT_CD|AVAILABLE_QTY|NEXT_PO_QTY|
NEXT_PO_DATE
```

```
6|1|PEN123|100|123|2022-08-27
```

Incremental Inventory File Mapping

- *system_cd:* The code identifying the system importing the updated inventory for the product locations into Order Broker. Alphanumeric, 10 positions. Required.
- *location_cd:* The code identifying the location where the product is stocked in the external system. Alphanumeric, 10 positions. Required.
- *product_cd:* The system product code identifying the product in the external system. The system product code might differ from the product code if the external system is not the default system for the organization. Alphanumeric, 35 positions. Required.
- *available_qty:* The current quantity of the product available to sell in this location as of the time of the import process. A negative quantity, preceded by a minus sign (-), indicates that the item is backordered. Numeric, 6 positions. Required, but can be set to 0.
- *next_po_qty:* The quantity ordered for this product on the next purchase order for this location. Numeric, 6 positions. Required, but can be set to 0.
- *next_po_date:* The next date when a purchase order for this product is expected for delivery in this location. Datetime format; if set to YYYY-MM-DD, a time of 12:00:00 AM is appended. Can be empty, even if there is a next_po_qty.

Incremental Inventory Import Status Email

Order Broker sends this email to the Administrative Email address specified at the *Event Logging* screen if the incremental inventory program was unable to import the pipe-delimited file and if the Email Notifications flag for the *Incremental Inventory Import* option is set to *Administrator*.

The language used for the email is based on the Language specified for the organization, and the formatting of dates, times, and numbers is also based on the organization-level settings. See the *Organization* screen for more information.

The `Uploaded By` entry always indicates a user of `SYSTEM`.

****ATTENTION****

Your Incremental Inventory Import has failed.

System Code 6

Date/Time File Failed 2016-11-02 13:01:06.257

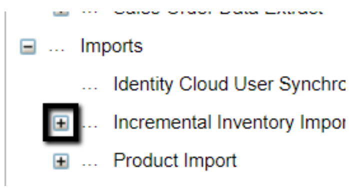
Uploaded By SYSTEM

Please do not respond to this message.

--Order Broker

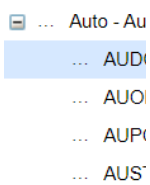
Scheduling the Incremental Inventory Import Job

- Click the plus sign next to the Incremental Inventory Import job in the left-hand panel to display a list of existing organizations.



> **Note:**
>
> The list of organizations is available only if Use Routing Engine is selected at the *Tenant-Admin* screen.

- Click the organization where incremental inventory data should be imported. When you select an organization, the systems within the organization are displayed.



- When you select a system, the *Incremental Inventory Import Fields* are displayed to the right.
- Enter the Time in HH:MM format (24-hour clock) when the job should run.
- Optionally, select *Schedule Enabled*.
- Optionally, select Run Now to run the job immediately.
- Select *Save*.
- Select *Cancel* to exit the screen.

Incremental Inventory Import Fields

- *Schedule Enabled*
- Schedule Interval: Set to *Daily*. Display-only.
- Time: The time of day, in HH:MM format (24-hour clock) when the job runs. Required.

Job Summary

- *Schedule Enabled*
- Run Now
- *Last Run*
- *Next Run*

For more information: See the *Tenant-Admin* screen for information on *Retention Settings* fields.

Product Import

Process overview: See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for an overview.

Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services imports: Importing store and warehouse locations, products, inventory, barcodes, and product images from *OCDS or Merchandising Omni Services* also uses a different process from the one described under *Import Process Overview (Other than RMFCS File Upload through OCDS or Merchandising Omni Services)*. If you have configured the *OCDS Integration tab* of the **System** screen to enable any of the available imports from OCDS or Merchandising Omni Services, then submitting an import at the **Schedule Jobs** screen triggers the request(s) to OCDS or Merchandising Omni Services for data, rather than any of the other import options described here. Also, the fields described under *OCDS or Merchandising Omni Services Integration* are used to control the import from OCDS or Merchandising Omni Services. See *OCDS or Merchandising Omni Services Imports* for background and more information.

Import products from the default system first to prevent import errors: It is important to schedule the product import for the *default system* before the other systems in the organization. Order Broker requires that the product exist in the default system before you can create the system products or product locations for the other systems. However, if you import products from Merchandising Cloud Services applications (RMFCS), each product has the same product and system product code across systems, and the product code is created automatically if it does not already exist in the default system.

> **Important:**
>
> Oracle recommends that you run this job daily at a time when demands on the system are limited, and when it does not interfere with the database backup.

Additional consideration when scheduling import processes for systems:

- Oracle recommends that you allow about 30 minutes between scheduled import processes to help make sure that each process completes before the next one begins.
- If you are using File Storage, a copy of each import file must be uploaded to the OROB-IMPORTS container of the FILE_STORAGE table through a putFile request message.

> **Note:**
>
> Each import is optional. For example, you can run the import for products and product locations without also importing locations, UPC barcodes, or images. When the import runs, it includes any import files it finds for the system in the OROB-IMPORTS container.

File cleanup: Product import error files are cleared by the Daily Clean Up job; see *Daily Clean Up* for more information. Product Import history is retained for the number of days specified in the *Job History* retention setting at the *Tenant-Admin* screen.

For more information: See:

- *Process overview: Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for background on the import process, including *File Storage API for Imports and Exports*.
- *Imports through OCDS or Merchandising Omni Services: OCDS or Merchandising Omni Services Imports*.
- *Additional supported imports:*
  - *Location imports: Importing Locations through File Storage API* and *Location Import Errors Report*.
  - *Product, system product, and image URL imports: Importing Products, System Products, and Item URLs through File Storage API* and *Product Import Errors Report*.
  - *Product location imports: Importing Product Locations through File Storage API*.
  - *Product UPC barcode imports: Importing UPC Barcodes through File Storage API* and *Product Barcode Import Errors Report*.

Product Import Status Email

When the import process is complete, Order Broker sends an email to the email address(es) specified at the *Administrative email* field at the *Event Logging* screen if the Email Notifications flag for the *Location Product Import* option is set to *Administrator*.

The language used for the email is based on the Language specified for the organization, and the formatting of dates, times, and numbers is also based on the organization-level settings. See the *Organizations* screen for more information.

Sample email contents:

ATTENTION*

Your Product Import Process has Failed.

System Code store

Import ID 201

Date/Time File Finished

2020-10-22 09:37:53.762

Uploaded By sample user

# of Product Records 850

# of Product Records In Error 12

# of Inventory Records 1,445

# of Inventory Records In Error 14

# of Location Records 1,300

# of Location Records In Error 14

# of Upc Records 0

# of Upc Records in Error 0

Please do not respond to this message.

--Order Broker

Information in this email includes:

- **Success or failure:** The email indicates that the process failed if any product, product location, location, or UPC records failed to update; otherwise, it indicates a success.
- **System code:** the *system* scheduled for import, or the selected system when you ran the import on demand.
- **Import ID:** A unique ID number assigned by Order Broker to identify an import process. This number is displayed at the *Product Imports History* screen and listed on the *Location Import Errors Report*, *Product Import Errors Report*, and *Product Barcode Import Errors Report*.
- **Uploaded By:** the user ID of the person who scheduled the import process, or ran it on demand.
- **# of Product Records:** The total number of product records that were successfully created or updated as a result of the import process.
- **# of Product Records in Error:** The total number of product import records that were in error for this import process.
- **# of Product Location Records:** The total number of product location records that were successfully created or updated as a result of this import process.
- **# of Product Location Records in Error:** The total number of product location import records that were in error for this import process.
- **# of Location Records:** The total number of location records that were successfully created or updated as a result of this import process.
- **# of Location Records in Error:** The total number of location import records that were in error for this import process.
- **# of Upc Records:** The total number of product UPC barcodes that were successfully created or updated as a result of this import process.
- **# of Upc Records In Error:** The total number of UPC barcodes that were in error for this import process.

Always generated? If the Email Notifications flag for the *Location Product Import* option at the *Event Logging* screen is set to *Administrator*, Order Broker generates this email regardless of whether the import process ran because you scheduled it, or you ran it on demand.

Negative number? A negative number of records generally indicates that an error occurred.

If number of records and number of records in error are both 0: The email lists a number of records and a number of records in error as 0 if there was no import file to process. This situation might occur if:

- You did not import a particular type of record; for example, there were no product barcodes to import; or
- The name of an import file did not match the naming convention; for example, a product barcode file was named `PRODUCT_BARCODE.TXT` (no system specified) or `PRODUCT_BARCODE_SYS.txt` (the txt extension was lowercase).

In any of these cases, the email indicates that the import was successful.

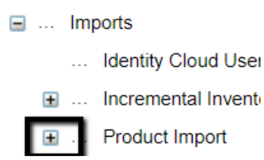
For more information: See the *Product Imports History* screen and the *Location Import Errors Report*, *Product Import Errors Report*, and *Product Barcode Import Errors Report* for more troubleshooting information related to these imports.

> **Note:**
>
> Some errors that can occur from the data in a flat import file are not written to the related import database table, so in that case the error is noted only in the error file and not on the related report; for example: an invalid number of columns in the flat file or an empty file.

Scheduling the Product Import Job

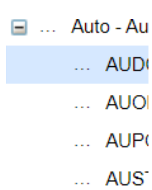
First, advance to Product Import options

- Click the plus sign next to the Product Import job in the left-hand panel to display a list of existing organizations.



> **Note:**
>
> The list of organizations is available only if Use Routing Engine is selected at the *Tenant-Admin* screen.

- Click the organization where data should be imported. When you select an organization, the systems within the organization are displayed.



- When you select a system, the *Scheduling the Product Import Job* are displayed to the right.

Then schedule the import for an integrated system

- When you select an organization, the *Scheduling the Product Import Job* are displayed to the right.
- Select one or more *Days of Week* when the job should run.
- Use the *Time* field to enter the time when the job should run, in 24-hour format (HH:MM). Entry of more than one time is not supported.
- Optionally, change the *Days to Keep Errors* to any number from 1 to 99.

- If you are running the *OCDS or Merchandising Omni Services Imports*, complete the additional *OCDS Options* if *OCDS Configured* is set to Yes.
- Select *Schedule Enabled*.
- Optionally, select *Run Now* to run the job immediately.
- Select *Save*.
- Select *Cancel* to exit the screen.

Reviewing results: You can review the import process at the *Product Imports History* screen, and you can review errors through the *Product Barcode Import Errors Report*, *Product Import Errors Report*, and *Location Import Errors Report*.

Product Import Job Fields

- *Schedule Enabled*
- *Run Now*
- *Schedule Interval*: Set to *Day(s) of Week*. Display-only.
- *Days of Week*
- *Time*: The time of day, in HH:MM format (24-hour clock) when the job runs. Required.
- *Days to Keep Errors*

OCDS Options (If OCDS is configured):

- *Schedule Interval Options*
- *Date (in OCDS Options)*
- *Time*

Job Summary

- *Last Updated*
- *Last Run*
- *Next Run*

For more information: See the *Tenant-Admin* screen for information on *Retention Settings* fields.

Auto Cancel Unclaimed Pickup Orders

This job cancels unclaimed pickup or ship-for-pickup orders based on the settings of the *Auto Cancel Days of Unclaimed Pickup Orders* and *Auto Cancel Days of Unclaimed Ship For Pickup Orders* at the **Preferences** screen. This job uses a Schedule Interval of *Daily*, and runs at the specified Time.

Scheduling the Auto Cancel Unclaimed Pickup Orders Job

- Enter the Time in HH:MM format (24-hour clock) when the job should run.
- Optionally, select *Schedule Enabled*.
- Optionally, select Run Now to run the job immediately.
- Select *Save*.
- Select *Cancel* to exit the screen.

Auto Cancel Unclaimed Pickup Order Fields

- *Schedule Enabled*
- Schedule Interval: Set to *Daily*. Display-only.
- Time: The time of day, in HH:MM format (24-hour clock) when the job runs. Required.
- *Last Updated*
- *Last Run*
- *Next Run*
- Run Now

Auto Cancel Unclaimed Pickup Orders History: Use the *Auto Cancel Unclaimed Pickup Orders History* screen to review auto-cancel jobs that have run.

For more information: See *Auto-Cancel Unclaimed Orders* for a discussion.

Email Notifications

This job generates email notifications to store locations, vendors, customers, retailers, or systems operations staff based on the unprocessed records that are currently in the EMAIL_NOTIFICATION table.

Scheduling the Email Notifications Job

- Use the Minutes field to enter the number of minutes to wait before generating any emails to store locations, vendors, customers, retailers, or systems operations staff. Your entry must be a number from 1 to 59.
- Optionally, select *Schedule Enabled*.
- Optionally, select Run Now to run the job immediately.
- Select *Save*.
- Select *Cancel* to exit the screen.

Email Notifications Fields

- *Schedule Enabled*
- Schedule Interval: Set to *Minutes*. Display-only.
- *Last Updated*
- *Last Run*
- *Next Run*
- Run Now

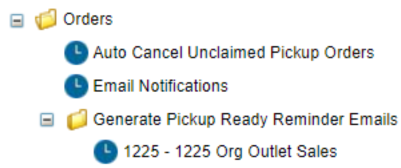
History: Use the *Email Notifications Job History* screen to review email notifications jobs that have run.

Generate Pickup Ready Reminder Emails

You can use the generate pickup ready reminder emails job to send emails to customers indicating that their pickup orders or ship-for-pickup orders are ready for pickup, based on whether the date and time when they were picked or received is older than the number of *Aged Hours* defined for the job.

The email will be generated to the customer each time the job runs until the order is picked up or canceled. Emails are not generated for orders that are under review, or that are not assigned to a Store Connect location.

Generate by organization: You need to schedule this job separately for each organization that needs to generate pickup-ready reminder emails. Click the plus sign next to the job name in the left-hand panel to display a list of existing organizations.



> **Note:**
>
> The list of organizations is available only if Use Routing Engine is selected at the *Tenant-Admin* screen. Also, only organizations that have a Store Connect system defined are displayed.

Scheduling the Generate Pickup Ready Reminder Emails Job

- Click the plus sign next to the Generate Pickup Ready Reminder Emails job in the left-hand panel to display a list of existing organizations.
- Click the organization where you want to generate the reminder emails. When you select an organization, the *Generate Pickup Ready Reminder Email Fields* are displayed to the right.

  > **Note:**
  >
  > The list of organizations is available only if Use Routing Engine is selected at the *Tenant-Admin* screen.

- Optionally, select *Schedule Enabled*.
- Optionally, select Run Now to run the job immediately.
- Select each *Day of Week* when the job should run.
- Select the *Time* when the job should run.
- Specify the *Aged Hours* to indicate how many hours after a pickup order is picked, or a ship-for-pickup order is picked (if the sourcing location is the same as the pickup location) or received (if the sourcing location ships the items to the pickup location), that it is eligible to receive the pickup reminder.
- Select *Save*.
- Select *Cancel* to exit the screen.

Generate Pickup Ready Reminder Email Fields

- *Schedule Enabled*

- Run Now
- *Schedule Interval:* Set to Day(s) of Week. Display-only.
- *Day of Week*
- *Time*
- *Aged Hours*

Job Summary

- *Last Updated*
- *Last Run*
- *Next Run*

Generate Pickup Ready Reminder Emails Job History: Use the *Generate Pickup Reminder Email History* screen to review pickup ready reminder generation jobs that have run.

For more information: See the *Store Connect Overview* for background.

Fields at this Screen

Field	Description
Organization	The *organization* associated with data imported or exported by the job. Used only for *Fulfilled Inventory Export*, *Inventory Quantity Export*, *Sales Order Data Extract*, *Incremental Inventory Import*, and *Product Import*. You can schedule these jobs for multiple organizations.
System	The *system* associated with the data imported and exported by the job. Used only for the *Fulfilled Inventory Export*, *Inventory Quantity Export*, *Incremental Inventory Import*, and *Product Import*. You can schedule these jobs for multiple systems.
Schedule Enabled	If this flag is selected, the job runs according to the defined schedule. Only jobs whose schedules are enabled are listed at the *View Active Schedules* screen.

Field	Description
Schedule Interval	Indicates the time period used to determine when the job should run. With the exception of the Sales Order Data Extract, the type of schedule interval is display-only and cannot be changed. Possible intervals are: • *Daily:* Run once a day at a specified time. Used for *Daily Clean Up Identity Cloud User Synchronization*, and *Auto Cancel Unclaimed Pickup Orders*. • *Day(s) of Week:* The job runs once a day for one or more days of the week. Used for *Fulfilled Inventory Export*, *Inventory Quantity Export*, *Sales Order Data Extract*, *Incremental Inventory Import*, and *Product Import*. • *Initial Load:* For the *Sales Order Data Extract*, indicates to load: – All order data, if you do not specify an Activity From and Activity To date, or – Data for orders that have had activity during the Activity From and Activity To dates. Not used for any other jobs. • *Minutes:* Run repeatedly at the defined number of minutes. Used by *Email Notifications*. • *Weekly:* Run once a week at a specified time without the day being specified. Used for the *Completed Order Private Data Purge*.
Days of Week	Select one or more days of the week when the job should run. Used for the *Fulfilled Inventory Export*, *Inventory Quantity Export*, *Sales Order Data Extract*, *Incremental Inventory Import*, and *Product Import*.
Day of Week	Use the drop-down menu to select the single day of the week when a *Weekly* job should run. Used only for the *Completed Order Private Data Purge*.
Minutes	The number of minutes to wait before running the scheduled job. Your entry must be a number from 1 to 59. Used for the *Email Notifications* job to indicate the number of minutes to wait before generating any emails to store locations, vendors, customers, retailers, or systems operations staff. If you change this setting and click *Save*, the job is rescheduled to use the entered number of minutes.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Time</td><td>The time of day, in HH:MM format (24-hour clock) when the job runs.
You can specify a single time for:
• Completed Order Private Data Purge
• Daily Clean Up
• Sales Order Data Extract
• Identity Cloud User Synchronization
• Product Import
• Auto Cancel Unclaimed Pickup Orders
You can specify up to 25 times, separating each by a comma, for:
• Fulfilled Inventory Export
• Inventory Quantity Export
• Incremental Inventory Import
Used for all jobs except Email Notifications, which runs using a specified interval of minutes.
If you change this setting and click Save, the job is rescheduled to run at the entered time.
If entering multiple times, separate each with a comma and no spaces.</td></tr>
<tr><td>Run Now</td><td>Select this option to run the job immediately without waiting for the scheduled day and time. Available for all jobs.
If you click Cancel after selecting Run Now, the job does not run immediately, but only according to the defined schedule.
Conflicting job: If you select the Run Now option for a job and another job that might conflict is currently running, the screen displays an error message. See Which Jobs Conflict, above.</td></tr>
<tr><td>Safe Stock Method</td><td>• Probable Quantity Rules: Apply any probable quantity rules to product locations included in the probable quantity export file. See Probable Quantity Update and Export for more information.
• No Rules (default): Similar to the Probable Quantity Update and Export, except that the probable quantity is not calculated; instead, the available to promise quantity is included in the probable quantity export file.
• Probability Rules: Use probability rules to calculate the probable quantity in the Full Overlay Inventory Quantity Extract File, and also support sending incremental inventory updates through a web service if the Incremental Updates field is set to Probability Rules. See Probability Rules Update and Incremental Quantity Web Service for more information.
Used only for the Inventory Quantity Export.
Difference between probable quantity rules and probability rules: Probable quantity rules are used to calculate the probable quantity to pass to an integrated system, such as an ecommerce site, while probability rules apply dynamically to determine the available quantity when Order Broker receives a request, such as a Submit Order request or a Locate Items request.
Also updated by Run Job API: The setting of this field is updated when the Run Job API is used to submit this job.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>File Output Type</td><td>Aggregate by Product: Select this setting to have the probable quantity export file include current total quantities of all products across all product locations; This setting available only when the Safe Stock Method is Probable Quantity Rules or No Rules.
Changed Records (default): Select this setting to have the probable quantity export file include all updated product locations. This setting is available only when the Safe Stock Method is Probable Quantity Rules or No Rules.
Full Overlay: The export process creates a file containing records for all product locations with a quantity greater than zero. This is the only available setting when the Safe Stock Method is Probability Rules; otherwise, not available.
Used only for the Inventory Quantity Export.

Also updated by Run Job API: The setting of this field is updated when the Run Job API is used to submit this job.</td></tr>
<tr><td>Incremental Updates</td><td>Controls whether to run a new background process to track product location records with any changes, in order to support responding to web service requests for inventory updates.
Probability Rules: Run the background process to track product locations with any changes. This setting is available only when the Safe Stock Method is Probability Rules; otherwise, not available.
No Update: Do not run the background process if the Safe Stock Method is Probability Rules; or the process is not available.
Used only for the Inventory Quantity Export.

Also updated by Run Job API: The setting of this field is updated when the Run Job API is used to submit this job.</td></tr>
<tr><td>Days to Keep Errors</td><td>For the Product Import, enter the number of days to retain product import history in the product_import, product_location_import, location_import, product_import_ecommerce_log, and product_import_log tables after an import process completes. Each time you run the import process for a system, it deletes these records if the indicated number of days has passed.

Once these records are deleted, you cannot review errors through the Location Import Errors Report, Product Import Errors Report, and Product Barcode Import Errors Report.

Note: The process also creates records in the import tables for records that are not in error. These records are eligible to be cleared through the Daily Cleanup job after the number of days specified in the Job History field at the Tenant-Admin screen. You can review these job history records at the Product Imports History screen or the View Job History screen.

Enter a number from 1 to 99. Required if the Enabled flag is selected. Default = 7.

Included only for the Product Import.

Also updated by Run Job API: The setting of this field is updated when the Run Job API is used to submit this job.</td></tr>
</table>

Field	Description
Aged Hours	For the *Generate Pickup Ready Reminder Emails* job, indicates how many hours after a pickup order is picked that it is eligible to receive the pickup reminder.
OCDS Configured	For the *Product Import*, set to Yes if OCDS or Merchandising Omni Services is configured; otherwise, set to No. Display-only. See below for more information. Included only for the *Product Import*.
OCDS Integration	The following three fields are used for the *Product Import*. The Schedule Interval Options, Date, and Time fields described below are available only when the system supports imports from OCDS or Merchandising Omni Services. See *OCDS or Merchandising Omni Services Imports* for background. Also, they are used only when you submit the import on demand. If the OCDS import is not enabled for any type of data, then the standard import through the file storage API takes place.
Schedule Interval Options	Use this field for the *Product Import* to select whether to run a complete import from OCDS or Merchandising Omni Services, or to import records only if they were updated since the last time you imported from OCDS or Merchandising Omni Services. This field is available only if at least one URL is flagged as active at the *OCDS Integration tab* on the *System* screen, and you have selected the Run Now flag. If you select: • *Since Last Run:* Use the Date and Time fields to indicate the cutoff date and time for importing new or changed records from OCDS or Merchandising Omni Services for all URLs that are flagged as Active at the *OCDS Integration tab* on the *System* screen. • *Full Refresh:* The import includes all eligible records, based on the URLs that are flagged as Active at the *OCDS Integration tab* on the *System* screen. **Note:** • All store and warehouse locations are always included when your import includes these options based on the settings at the *OCDS Integration tab*, regardless of whether you select *Since Last Run* or *Full Refresh*. • These options apply only when you run the import on demand by selecting *Run Now*. When the import runs as scheduled, it is always a full import. • Use caution when selecting *Full Refresh* when the active import options include store inventory or warehouse inventory, as the number of records to import can affect system performance. Included only for the *Product Import*.
Date (in OCDS Options)	Use this field for the *Product Import* to select the cutoff date for importing updated records from OCDS or Merchandising Omni Services. This field is available only if at least one URL is flagged as active at the *OCDS Integration tab* on the *System* screen, you have selected the Run Now flag, and you selected Since Last Run. If you don't specify a cutoff date and time, the import uses the last date when the import ran. Included only for the *Product Import*.

Field	Description
Time (in OCDS Options)	Use this field for the *Product Import* to select the cutoff time for importing updated records from OCDS or Merchandising Omni Services. This field is available for the *Product Import* only if at least one URL is flagged as active at the *OCDS Integration tab* on the *System* screen, you have selected the Run Now flag, and you selected Since Last Run. If you don't specify a cutoff date and time, the import uses the last time when the import ran. Included only for the *Product Import*.
Last Updated	The last date and time when the schedule was updated for the job, and the ID of the user who performed the update.
Last Run	The last date and time when the job ran. Display-only.
Next Run	The next date and time when the job is scheduled to run. Display-only. Blank for any job that is not currently enabled.
Last Status	The *Status* from the most recent time the job ran. Included only for the *Inventory Quantity Export*.
OCDS Integration	The following three fields are available only when the system supports importing from OCDS or Merchandising Omni Services. See *OCDS or Merchandising Omni Services Imports* for more information. Also, they are used only when you submit the import on demand. If the OCDS import is not enabled for any type of data, then the standard import through the file storage API takes place. **Note:** These fields are not labeled on this screen to indicate they are related to the OCDS integration.

Field	Description
Since Last Run or Full Refresh (unlabeled field)	Use this field to select whether to run a complete import from OCDS or Merchandising Omni Services, or to import records only if they were updated since the last time you imported from OCDS or Merchandising Omni Services. This field is available only if at least one URL is flagged as active at the *OCDS Integration tab* on the *System* screen, and you have selected the Run Now flag. If you select: • *Since Last Run:* Use the Date and Time fields to indicate the cutoff date and time for importing new or changed records from OCDS or Merchandising Omni Services for all URLs that are flagged as Active at the *OCDS Integration tab* on the *System* screen. • *Full Refresh:* The import includes all eligible records, based on the URLs that are flagged as Active at the *OCDS Integration tab* on the *System* screen. **Note:** • All store and warehouse locations are always included when your import includes these options based on the settings at the *OCDS Integration tab*, regardless of whether you select *Since Last Run* or *Full Refresh*. • These options apply only when you run the import on demand by selecting *Run Now*. When the import runs as scheduled, it is always a full import. • Use caution when selecting *Full Refresh* when the active import options include store inventory or warehouse inventory, as the number of records to import can affect system performance.
Date	Select the cutoff date for importing updated records from OCDS or Merchandising Omni Services. This field is available only if at least one URL is flagged as active at the *OCDS Integration tab* on the *System* screen, you have selected the Run Now flag, and you selected Since Last Run. If you don’t specify a cutoff date and time, the import uses the last date when the import ran.
Time	Select the cutoff time for importing updated records from OCDS or Merchandising Omni Services. This field is available only if at least one URL is flagged as active at the *OCDS Integration tab* on the *System* screen, you have selected the Run Now flag, and you selected Since Last Run. If you don’t specify a cutoff date and time, the import uses the last time when the import ran.

Sales Order Data Extract Files

The *Sales Order Data Extract* generates a zip file containing a set of pipe-delimited files, which contain the following types of information on sales orders and purchase orders:

- sold-to customer
- customization
- items

- order totals, locations, and other general order data
- order shipments
- ship-to customer
- status history

File naming: The zip file is named EXPORT_DATA_ORGANIZ_CD_20190825_045700, where ORGANIZ_CD is the organization code, 20190825 is the date generated in YYYYMMDD format, and 045700 is the time generated in HHMMSS format.

See *File Storage API for Imports and Exports* for information on receiving the exported files.

In this topic:

- *XOM_CUSTOMER*
- *XOM_CUSTOMIZATION*
- *XOM_ITEM*
- *XOM_ORDER*
- *XOM_ORDER_SHIPMENT*
- *XOM_SHIPPING*
- *XOM_STATUS_HISTORY*

For more information: See:

- *Sales Order Data Extract* for information on scheduling the extract and creating the extract files.
- *View Sales Order Data Extract Job History* for information on reviewing extract job history.

XOM_CUSTOMER

The table below lists the fields in the XOM_CUSTOMER pipe-delimited file, containing extracted data on the customer who placed each order. The information is found in the XOM_CUSTOMER table in the database.

The complete file name is EXPORT_DATA_XOM_CUSTOMER_ORGANIZ_CD_20190825_045700.dat, where ORGANIZ_CD is the organization code, 20190825 is the date generated in YYYYMMDD format, and 045700 is the time generated in HHMMSS format.

The file contains a header row. The heading for each column is indicated in the table below.

Personal data? If the Include Private Data flag was not selected when the export was generated, the data for all personal data fields in the file are replaced with the text `***** Data Privacy Blocked *****`. The fields that can be masked include:

- Name fields
- Address fields, with the exception of the city, territory (province or state), and postal (zip) code
- Phone numbers

The information might also be masked because the order has already been *anonymized*. In this case, the data is replaced with a row of asterisks.

Field attributes: The field attributes listed below are based on what is supported through the database and the *submit order message*, or in the *CreateDSOrder* request message in the case of a purchase order.

For more information: See the of the *Order* screen for more information on customer-related fields in context, and see the *Purchase Order* screen for information on customer-related fields on purchase orders.

Column Heading	Attributes	Description
REQUEST_ID	Numeric, 10	A unique number assigned by Order Broker to identify an order.
ORDER_ID	Alphanumeric, 30	The number identifying the order in the originating system.
LAST_NAME	Alphanumeric, 50	The last name of the sold-to customer.
MIDDLE_NAME	Alphanumeric, 50	The middle name of the sold-to customer.
FIRST_NAME	Alphanumeric, 50	The first name of the sold-to customer.
PREFIX	Alphanumeric, 50	The prefix to the sold-to-customer's name, such as Dr. or Ms.
SUFFIX	Alphanumeric, 50	The suffix to the sold-to customer's name, such as Jr.
ADDRESS_1	Alphanumeric, 50	The first line of the sold-to customer's address.
ADDRESS_2	Alphanumeric, 50	The second line of the sold-to customer's address.
ADDRESS_3	Alphanumeric, 50	The third line of the sold-to customer's address.
ADDRESS_4	Alphanumeric, 50	The fourth line of the sold-to customer's address.
CITY	Alphanumeric, 50	The city or town of the sold-to customer's address.
TERRITORY	Alphanumeric, 50	The state, province, or territory of the sold-to customer's address.
POSTAL_CODE	Alphanumeric, 50	The zip or postal code of the sold-to customer's address.
DAY_PHONE	Alphanumeric, 50	The daytime phone number of the sold-to customer.
EVENING_PHONE	Alphanumeric, 50	The evening phone number of the sold-to customer.
EMAIL	Alphanumeric, 250	The email address of the sold-to customer.
COUNTRY	Alphanumeric, 3	The code identifying the country of the sold-to customer's address.
COMPANY_NAME	Alphanumeric, 50	The name of the sold-to customer's company.
CUSTOMER_NO	Alphanumeric, 30	The code identifying the customer in the originating system.

Column Heading	Attributes	Description
APT	Alphanumeric, 50	The apartment or suite of the sold-to customer's address.
TAX_EXEMPTION_NUMBER	Alphanumeric, 50	Future use.
UNFORMATTED_PHONE	Alphanumeric, 50	The customer's daytime phone number with any formatting characters removed.

XOM_CUSTOMIZATION

The table below lists the fields in the XOM_CUSTOMIZATION pipe-delimited file, containing extracted data on any customization or special handling for order lines. The information is found in the XOM_ORDER_ITEM_CUSTOMIZATION table in the database.

The complete file name is EXPORT_DATA_XOM_CUSTOMIZATION_ORGANIZ_CD_20190825_045700.dat, where ORGANIZ_CD is the organization code, 20190825 is the date generated in YYYYMMDD format, and 045700 is the time generated in HHMMSS format.

The file contains a header row. The heading for each column is indicated in the table below.

Personal data? This file does not contain any personal data.

Field attributes: The field attributes listed below are based on what is supported through the database and the *submit order message*, or in the *CreateDSOrder* in the case of a purchase order.

For more information: See the SubmitOrder Request Message and CreateDSOrder Request Message chapters in the Operations Guide for more information on how customization information is passed from the originating system.

Column Heading	Attributes	Description
REQUEST_ID	Numeric, 10	A unique number assigned by Order Broker to identify an order.
LINE_NUMBER	Numeric, 10	The order line number receiving the customization.
SEQUENCE	Numeric, 10	A unique number to identify each record.
CODE	Alphanumeric, 50	The code used to identify the type of customization.
MESSAGE	Alphanumeric	The description of the customization.

XOM_ITEM

The table below lists the fields in the XOM_ITEM pipe-delimited file, containing extracted data on the lines on orders. The information is found in the XOM_ITEM table in the database.

The complete file name is EXPORT_DATA_XOM_ITEM_ORGANIZ_CD_20190825_045700.dat, where ORGANIZ_CD is the organization code, 20190825 is the date generated in YYYYMMDD format, and 045700 is the time generated in HHMMSS format.

The file contains a header row. The heading for each column is indicated in the table below.

Personal data? This file does not contain any personal data.

Field attributes: The field attributes listed below are based on what is supported through the database and the *submit order message*, or in the *CreateDSOrder* in the case of a purchase order.

See the *Details tab* at the **Order** screen for more information on order detail lines, or see the *Purchase Order* screen for information on purchase orders.

Column Heading	Attributes	Description
REQUEST_ID	Numeric, 10	A unique number assigned by Order Broker to identify an order.
ORDER_ID	Alphanumeric, 30	The number identifying the order in the originating system.
LINE_NUMBER	Numeric, 10	The order line number assigned by Order Broker.
PRODUCT_CD	Alphanumeric, 35	The product code for the default system in the organization.
PRODUCT_DESCRIPTION	Alphanumeric, 40	The description of the item.
QUANTITY	Number, 10	The requested quantity of the item.
LINE_ITEM_AMOUNT	Number, 19.4	The single-unit price for the item charged by the originating system.
LINE_TAX_AMOUNT	Number, 19.4	The total tax amount charged for a single unit of the item, passed by the originating system.
FULFILL_LOCATION_CD	Alphanumeric, 10	The code identifying the fulfilling location, or the sourcing location for a ship-for-pickup order.
FULFILL_SYSTEM_CD	Alphanumeric, 10	The code identifying the system associated with the fulfilling location.
STATUS	Alphanumeric	The current status of the order line. See *Order and Line Statuses* for more information.
STATUS_DATE	Date	The date and time of the most recent status update.
EXTENDED_DATA	Alphanumeric	Any special instructions for the purchase order line or sales order line passed by the originating system, and stored in the EXTENDED_DATA field in the XOM_ITEM table.
REQUESTER_LINE_NUMBER	Number, 10	The line number in the originating system.
ORIGINAL_LINE_NUMBER	Number, 10	Identifies the original line number on a sales order if the line was split. Otherwise, set to 0.
ORIGINAL_QUANTITY	Number, 10	Identifies the original quantity of the line on a sales order was split. May differ from the QUANTITY if the line was split.
POLLED_COUNT	Number, 10	The number of times the order line on a sales order has been polled.
EXTENDED_FREIGHT	Number, 19.4	The extended freight charge passed by the originating system.
CUSTOMIZATION_CHARGE	Number, 19.4	The charge amount for customization of the line.
GIFT_WRAP	Alphanumeric, 1	Set to Y if the item should be gift wrapped; otherwise, set to N.

Column Heading	Attributes	Description
SHIP_ALONE	Alphanumeric, 1	Set to Y if the item requires shipping alone; otherwise, set to N.
MESSAGES	Alphanumeric	Any message passed for the order line. Stored in the NOTE table in the database.
UNIT_SHIP_WEIGHT	Numeric, 8.3	The unit shipping weight of the item, as passed by the originating system.
BATCH_ID	Number, 10	A number assigned to group lines for printing and updating status.
SHIPMENT_ID	Number, 10	Identifies a record in the *XOM_ORDER* file if the item has been shipped.
PICKUP_LOCATION_CD	Alphanumeric, 10	The code identifying the location where the customer picks up the sales order. Included only for pickup or ship-for-pickup orders.
PICKUP_SYSTEM_CD	Alphanumeric, 10	The code identifying the system associated with the location where the customer picks up the sales order. Included only for pickup or ship-for-pickup orders.
PICKUP_BY_DATE	Date	The date and time when the order line on a sales order is eligible to be automatically canceled.
AUTO_CANCELLED	Date	A setting of 1 indicates that the order line on a sales order was automatically canceled; otherwise, set to 0 or blank. See *Auto-Cancel Unclaimed Orders* for background.

XOM_ORDER

The table below lists the fields in the XOM_ORDER pipe-delimited file, containing extracted data about the orders. The information is found in the XOM_ORDER table in the database.

The complete file name is EXPORT_DATA_XOM_ORDER_ORGANIZ_CD_20190825_045700.dat, where ORGANIZ_CD is the organization code, 20190825 is the date generated in YYYYMMDD format, and 045700 is the time generated in HHMMSS format.

The file contains a header row. The heading for each column is indicated in the table below.

Personal data? If the Include Private Data flag was not selected when the export was generated, the data for all personal data fields in the file are replaced with `***** Data Privacy Blocked *****`.

The information might also be masked because the order has already been *anonymized*. In this case, the data is replaced with a row of asterisks.

Field attributes: The field attributes listed below are based on what is supported in the database and through the *submit order message*, or in the *CreateDSOrder* request message in the case of a purchase order.

Column Heading	Attributes	Description
REQUEST_ID	Numeric, 10	A unique number assigned by Order Broker to identify an order.

Column Heading	Attributes	Description
ORDER_ID	Alphanumeric, 30	The number identifying the order in the originating system.
CREATE_TIMESTAMP	Date	The date and time when the order was created in Order Broker.
ORDER_TYPE	Alphanumeric	Possible order types: • DELIVERY • PICKUP • PURCHASE ORDER • SHIP FOR PICKUP
ORDER_DATE	Date	The transaction date passed by the originating system.
SUBTOTAL_AMOUNT	Number, 19.4	The order total before taxes as passed by the originating system.
TAX_AMOUNT	Number, 19.4	The total taxes for the order as passed by the originating system
TAX_DESCRIPTION	Alphanumeric, 30	The same as the TAX_AMOUNT.
TOTAL_AMOUNT	Number, 19.4	The total amount for the transaction as passed by the originating system.
ORIGINATING_EMPLOYEE_ID	Alphanumeric, 10	From the employee ID passed by the originating system, or the buyer ID for a purchase order.
ORIGINATING_TRANS_ID	Alphanumeric, 50	The transaction number passed by the originating system for a sales order.
ORIGINATING_CHANNEL	Number, 10	The originating channel passed by the originating system for a sales order.
ORIGINATING_LOCATION_CD	Alphanumeric, 10	The code identifying the originating location passed by the originating system.
ORIGINATING_SYSTEM_CD	Alphanumeric, 10	The code identifying the system associated with the originating location, passed by the originating system.
STATUS	Alphanumeric	The current status of the order. See *Order and Line Statuses* for more information.
STATUS_DATE	Date	The most recent date and time when the status of the order was updated.
EXTENDED_DATA	Alphanumeric	The special instructions passed by the originating system.
SHIP_VIA	Alphanumeric, 50	The code identifying the carrier for the order, passed by the originating system.
SHIP_VIA_DESCRIPTION	Alphanumeric, 50	The description of the carrier for the order, passed by the originating system.
GIFT	Alphanumeric, 1	Set to Y to indicate that the order is a gift, passed by the originating system.
FREIGHT_AMOUNT	Number, 19.4	The total freight charges for the order, passed by the originating system.

Column Heading	Attributes	Description
BALANCE_DUE	Number 19,4	The amount due when the order is picked up, typically used to indicate the balance due for a pickup or ship-for-pickup order. From the `balance_due` passed in the SubmitOrder request message.
SOURCE_CODE	Alphanumeric, 50	A code identifying the source of the sales order in the originating system. From the `source_code` passed in the SubmitOrder request message.
POLLED_COUNT	Numeric, 10	Set to 0.
REF_TRANSACTION_NO	Alphanumeric, 50	From the `ref_transaction_no` passed in the SubmitOrder request message for a sales order.
CURRENCY	Alphanumeric, 10	The three-position alphabetical ISO 4217 currency code for the order. From the currency passed by the originating system.
ADDITIONAL_FREIGHT	Number, 19.4	The additional freight on the order, passed by the originating system.
ADDITIONAL_CHARGES	Number, 19.4	The additional charges on the order, passed by the originating system.
SHIP_COMPLETE	Alphanumeric, 1	Set to Y if the order should ship complete.
NOTES	Alphanumeric	Any message passed in the `order_message` tag of the SubmitOrder request message for a sales order. Stored in the NOTE table in the database.
GIFT_MESSAGES	Alphanumeric	Any gift message passed by the originating system. Stored in the NOTE table in the database.
FREIGHT_TAX	Number, 19.4	The tax on freight for the order passed by the originating system.
UNDER_REVIEW	Numeric, 1	Set to 1 if the sales order is currently under review; otherwise, set to 0.
IN_PROCESS	Alphanumeric, 1	Set to Y if the sales order has not yet been “shopped” to a fulfilling location; otherwise, set to N.
FULFILLMENT_OVERRIDE	Numeric, 1	Set to 1 if the sourcing location was specified in the SubmitOrder request for a ship-for-pickup order; otherwise, set to 0. Defaults to 0. Only used for new orders created in 16.0 or higher.

XOM_ORDER_SHIPMENT

The table below lists the fields in the XOM_ORDER_SHIPMENT pipe-delimited file, containing extracted data on the shipments made for orders. The information is found in the XOM_ORDER_SHIPMENT table in the database.

The complete file name is EXPORT_DATA_XOM_ORDER_SHIPMENT_ORGANIZ_CD_20190825_045700.dat, where ORGANIZ_CD is the organization code, 20190825 is the date generated in YYYYMMDD format, and 045700 is the time generated in HHMMSS format.

The file contains a header row. The heading for each column is indicated in the table below.

Personal data? This file does not contain any personal data.

Field attributes: The field attributes listed below are based on what is supported through the StatusUpdate request message and the database.

Column Heading	Attributes	Description
SHIPMENT_ID	Number, 10	A unique number to identify a shipment.
CARRIER_CODE	Alphanumeric, 50	From the carrier or shipping agent passed by the originating system.
TRACKING_NUMBER	Alphanumeric, 255	From the `tracking_number` passed in the Order Status Update request message for a sales order.
SHIPMENT_DATETIME	Date	The date and time of the shipment.
FREIGHT_CHARGES	Number, 19.4	From the freight charges in the XOM_ORDER_SHIPMENT table.
ACTUAL_WEIGHT	Number, 12.4	The package weight.
FULFILLMENT_ID	Alphanumeric, 255	A package identifier.

XOM_SHIPPING

The table below lists the fields in the XOM_SHIPPING pipe-delimited file, containing extracted data on the customer who receives each order. A separate record is created for each shipped line.The information is found in the XOM_SHIPPING table in the database.

The complete file name is EXPORT_DATA_XOM_SHIPPING_ORGANIZ_CD_20190825_045700.dat, where ORGANIZ_CD is the organization code, 20190825 is the date generated in YYYYMMDD format, and 045700 is the time generated in HHMMSS format.

The file contains a header row. The heading for each column is indicated in the table below.

Personal data? If the Include Private Data flag was not selected when the export was generated, the data for all personal data fields in the file are replaced with `***** Data Privacy Blocked *****`. The fields that can be masked include:

- Name fields
- Address fields, with the exception of the city, territory (province or state), postal (zip) code, and country code
- Phone numbers

Field attributes: The field attributes listed below are based on what is supported through the SubmitOrder request message and the database.

For more information: See the *Header tab* of the *Order* screen for more information on customer-related fields in context, and see the *Purchase Order* screen for information on customer-related fields on purchase orders.

Column Heading	Attributes	Description
REQUEST_ID	Numeric, 10	A unique number assigned by Order Broker to identify an order.

Column Heading	Attributes	Description
ORDER_ID	Alphanumeric, 30	The number identifying the order in the originating system.
LINE_NUMBER	Numeric, 10	The order line number shipped.
LAST_NAME	Alphanumeric, 50	The last name of the ship-to customer.
MIDDLE_NAME	Alphanumeric, 50	The middle name of the ship-to customer.
FIRST_NAME	Alphanumeric, 50	The first name of the ship-to customer.
PREFIX	Alphanumeric, 50	The prefix to the ship-to customer's name, such as Dr. or Ms.
SUFFIX	Alphanumeric, 50	The suffix to the ship-to customer's name, such as Jr.
ADDRESS_1	Alphanumeric, 50	The first line of the ship-to customer's address.
ADDRESS_2	Alphanumeric, 50	The second line of the ship-to customer's address.
ADDRESS_3	Alphanumeric, 50	The third line of the ship-to customer's address.
ADDRESS_4	Alphanumeric, 50	The fourth line of the ship-to customer's address.
CITY	Alphanumeric, 50	The city or town of the ship-to customer's address.
TERRITORY	Alphanumeric, 50	The state, province, or territory of the ship-to customer's address.
POSTAL_CODE	Alphanumeric, 50	The zip or postal code of the ship-to customer's address.
COUNTRY	Alphanumeric, 3	The three-position alphabetical or numeric (ISO Spec 3166) of the ship-to customer's country.
DATE_	Date	The date and time when the order was created.
REFERENCE	Alphanumeric, 50	The shipping tracking number. From the `tracking_number` in the Order Status Update request message for a sales order.
VIA	Alphanumeric, 50	The shipper for the order. From the `shipping_agent` in the Order Status Update request message for a sales order.
DAY_PHONE	Alphanumeric, 50	The daytime phone number of the ship-to customer.
EVENING_PHONE	Alphanumeric, 50	The evening phone number of the ship-to customer.
EMAIL	Alphanumeric, 250	The email address of the ship-to customer.
COUNTRY	Alphanumeric, 3	The code identifying the country of the ship-to customer's address.
APT	Alphanumeric, 50	The apartment or suite of the ship-to customer's address.

XOM_STATUS_HISTORY

The table below lists the fields in the XOM_STATUS_HISTORY pipe-delimited file, containing extracted data on the status history of each order. The information is found in the XOM_STATUS_HISTORY table in the database.

The complete file name is EXPORT_DATA_XOM_STATUS_HISTORY_ORGANIZ_CD_20190825_045700.dat, where ORGANIZ_CD is the organization code, 20190825 is the date generated in YYYYMMDD format, and 045700 is the time generated in HHMMSS format.

The file contains a header row. The heading for each column is indicated in the table below.

Personal data? The EMPLOYEE_ID in the file is not masked regardless of whether the Include Private Data flag was selected.

Field attributes: The field attributes listed below are based on what is supported through the SubmitOrder request message and the database.

For more information: See the *Header tab* of the *Header tab* screen for more information on customer-related fields in context, and see the *Purchase Order* screen for information on customer-related fields on purchase orders.

Column Heading	Attributes	Description
REQUEST_ID	Numeric, 10	A unique number assigned by Order Broker to identify an order.
ORDER_ID	Alphanumeric, 30	The number identifying the order in the originating system.
LINE_NUMBER	Numeric, 10	The order line number related to the activity.
SEQUENCE	Number, 10	A unique number to identify the status history record for the order.
ACTIVITY_DATE	Date	The date and time when the activity occurred.
STATUS	Alphanumeric	The status of the order line at the time of the activity. See *Order and Line Statuses* for more information on sales orders.
REASON	Alphanumeric, 50	The description of the status code, as described for the STATUS field, above. The same as the STATUS, except: • When the activity was the removal of personal data, the reason is PII REMOVED. • When the status changes to accepted, picked, accepted, fulfilled, the REASON is blank.
EMPLOYEE_ID	Alphanumeric, 10	The employee ID indicated for the order creation or status change.
TRANS_ID	Alphanumeric, 50	The `transaction_no` passed by the originating system in the SubmitOrder request message for a sales order.
FULFILL_LOCATION_CD	Alphanumeric, 10	The code identifying the location to fulfilling location, or the sourcing location for a ship-for-pickup order.
FULFILL_SYSTEM_CD	Alphanumeric, 10	The code identifying the system associated with the fulfilling location.

Column Heading	Attributes	Description
SHIP_VIA	Alphanumeric, 50	The code identifying the carrier for the order. From the `ship_via` passed in the SubmitOrder request message or the `shipping_agent` in the Status Update message for a sales order.
SHIPPING_REFERENCE	Alphanumeric, 50	From the `ship_via_description` passed in the SubmitOrder request message or the `tracking_number` in the Status Update request message for a sales order.
QUANTITY	Number, 10	The order line quantity associated with the activity.
SOURCE	Alphanumeric	The source associated with the activity: UI = User Interface WS = Web Service or API
ORDER_STATUS_REASON_CODE	Alphanumeric, 30	The status reason code, if any, passed in the Order Status Update request message for a sales order.
ORDER_STATUS_REASON_NOTE	Alphanumeric, 254	A note about the activity, if any, from the `order_status_reason_note` passed in the Order Status Update request message for a sales order. This field is also updated with the current Under Review status when the order is initially created, or when the Under Review status changes.
EXPORT_DATE	Date	The date when the sales order was exported through the *Sales Order Data Extract*.
CARTON_NBRS	Alphanumeric, 500	The carton numbers used to ship the sales order.
SHIP_TO_CHANGE_ID	Number, 10	A value in this field indicates that there has been a shipping address change for a sales order. You can review shipping address changes at the *Order History Detail - Address Change Window*.
UNFULFILLABLE_REASON_CODE	Number, 10	A reason code generated by the Science Engine if a sales order is partially or fully unfulfillable. See the discussion of Science Engine responses at *History tab* of the **Order** screen for more information.
PICKUP_BY_DATE	Date	The last date before a pickup or ship-for-pickup order is eligible to be canceled by the *auto-cancel unclaimed orders job*.
PICKUP_BY_DATE_CHANGED	Numeric, 1	If set to 1, indicates to display the Pickup By Date in order history as a change.

OCDS or Merchandising Omni Services Imports

About OCDS or Merchandising Omni Services integration: You can use integration with the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services to import data from Oracle Retail Merchandising Foundation Cloud Service (RMFCS). When you use ODCS or Merchandising Omni Services for these imports, Order Broker generates web service requests to OCDS or Merchandising Omni Services for this information rather than processing an upload file.

Required setup: To import data through the integration with OCDS or Merchandising Omni Services:

- Use the *OCDS Integration tab* at the **System** screen to define the URLs for requests to OCDS or Merchandising Omni Services, as well as other data required for the integration, including the maximum number of records to request for each import type and authentication information.
- Use the *Schedule Jobs* screen to submit the imports. If any of the URLs are specified at the *OCDS Integration tab* at the **System** screen and are flagged as active, this screen triggers the import from OCDS or Merchandising Omni Services rather than another data import method.

See each of the imports described below for more details on required configuration and mapping.

Confirming the version number of OCDS: If you need to confirm the version of OCDS, you can submit a web service request to a URL such as `https://SERVER/ords/ocds/omnichannel/v1/admin/version`, where `SERVER` is the name of the server.

OCDS returns a response that includes something such as the following:

"version": "16.0.031",

"hotfix": "ocds-hf-003.0"

Where `16.0.031` is the version and `003` is the hot fix.

In this topic:

- *OCDS or Merchandising Omni Services Import Steps*
- *Store Location Import Mapping*
- *Warehouse Location Import Mapping*
- *Product Import Mapping*
- *Item Image URL Import Mapping*
- *Product Barcode Import Mapping*
- *Store and Warehouse Inventory Import Mapping*

For more information: See:

- *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for an overview on import processes and background information.
- *Schedule Jobs* for more information on setting up the import schedule or running the import process on demand.

OCDS or Merchandising Omni Services Import Steps

The import steps are:

1. Use the *OCDS Integration tab* at the *System* screen to specify the URLs for each type of import to take place, activate selected imports, and complete additional information such as the location types to use when creating location records and connection information for OCDS or Merchandising Omni Services.

If any of the URLs are flagged as active at the OCDS Integration tab, the OCDS or Merchandising Omni Services import process runs rather than any other import process.

2. Use the *Schedule Jobs* screen to schedule the import, or run it on demand. If you select *Run Now*, you need to also indicate whether to perform a *Full Refresh* or *Since Last Run*; however, the store location and virtual warehouse location imports always perform a full refresh. See the *OCDS Integration* fields at this screen for more information.

> **Note:**
>
> Use caution when selecting *Full Refresh* when the active import options include store inventory or warehouse inventory, as the number of records to import can affect system performance.

Troubleshooting: If one of the URLs specified at the *OCDS Integration tab* at the *System* screen is incorrect, this is not listed as an error at the *Product Imports History* screen; however, the issue is noted as a communication error in the tenant error log file.

Error reports: See the *Location Import Errors Report* for errors that occur related to missing location name or code, and see the *Product Import Errors Report* for errors that occur related to the product or product description.

No report is generated for any store or warehouse inventory records; however, an error file is available through the file storage API. See *Product Location Import Error Files* for more information.

Batch size: The import process uses the Job Batch Size specified at the **Tenant-Admin** screen to indicate the maximum number of records that OCDS or Merchandising Omni Services should return at a time. This number, typically set to 1000, is appended to the request messages to OCDS or Merchandising Omni Services for each import type. Order Broker continues submitting requests until OCDS or Merchandising Omni Services no longer indicates that there are more records to return.

No deletions: The OCDS or Merchandising Omni Services import creates or updates records. No deletions take place as a result of this import.

> **Note:**
>
> The request messages to OCDS or Merchandising Omni Services include `"Accept-Encoding: gzip"` in the request header, in order to receive compressed data in the response and enhance processing performance.

Store Location Import Mapping

The table below lists the fields updated for store locations through import from OCDS or Merchandising Omni Services.

Requirements: To import store locations from OCDS or Merchandising Omni Services, complete the following fields at the *OCDS Integration tab* tab at the **System** screen:

- Complete the Store Location URL and select the Active flag.
- Use the Default Location Type for store locations to select the Location Type to assign to imported store locations.

Unmapped fields: Any fields not listed in the following table do not exist in OCDS or Merchandising Omni Services or are not mapped or updated through the import process. To update some of these additional fields:

- Use the *Edit Location* screen to specify additional information, such as days open for auto-cancel or labor cost. Additional fields that you can define at the Edit Location screen, such as store hours, rank, and region, are informational only.
- Use the *Preferences* screen to define the types of orders that the store location is eligible to fulfill. You can set these preferences for the location type, and then optionally set overrides at the location level.

Invalid address? The import process creates a location record even if the address specified in the import response is incomplete or invalid. If the location is not included as expected in inventory search results or order assignments, you can use the *Edit Location* to verify or correct the address.

Update Latitude and Longitude: The import process updates the location's *Latitude* and *Longitude* when creating or updating the location, providing the location is valid. See *Proximity Locator Searching* for an overview.

Days Open not updated: The *Days Open* fields for a location are all automatically selected when the import process creates a new location, and the existing settings are not updated when the import process updates an existing location. You can update these fields at the *Edit Location* screen, or through the *Location Bulk Updates* wizard.

Error report: The *Location Import Errors Report* lists any errors that occur related to missing location name or code. These are the only two errors that can occur related to imported locations through OCDS or Merchandising Omni Services.

No records are deleted through the import.

Note:

Regardless of whether you select *Run Now* or *Since Last Run* at the *Schedule Jobs* screen, all store locations are imported each time you submit the import.

Field	Attributes	Description
system	alphanumeric, 10 positions	From the system selected at the *Schedule Jobs* screen.
location type	alphanumeric, 10 positions	From the *Default Location Type (store)* specified at the *OCDS Integration* tab at the **System** screen.
location	alphanumeric, 10 positions	See *location*. If the location code does not exist, the system creates a new location; if the location code already exists, the system updates the location.
name	alphanumeric, 40 positions	Description of the store location. Always updated.

Field	Attributes	Description
phone	alphanumeric, 20 positions	Optional.
fax	alphanumeric, 20 positions	Optional.
contact name	alphanumeric, 50 positions	Optional.
email	alphanumeric, 255 positions	The email address must be formatted as user@host.com (or other valid suffix such as .org). Order Broker does not validate that your entry represents an existing email address. Separate multiple email addresses with a semicolon (;). **Address fields:** The import process updates all address information if any address information was included in the import response, including clearing the data in any of the address fields that are blank or empty in the response from OCDS or Merchandising Omni Services.
address lines 1 through 3	alphanumeric, 50 positions	Optional.
city	alphanumeric, 35 positions	Optional.
state/province	alphanumeric, 3 positions	Required if you use the *proximity locator*. Should be a valid ISO code.
postal code	alphanumeric, 10 positions	The ZIP or postal code for the location. Required if you use the *proximity locator*. **Note:** To prevent issues with proximity calculation, Canadian postal codes should be imported with an embedded space. For example, the correct format is Y1A 1A3 rather than Y1A1A3.
country	alphanumeric, 3 positions	Required if you use the *proximity locator*; in this situation, the country code must exist in the proximity table. Should be a valid ISO code. **Note:** The import process creates a location record even if the address specified in the import response is incomplete or invalid. If the location is not included as expected in inventory search results or order assignments, you can use the *Edit Location* to verify or correct the address.

Warehouse Location Import Mapping

The table below lists the fields updated for virtual warehouse locations through import from OCDS or Merchandising Omni Services.

Requirements: To import virtual warehouse locations from OCDS or Merchandising Omni Services, complete the following fields at the *OCDS Integration tab* tab at the **System** screen:

- Complete the Warehouse Location URL and select the Active flag.
- Use the Default Location Type for warehouse locations to select the Location Type to assign to imported warehouse locations.

Virtual warehouses only: The OCDS or Merchandising Omni Services integration imports virtual warehouses only; it does not import physical warehouses. Because the warehouses are virtual locations, the address information that is imported is from the physical warehouse associated with the virtual warehouse.

> **Note:**
>
> The virtual warehouse is imported only if the warehouse ID (`warehouseid`) specified in the response message from OCDS or Merchandising Omni Services is different from the physical warehouse ID (`physicalwh`) in the response.

Unmapped fields: Any fields not listed in the following table do not exist in OCDS or Merchandising Omni Services or are not mapped or updated through the import process. To update some of these additional fields:

- Use the *Edit Location* screen to specify additional information, such as days open for auto-cancel or labor cost. Additional fields that you can define at the **Edit Location** screen, such as store hours, rank, and region, are informational only.
- Use the *Preferences* screen to define the types of orders that the warehouse location is eligible to fulfill. You can set these preferences for the location type, and then optionally set overrides at the location level.

Days Open not updated: The *Days Open* fields for a location are all automatically selected when the import process creates a new location, and the existing settings are not updated when the import process updates an existing location. You can update these fields at the *Edit Location* screen, or through the *Location Bulk Updates* wizard.

Error report: The *Location Import Errors Report* lists any errors that occur related to missing location name or code. These are the only two errors that can occur related to imported locations through OCDS or Merchandising Omni Services.

No records are deleted through the import.

> **Note:**
>
> Regardless of whether you select *Run Now* or *Since Last Run* at the *Schedule Jobs* screen, all virtual warehouses are imported each time you submit the import.

Field	Attributes	Description
system	alphanumeric, 10 positions	From the system selected at the *Schedule Jobs* screen.
location type	alphanumeric, 10 positions	From the *Default Location Type (warehouse, unlabeled)* specified at the *OCDS Integration* tab at the **System** screen.
location	alphanumeric, 10 positions	See *location*. If the location code does not exist, the system creates a new location; if the location code already exists, the system updates the location.
name	alphanumeric, 40 positions	Description of the store location. Always updated.
address lines 1 through 3	alphanumeric, 50 positions	Optional.
		Address fields: The import process updates all address information for the physical warehouse associated with the virtual warehouse, including clearing the data in any of the address fields that are blank or empty in the response from OCDS or Merchandising Omni Services or Merchandising Omni Services. Physical warehouses are associated with virtual warehouses based on the PHYSICAL_WH defined in the WAREHOUSE table in the OCDS or Merchandising Omni Services database.
city	alphanumeric, 35 positions	Optional.
state/province	alphanumeric, 3 positions	Required if you use the *proximity locator*. Should be a valid ISO code.
postal code	alphanumeric, 10 positions	The ZIP or postal code for the location. Required if you use the *proximity locator*. **Note:** To prevent issues with proximity calculation, Canadian postal codes should be imported with an embedded space. For example, the correct format is Y1A 1A3 rather than Y1A1A3.
country	alphanumeric, 3 positions	Required if you use the *proximity locator*; in this situation, the country code must exist in the proximity table. Should be a valid ISO code. **Note:** The import process creates a location record even if the address specified in the import response is incomplete or invalid. If the location is not included as expected in inventory search results or order assignments, you can use the *Edit Location* to verify or correct the address.

Product Import Mapping

The table below lists the fields updated for products and system products through import from OCDS or Merchandising Omni Services. When the system is the default, the import creates both product and system product records; otherwise, the import creates just the system product record.

Requirements: To import products and create system products from OCDS or Merchandising Omni Services, complete the following fields at the *OCDS Integration tab* tab at the **System** screen, complete the Products URL and select the Active flag.

The product must already exist in the organization's default system in order to create or update the system product for a non-default system.

Error report: The *Product Import Errors Report* lists any errors that occur. Typically, the only possible error that can occur is if no product description is provided.

No records are deleted through the import.

Field	Attributes	Description
system	alphanumeric, 10 positions	From the system selected at the *Schedule Jobs* screen.
product and system product	alphanumeric, 35 positions	Both from the item passed by OCDS or Merchandising Omni Services. Not updated after initial product creation in Order Broker.
description	alphanumeric, 40 positions	From the `description` passed by OCDS or Merchandising Omni Services. Truncated if it exceeds 40 positions.
master style	alphanumeric, 35 positions	From the `itemparent` passed by OCDS or Merchandising Omni Services (up to 25 positions, alphanumeric).
department	alphanumeric, 40 positions	From the `dept` passed by OCDS or Merchandising Omni Services (4 positions, numeric).
class	alphanumeric, 40 positions	From the `class` passed by OCDS or Merchandising Omni Services (4 positions, numeric).
subclass	alphanumeric, 40 positions	From the `subclass` passed by OCDS or Merchandising Omni Services (4 positions, numeric). Displayed as the product Category in Order Broker.

Item Image URL Import Mapping

Importing item image URLs to display in Store Connect works the same way as the product import described above, except for the additional setup requirements at the *OCDS Integration tab* at the **System** screen for the default system: you need to complete the Product Image URL and select the Active flag.

The item image URL should be formatted as `https://www.example.com/folder/image.png`, where:

- `http` or `https` is the protocol
- `www.example.com` is the domain or server name
- `folder` is a folder or subfolder where the image is found
- `image.png` or `image.jpg` is the name of the image

Image image URL updated? If the *Product Image URL* specified at the **System** screen for the default system is valid, and the URL passed does not exceed 255 positions, the import uses the `imageuri` passed in the response to update the Image URL for the product.

Errors: If the specified item image URL is not formatted correctly, or if it exceeds 255 positions, an error is returned and is listed on the *Product Import Errors Report*.

Product Barcode Import Mapping

Importing product barcode that can be used to scan items in Store Connect works the same way as the imports described above, except for the additional setup requirements at the *OCDS Integration tab* at the **System** screen for the default system: you need to complete the Product Barcode URL and select the Active flag.

If a product barcode already exists for the product, it is not overwritten; instead, an additional barcode is created. Existing barcodes are deleted through integration with OCDS or Merchandising Omni Services if the *Action* passed is Delete. Deleted records are included in the *UPC Records* count at the *Product Imports History* screen.

Errors: Any errors are listed on the Product Barcode Import Errors Report.

Store and Warehouse Inventory Import Mapping

The table below lists the fields in the product location record that are updated through store inventory and warehouse inventory imports from OCDS or Merchandising Omni Services. Both of these imports work the same way to update product locations in Order Broker, except for the setup requirements at the *OCDS Integration tab* tab at the **System** screen:

- To import store inventory, complete the Store Inventory URL and select the Active flag.
- To import warehouse inventory, complete the Warehouse Inventory URL and select the Active flag.

Record created? The import creates the product location if it does not already exist, provided both the product and the location already exist for the requesting system. If both the product and the location do not already exist, the record is counted as an error.

Errors: No report is generated for any store or warehouse inventory records; however, an error file is available through the file storage API. See *Product Location Import Error Files* for more information.

Additional fields for the product location, including the Next PO Date and Next PO Quantity, are not updated.

> **Note:**
>
> - You would ordinarily run these imports just once as an initial load of data; however, you have the option of using the Since Last Run option if you run the import on demand at the *Schedule Jobs* screen.
> - Because of the potentially large number of records, it is important to run this import at a time when it will have less effect on system performance.
> - The available quantity is also updated interactively through the Oracle Retail Integration Cloud Service (RICS) when *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS or Merchandising Omni Services)* is implemented. See *Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)* for a summary.

No records are deleted through the import.

Field	Attributes	Description
system	alphanumeric, 10 positions	From the system selected at the *Schedule Jobs* screen.
product	alphanumeric, 35 positions	From the item passed by OCDS or Merchandising Omni Services.
location	alphanumeric, 10 positions	From the location passed by OCDS or Merchandising Omni Services.
available quantity	numeric, 10 positions	From the availablequantity passed by OCDS or Merchandising Omni Services. **Note:** Interactive updates to the available quantity for product locations take place through Oracle Retail Integration Cloud Service (RICS). This information originates in Oracle Retail Merchandising Foundation Cloud Service (RMFCS).
last updated by	alphanumeric, 10 positions	Set to the ADMIN user ID.
last updated	datetime	Set to the date and time when the import ran.

Importing Locations through File Storage API

Importing locations allows you to create a *location*, including the address, telephone numbers, and other related information such as the store rank and hours, based on information defined in a location import file from an external system.

What is a location? A location is a place where a product is sold or stocked. A location can be a warehouse or store where you keep actual inventory, or it can also be a virtual location such as a web storefront or a vendor. Locations are defined within an *organization* both by the *system* to which they belong and their *location type*.

Location address: It is important that the location address be accurate, since the location address is used as the ship-to address for ship-for-pickup orders.

Location relationships: See *Organization, System, and Location* for an overview of the relationships among **Order Broker** elements, including locations.

Required setup for file upload: You can use the *File Storage API*, to import locations to the location table and import location level fulfillment preferences to the preferencestable.

Create a pipe-delimited flat file named LOCATION_SYS.TXT, where SYS is the associated system code, making sure to name the file in all uppercase. Create a header row and a separate row for each location you wish to import. See *Sample Location Import File* for a sample of the data to include in the file.

Using the *File Storage API*, place the file in the OROB-IMPORTS container of the FILE_STORAGE table. The file remains in this location until you run the import; see *Location Import Steps* for processing details

Use of OCDS or Merchandising Omni Services: See *OCDS or Merchandising Omni Services Imports* for information on importing store and virtual warehouse locations through an integration with *OCDS or Merchandising Omni Services*.

> **Note:**
>
> - Creating or updating a location through this import process does not support assigning *Location Attributes* to locations.
> - You can also create locations through the LocationUpdate request messages. See the Operations Guide for more information.

For more information: See:

- *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for an overview on the import process and background information.
- *Schedule Jobs* for more information on the import schedule for an integrated *system*, or to run the import process on demand.
- the *Product Imports History* screen and the *Location Import Errors Report* for more troubleshooting information related to the location import process.

Location Import Steps

The import steps related specifically to location import through the *File Storage API*:

1. The process clears outdated records from the location_import table based on the *Days to Keep Errors* for the system. If a record is flagged with an error code, it remains in the import table until the *Days to Keep Errors* has passed and you next run an import for that system.
2. The process uses the pipe-delimited flat file named `LOCATION_SYS.TXT`, where `SYS` is the system code that matches the system code associated with the import being processed in the OROB-IMPORTS container of the FILE_STORAGE table. The name of the pipe-delimited file should be uppercase, including the system code, regardless of whether the system code is upper and lowercase in Order Broker.
3. If the process cannot move the records to the location_import table for field edits, it moves the records in error in the `LOCATION_SYS.TXT` flat file to the.OROB-ERRORS container in the FILE_STORAGE table. This can occur if, for example, the number of columns in the flat file is invalid. In this case, a general error is listed at the *Product Imports History* screen.
4. If the records in the location import file pass the initial edits, the process uses the information from the flat file to create records in the location_import table. See *Location Import Mapping* for more information on how the data in the `LOCATION_SYS.TXT` file maps to the location_import table.
5. Next, if a record in the location import file contains an error, the system updates the record in the location_import table with the error code.

   In this situation, you can run the *Location Import Errors Report* to review the list of errors in the import file. Correct the records in error in the originating system and use the file storage API to replace the file.

Note that certain errors are listed on the error report with an error code of 56 and a reason of Locations Import Failed - Other Error. This can occur when, for example, an address line is too long or a one-position flag, such as the Active flag, contains an invalid character. In these cases, a more descriptive error description is included in the error file.

6. For records in the location import file that process successfully, the system:
   - Creates and updates records in the location table. If the Active field is *Y*, the location is listed on the *Locations* screen. See *Location Import Mapping* for more information on how the data in the location_import table maps to the location table.
   - Updates all address information if any address information was included in the import file, including clearing the data in any address fields that are blank (containing a space) or empty in the import file. However, if all address fields are empty in the import file, the current address information is not replaced, and only non-address fields are updated with the data from the import file.
   - With the exception of address data, clears any fields that contain a blank space in the import file; otherwise, does not update any field that is empty in the import file.
   - Creates and updates records in the preferences table. These preference settings display at the location level on the *Fulfillment Tab* of the *Preferences* screen.
   - Deletes the location_import record.
   - If you use *proximity locator*, determines the location's latitude and longitude using either the *Oracle Maps Cloud Service* or the *proximity location table*, depending on your configuration, and saves this information as part of the location record.
7. After processing all import files:
   - The process writes a log record for each import process, displayed at the *Product Imports History* screen.
   - Based on the *Location Product Import* setting at the **Event Logging** screen, after processing all import files, the process generates an email notification indicating success (if all records were successfully imported) or failure (if any record could not be imported).

The backed up files in the FILE_STORAGE table are cleared based on the number of days specified in the Product Import Files setting in the *Retention Settings* area of the **Tenant - Admin** screen.

Invalid address? The import process creates a location record even if the address specified in the import file is incomplete or invalid. In this case, the location record is listed on the *Location Import Errors Report* with an error of 75 - The address combination is invalid. If the location is not included as expected in inventory search results or order assignments, you can use the *Edit Location* to verify or correct the address.

Update Latitude and Longitude: The import process updates the location's *Latitude* and *Longitude* when creating or updating the location. See *Proximity Locator Searching* for an overview.

Days Open not updated: The *Days Open* fields for a location are all automatically selected when the import process creates a new location, and the existing settings are not updated when the import process updates an existing location. You can update these fields at the *Edit Location* screen, or through the *Location Bulk Updates* wizard.

See *Auto-Cancel Unclaimed Orders* for background on how the *Days Open* fields control the update of the *Pickup By Date*.

Sample Location Import File

To import locations, create a pipe-delimited flat file named `LOCATION_SYS.TXT`, where `SYS` is the associated system code. The file name should be all uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase.

The following is a sample of the contents to include in the `LOCATION_SYS.TXT` pipe-delimited flat file. The first row is the header information, which is informational only, and the following row is the location data.

The file must contain the following columns, with each column separated using pipes `|`. Each column besides the *LABOR_COST* is required; an empty column can be entered as `||`.

> **Note:**
>
> When updating a location, data passed in the location import file overrides the existing data for the location. If a setting in the location import file contains a blank space (`|  |`), the system clears any value currently in the field. For example, if the existing rank for the location is `1`, and you the RANK field in the location import file contains a space, the system clears the value of 1 from the Rank field. However, the address fields are treated as a single unit, and if any address data is passed in the import file, the entire address is updated, including clearing any fields that are blank or empty in the import file.

SYSTEM_CD|LOCATION_TYPE_CD|LOCATION_CD|NAME|ADDRESS_LINE_1|
ADDRESS_LINE_2|ADDRESS_LINE_3|ADDRESS_LINE_4|AP_SUITE|CITY|
STATE_PROVINCE_CODE|POSTAL_CD|COUNTRY_CD|PHONE|EXTENSION|FAX|
LOCATION_HOURS|RANK|REGION|CONTACT_NAME|EMAIL|DELIVERY|SHIP_TO|
RETAIL_PICKUP|PICKUP|BACK_ORDER_AVAILABLE|ACTIVE|
ShipForPickup_Source_Available|ShipForPickup_Pickup_Available|LABOR_COST

7|STC|TEST2|Location Test Import2|1234 Sample St|Address line 2|Address line 3|Address line 4|250|Westborough|MA|01581|US|5085550100|9371|5085550101|9-6|4|GreaterBoston|
Firstname Lastname|flast@example.com|Y|Y|N|Y|N|Y|N|N|12.34

Location Import Mapping

The table below lists the fields in the location import flat file, the location_import table, and the location and preferences tables.

Note:

- The field names indicated below are informational. The import ignores the field names in the first row in the flat file, although it does confirm that the number of columns in the first row is consistent with the number of columns in each import record.
- See the *Edit Location* screen or the *Preferences* screen for more information on each field in context.

Field	Attributes	Description
SYSTEM_CD used to update the SYSTEM_ID in the location table	alphanumeric, 10 positions	See *system*. The system code can include special characters and must be unique in Order Broker. The system code must be a valid system for the *organization* that the import process is being run. Required. **Mapping:** The system determines the SYSTEM_ID in the location table by mapping the SYSTEM_CD in the location_import table to the SYSTEM_CD in the system table.
LOCATION_TYPE_CD used to update the LOCATION_TYPE_ID in the location table	alphanumeric, 10 positions	See *location type*. The location type code must be a valid location type code for the *organization*. Required. **Mapping:** The system determines the LOCATION_TYPE_ID in the location table by mapping the LOCATION_TYPE_CD in the location_import table to the LOCATION_TYPE_CD in the location_type table.
LOCATION_CD	alphanumeric, 10 positions	See *location*. The location code must be unique for each *organization* and *system*. If the location code does not exist, the system creates a new location; if the location code already exists, the system updates the location. Required.
NAME	alphanumeric, 40 positions	Location names do not need to be the same as the name or description of the location in the integrated system, such as Order Management System or Xstore. Required. The import process updates all address information if any address information was included in the import file, including clearing the data in any address fields that are blank or empty in the import file. However, if all address fields are empty in the import file, the current address information is not replaced, and only non-address fields are updated with the data from the import file. Address fields include address lines, apartment/suite, city, state/province, postal code, and country.

Field	Attributes	Description
ADDRESS_LINE_1, ADDRESS_LINE_2, ADDRESS_LINE_3, and ADDRESS_LINE_4	alphanumeric, 50 positions each	Optional.
AP_SUITE named APT_OR_SUITE in the location table	alphanumeric, 20 positions	Optional.
CITY	alphanumeric, 35 positions	Optional.
STATE/ PROVINCE_CODE	alphanumeric, 3 positions	Required if you use the *proximity locator*. Should be a valid ISO code.
POSTAL_CD	alphanumeric, 10 positions	The ZIP or postal code for the location. Required if you use the *proximity locator*. **Note:** To prevent issues with proximity calculation or errors upon import, Canadian postal codes should be imported as a six-position code plus an embedded space. For example, the correct format is Y1A 1A3 rather than Y1A1A3.
COUNTRY_CD	alphanumeric, 3 positions	Required if you use the *proximity locator*; in this situation, the country code must exist in the proximity table. Should be a valid ISO code. **Note:** The import process creates a location record even if the address specified in the import file is incomplete or invalid. If the location is not included as expected in inventory search results or order assignments, you can use the *Edit Location* to verify or correct the address.
PHONE	alphanumeric, 20 positions	Optional.
EXTENSION	alphanumeric, 10 positions	Optional.
FAX	alphanumeric, 20 positions	Optional.
LOCATION_HOURS	alphanumeric, 60 positions	Optional.
RANK	alphanumeric, 10 positions	Optional.
REGION	alphanumeric, 20 positions	Optional.
CONTACT_NAME	alphanumeric, 50 positions	Optional.

Field	Attributes	Description
EMAIL	alphanumeric, 255 positions	The email address must be formatted as user@host.com (or other valid suffix such as .org). Order Broker does not validate that your entry represents an existing email address. Separate multiple email addresses with a semicolon (;). The following location level preferences in the location import file map to the PREFERENCES table. If any of the preferences are set to anything other than Y, N, or blank, the upload will be in error, with an error message such as the following indicated in the error file: `'Q' is invalid for Column 'SHIPFORPICKUP_SOURCE_AVAILABLE', expected Y or N.` These records are not listed on the *Location Import Errors Report*.
DELIVERY	alphanumeric, 1 position	Indicates to the Routing Engine whether a location is eligible to fulfill an order whose fulfillment type is *DELIVERY*. See *Delivery Order* for a discussion. Updates the location level *Delivery Available* field on the *Fulfillment Tab* of the *Preferences* screen: • If the import value was *Y*, the preference is *Yes*. • If the import value was *N*, the preference is *No*. • If the import value was blank, the preference is *Not Defined*. **Mapping:** The system determines the location level Delivery Available setting on the *Fulfillment* tab of the **Preferences** screen by mapping DELIVERY in the location_import table to the PREFERENCE_VALUE for PREFERENCE_TYPE_ID 114 (Delivery Available) and LEVEL_ID 30 (location level) in the PREFERENCES table.
SHIP_TO	alphanumeric, 1 position	Not currently implemented.
RETAIL_PICKUP	alphanumeric, 1 position	Not currently implemented.

Field	Attributes	Description
PICKUP	alphanumeric, 1 position	Indicates to the Routing Engine whether a location is eligible to fulfill an order whose fulfillment type is *PICKUP*. See Pickup Order for a discussion. Updates the location level Pickup Available field on the Fulfillment Tab of the Preferences screen: • If the import value was *Y*, the preference is *Yes*. • If the import value was *N*, the preference is *No*. • If the import value was blank, the preference is *Not Defined*. **Mapping:** The system determines the location level Pickup Available setting on the *Fulfillment* tab of the **Preferences** screen by mapping PICKUP in the location_import table to the PREFERENCE_VALUE for PREFERENCE_TYPE_ID 113 (pickup available) and LEVEL_ID 30 (location level) in the preferences table.
BACK_ORDER_AVAILABLE	alphanumeric, 1 position	Indicates whether a location can be assigned a delivery order even if it does not currently have sufficient inventory on-hand. Enter *Y* to have the location eligible to fulfill a delivery order even if it does not currently have the requested quantity of each item on-hand, or enter *N* or leave blank if you do not want the location selected unless it currently has the full quantity of each item on-hand. **Note:** Do not set this field to *Y* for the default unfulfillable location. Listed in the location level Backorder Available field on the Fulfillment Tab of the Preferences screen: • If the import value was *Y*, the preference is *Yes*. • If the import value was *N*, the preference is *No*. • If the import value was blank, the preference is *Not Defined*. **Mapping:** The system determines the location level Backorder Available setting on the *Fulfillment* tab of the **Preferences** screen by mapping BACK_ORDER_AVAILABLE in the location_import table to the PREFERENCE_VALUE for PREFERENCE_TYPE_ID 128 (backorder available) and LEVEL_ID 30 (location level) in the preferences table.
ACTIVE	alphanumeric, 1 position	Enter *Y* to indicate the location is active. Informational only.

Field	Attributes	Description
ShipForPickup_ Source_Available	alphanumeric, 1 position	Indicates to the Routing Engine whether a location is eligible to source an order whose fulfillment type is *SHIPFORPICKUP*. See *Ship For Pickup Order* for a discussion. Updates the location level *Ship For Pickup Sourcing Available* field on the *Fulfillment Tab* of the *Preferences* screen: • If the import value was *Y*, the preference is *Yes*. • If the import value was *N*, the preference is *No*. • If the import value was blank, the preference is *Not Defined*. **Mapping:** The system determines the location level Ship For Pickup Sourcing Available setting on the *Fulfillment* tab of the **Preferences** screen by mapping SHIPFORPICKUP_SOURCE_AVAIL in the location_import table to the PREFERENCE_VALUE for PREFERENCE_TYPE_ID 140 (sourcing available) and LEVEL_ID 30 (location level) in the preferences table.
ShipForPickup_ Pickup_Available	alphanumeric, 1 position	Indicates to the Routing Engine whether a location is eligible to have the customer pick up an order whose fulfillment type is *SHIPFORPICKUP*. See *Ship For Pickup Order* for a discussion. Updates the location level *Ship For Pickup Receiving/Pickup Available* field on the *Fulfillment Tab* of the *Preferences* screen: • If the import value was *Y*, the preference is *Yes*. • If the import value was *N*, the preference is *No*. • If the import value was blank, the preference is *Not Defined*. **Mapping:** The system determines the location level Ship For Pickup Receiving / Pickup Available setting on the *Fulfillment* tab of the **Preferences** screen by mapping SHIPFORPICKUP_PICKUP_AVAIL in the location_import table to the PREFERENCE_VALUE for PREFERENCE_TYPE_ID 139 (receiving/pickup available) and LEVEL_ID 30 (location level) in the preferences table.

Field	Attributes	Description
LABOR_COST	numeric, 19.4	Used to "shop" an order for fulfillment or sourcing as part of the *LocateItems Sequence and Splitting Examples (Standard Brokering)* method when determining the cost to pick, pack, and ship an order. It can be 0, but cannot be a negative number, and should not include a currency symbol. Should not exceed the specified length, or the upload record will be in error. This error is not listed on the Location Import Errors report. Optional. **Note:** This column can be omitted entirely, instead of just leaving it blank; however, to omit the labor cost column, you must not only omit the column for each record, but also omit the column from the file headers. If no labor cost column is included for the location records, but the LABOR_COST is included in the file headers, the record is in error: `Invalid number of import columns, 29 passed`. This error is not listed on the Location Import Errors report. You can also update the labor cost through the *Location Bulk Updates* wizard.

Importing Products, System Products, and Item Image URLs through File Storage API

Purpose: Use the *Schedule Jobs* screen to import locations, products and system products, product locations, item image URLs, and UPC barcodes. This help topic describes the fields you can map and update for products, system products, and item image URLs.

> **Note:**
>
> This help topic does not address importing product data from OCDS or Merchandising Omni Services. See *OCDS or Merchandising Omni Services Imports* for more information.

Required setup: To import products and system products to the *product* and *system_product* tables, create a pipe-delimited flat file named PRODUCT_SYS.TXT, where SYS is the associated system code, making sure to name the file in all uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase. Create a separate row for each product or system product. See *Sample Product Import File* for a sample of the data to include in the file.

The process looks for the file in the OROB-IMPORTS container of the FILE_STORAGE table. The file remains in this location until you run the import, as described below.

- Oracle recommends that you do not use UPC codes as system product codes, because UPCs are not permanently assigned to a single product.

- Creating or updating a product through this import process does not support assigning *Product Attributes* to products.
- You can also create products through the ProductUpdate request messages. See the Operations Guide for more information.

For more information: See:

- *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for an overview on the import process and background information.
- *Product Import* for more information on setting up the product import schedule for a system, or to run the import process on demand.
- the *Product Imports History* screen and the *Product Import Errors Report* for more troubleshooting information related to the product and system product import process.

Product and System Product Import Steps

The import steps related specifically to product and system product import:

1. The process clears outdated records from the product_importtable based on the *Days to Keep Errors* for the system. If a record is flagged with an error code, it remains in the import table until the *Days to Keep Errors* has passed and you next run an import for that system.
2. The process uses the pipe-delimited flat file named `PRODUCT_SYS.TXT`, where `SYS` is the system code, that is in the OROB-IMPORTS container of the FILE_STORAGE table. The name of the pipe-delimited file should be uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase.

   Job Batch Size: The *Job Batch Size* controls the number of records to process in each batch.
3. If the process cannot move the records to the product_import table for field edits, it moves the records in error in the `PRODUCT_SYS.TXT` flat file to the OROB-ERRORS container of the FILE_STORAGE table, adding a date and time stamp to the name of the file, such as `PRODUCT_SYS.TXT.20150628.153000.err`. This can occur if, for example, there are an invalid number of columns in the flat file, a numeric field contains alphabetical data, a date is not formatted correctly, or the length of a field exceeds the maximum length in the database. In this case, a general error is listed at the *Product Imports History* screen, and no errors are listed on the *Product Import Errors Report*.
4. If the records in the file pass the initial edits, the process uses the information from the flat file to create records in the product_import table. See *Product Import Mapping* for more information on how the data in the `PRODUCT_SYS.TXT` file maps to the product_import table.
5. Next, if there is an error based on the required data for product and system product records, the process updates the record in the product_importtable with the error code.

   In this situation, you can run the *Product Import Errors Report* to review the list of errors in the import file. Correct the records in error in the originating system and use the file storage API to replace the file.

6. If there are no errors for a product_import record, the process creates or updates the related product record (if the import is for the default system) and system product record and the product_import record is deleted.
7. After processing all import files:
   - The process writes a log record for each import process, displayed at the *Product Imports History* screen.
   - Based on the *Location Product Import* setting at the **Event Logging** screen, after processing all import files, the process generates an email notification indicating success (if all records were successfully imported) or failure (if any record could not be imported)

The backed up files in the archive and error containers in the FILE_STORAGE table are cleared based on the number of days specified in the Product Import Files setting in the *Retention Settings* area of the **Tenant - Admin** screen.

Sample Product Import File

To import products or system products, create a pipe-delimited flat file named `PRODUCT_SYS.TXT`, where `SYS` is the associated system code. The file name should be all uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase.

The file must contain the following columns, each column separated using pipes `|`. Each column is required; a blank column can be entered as `| |`.

The following is a sample of the contents to include in the `PRODUCT_SYS.TXT` pipe-delimited flat file. The first row is the header information, which is informational only, and the following row is the product and system product data.

system_cd|department|class|sub_class|system_product|product_cd|product_description|master_style|image_URL

6|DEPARTMENT|CLASS|CATEGORY|PRODUCT|SYSTEM_PRODUCT|Product Description|Master Style|https://www.example.com/images/sample.png

The import ignores the first row in the file.

Product Import Mapping

The table below lists the fields in the product import flat file, the product_import table, and the product and product_location tables.

> **Note:**
>
> The flat file field names indicated below are informational. The import ignores the first row in the flat file.

Field	Attributes	Description
system_cd	alphanumeric, 10 positions	See *system*. The system code can be 1 to 10 positions in length, can include special characters, and must be unique in Order Broker. The system code must be a valid system for the *organization* that the import process is being run, but does not need to be the same as the system running the import. Required.
department	alphanumeric, 40 positions	The description of the product's department. Order Broker updates this field for the product only if it is passed from the *default system*. Informational only. Can be set to a blank. **Order Management System integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU’s Long SKU Department. Long SKU departments are used to identify items within a retail hierarchy.
class	alphanumeric, 40 positions	The description of the product's class. Order Broker updates this field for the product only if it is passed from the *default system*. Informational only. Can be set to a blank. **Order Management System integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU’s Long SKU Class. Taken from the base item rather than the SKU if this is a SKU’d item. Long SKU classes can be used together with long SKU departments to identify items within a retail hierarchy.

Field	Attributes	Description
sub_class	alphanumeric, 40 positions	The description of the product's category. Order Broker updates this field for the product only if it is passed from the *default system*. Informational only. Can be set to a blank. **Order Management System 18.2 or earlier integration:** If your *default system* is an Order Management System company, this field is the description of the item/SKU's Long SKU Division. Long SKU divisions can be used together with long SKU departments and classes to identify items within a retail hierarchy. **Order Management System 18.3 or later:** If your *default system* is an Order Management System, this field is either: • The description of the item/SKU's Long SKU Division, if the OROB Item Category Value (M54) system control value is set to LSDIVISION or blank. Long SKU divisions can be used together with long SKU departments and classes to identify items within a retail hierarchy. • The item category code, if the OROB Item Category Value (M54) system control value is set to CATEGORY.
system_product_cd	alphanumeric, 35 positions	The *system product* code identifying the product in the external system. The system product code might differ from the *product* code if the external system is not the *default system* for the organization. If the system product code is already assigned to a different product in the system, there is no error, but the duplicate system product is not created. Required. **Note:** Oracle recommends that you do not use UPC codes as system product codes, because UPCs are not permanently assigned to a single product.
product_cd	alphanumeric, 35 positions	The *product* code identifying the item in the *default system*. If the load record is creating or updating a system product, the product_cd must be a valid product in Order Broker. There can be only one entry for the same product code in the import file. Required. **Note:** The import process does not flag the product as an error if the product code includes an invalid character, such as the ^ symbol; however, such special characters are not valid as part of the product code in Order Broker and can subsequently cause errors during standard processing.

Field	Attributes	Description
product_description	alphanumeric, 40 positions	The *Name* of a product. Order Broker updates this field for the product only if it is passed from the *default system*. Required.
master_style_cd	alphanumeric, 35 positions	See *master style*. Optional field. Order Broker updates this field for the product only if it passed from the *default system*. Informational only. Can be set to a blank. **Note:** Normally, you would never change the master style for a product in Order Broker.
image_url	alphanumeric, 255 positions	Updates the *Image URL* for the product, indicating where to find the product image to display in Store Connect, when passed for the product in the default system. Optional field. Must be a validly formatted URL, such as `https://www.example.com/folder/image.png`, where: • `http` or `https` is the protocol • `www.example.com` is the domain or server name • `folder` is a folder or subfolder where the image is found • `image.png` or `image.jpg` is the name of the image Must not exceed 255 positions. If there was already an item image URL specified for the product, it is overwritten. If an item image URL was previously specified and a blank is passed in the import file, the item image URL is cleared. The import does not validate that an image is found at the specified URL.

Importing Product Locations through File Storage API

Purpose: Use the *Schedule Jobs* screen to import locations, products and system products, product locations, and UPC barcodes. This help topic describes the fields you can map and update for product locations, including product location attributes.

> **Note:**
>
> This help topic does not address importing product location data from OCDS or Merchandising Omni Services or individual inventory updates through the RIB. See *OCDS or Merchandising Omni Services Imports* or *Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)* for more information. However, *Product Location Import Error Files*, below, does provide information on possible product location import errors, including errors that occur through the import of store or warehouse inventory through OCDS or Merchandising Omni Services.

Required setup: To import product locations to the product_location table:

- Create a pipe-delimited flat file that includes a separate row for each product location. See *Sample Product Location Import File* for a sample of the data to include in the file.
- The file should be named PRODUCT_LOCATION_SYS_NNNNN.TXT, where SYS is the associated system code and NNNNN is an optional series of characters, such as a date/time stamp, a location code, or both. The file name should be all uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase. See the *Product Location Import Steps* for a discussion.
- The process looks in the OROB-IMPORTS container of the FILE_STORAGE table. The file remains in this location until you run the import, as described below.

> **Note:**
>
> You can also create product locations through the ProductUpdate request messages. See the Operations Guide for more information.

For more information: See:

- *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for an overview on the import process and background information.
- *Days to Keep Errors* for more information on setting up the import schedule for a system, or to run the import process on demand.
- the *Product Imports History* screen for more troubleshooting information related to the import process.

Product Location Import Steps

Use the *Product Import* option to import product, system product, bar code, and location data from pipe-delimited files. The import steps related specifically to product location import:

1. The process uses the pipe-delimited flat file. The file should be named PRODUCT_LOCATION_SYSNNNNN.TXT, where:
   - SYS is the associated system code. The system code here should match the case for the code in your organization.
   - NNNNN is an optional suffix, which can include information such as a date/time stamp or a location code. The use of a date/time stamp can be useful if the integrating inventory system generates update files multiple times in a day.

   Multiple file processing:

   - If you include an optional suffix in the file name and there is more than one product location file in the FILE_STORAGE table, the files are processed in alphanumeric order. For example, if there are files named PRODUCT_LOCATION_INV_123_20161231010101.TXT and PRODUCT_LOCATION_INV_123_20161231040101.TXT, the PRODUCT_LOCATION_INV_123_20161231010101.TXT file is processed first.
   - If one file has an optional suffix and one does not, the file without the suffix is processed first.
   - Numeric suffixes are sorted before alphabetical suffixes. For example, a suffix that starts with 123 is processed before a suffix that starts with DC.

- f a product location is included in more than one import file, the product location is overwritten. For example, a product location is in two files, and the first file has an available quantity of 100, while the next file processed has an available quantity of 98. After processing both files, the available quantity is set to 98.

File name matching:

The file name should be all uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase.

The import file(s) must be in the OROB-IMPORTS container of the FILE_STORAGE table.
Job Batch Size: The *Job Batch Size* controls the number of records to process in each batch.

2. If there are any errors in the file that prevent the process from moving each record to the product_location table, it moves the records in error in the import file to the OROB-ERRORS container in the file storage table, adding a date and time stamp to the name of the file, such as `PRODUCT_LOCATION_SYS.TXT.20161028.153000.bak`. See *Product Location Import Error Files*, below, for more information.
3. If there are no errors for an import record, the process updates the record in the product_location table.

> **Note:**
>
> The import process ignores any files that do not conform to the file naming convention or do not match the system running the import. It does not report an error if no matching files are found in the FILE_STORAGE table.

4. After processing all import files:
   - The process writes a log record for each import process, displayed at the *Product Imports History* screen.
   - Based on the *Location Product Import* setting at the **Event Logging** screen, after processing all import files, the process generates an email notification indicating success (if all records were successfully imported) or failure (if any record could not be imported).

The backed up files are cleared based on the number of days specified in the Product Import Files setting in the *Retention Settings* area of the **Tenant - Admin** screen.

For more information: See *Product Location Import Error Files*, below, for information on possible errors.

Sample Product Location Import File

The following is a sample of the contents to include in the product location pipe-delimited flat file. The first row is the header information, and the following row is the product location data.

system_cd|location_cd|product_cd|available_qty|next_po_qty|next_po_date|daily_sell_through_qty|sell_qty_multiple|minimum_sell_qty|shrink_rate|sales_velocity|status|clearance|selling_price|cost cwdDoc|10|cumin|100|1|2015-08-27|1|2||4|5|A|Y|19.99|2.3456

The import does not attempt to process the first row in the file; however, the number of columns in the header row is used to validate the number of columns, including empty columns, in each of the import records in the file. The total number of columns in the header row needs to match the number of columns for each record.

Product Location Import Mapping

The table below lists the fields in the product location import flat file and the product_location table.

Availability information and attributes: For an existing product location, the import can update either the availability information (available quantity, next PO quantity, and next PO date), any or all of the attributes, or both.

To create a new product location, the availability information is required.

> **Note:**
>
> - The field names indicated below are informational. The import ignores the field names in the first row in the flat file, although it does confirm that the number of columns in the first row is consistent with the number of columns in each import record.
> - If any optional fields in the import file are left blank--that is, the file includes the pipe delimiters without a space or zero between them--the import does not update these fields.

Field	Attributes	Description
system_cd	alphanumeric, 10 positions	See *system*. The system code can be 1 to 10 positions in length, can include special characters, and must be unique in Order Broker. The system code must be a valid system for the *organization* where the import process is being run, but does not need to be the same as the system running the import. Required.
location_cd	alphanumeric, 10 positions	The *location* where the product is stocked in the external system. Required.
product_cd	alphanumeric, 35 positions	The *product* code identifying the item in the *default system*. If the load record is creating or updating a system product, the product_cd must be a valid product in Order Broker. Required.

Field	Attributes	Description
available_qty	numeric, 6 positions	The current quantity of the product available to sell in this location as of the time of the import process. Used to calculate the *available to promise quantity*. A negative quantity, preceded by a minus sign (-), indicates that the item is backordered. If the quantity passed includes a decimal, it is truncated; for example, if a quantity if 5.75 is passed, the available quantity is set to 5. **Note:** If no available quantity is passed: • The next PO quantity and next PO date are not updated. However, if the available quantity specified is 0 or negative, the PO information is updated. • The product location attributes are still updated if the product location already exists; however, the import does not create a new product location. Optional, but can be set to 0.
next_po_qty	numeric, 6 positions	The quantity ordered for this product on the next purchase order for this location. Not updated if no available quantity is passed. If the quantity passed includes a decimal, it is truncated; for example, if a quantity if 5.75 is passed, the available quantity is set to 5. Optional, but required if the available quantity is passed.
next_po_date	datetime	The next date when a purchase order for this product is expected for delivery in this location. YYYY-MM-DD format. If no time is specified in the file, a time of 12:00:00 AM is appended. Can be blank, even if there is a next_po_qty. Not updated if no next PO quantity is passed. **Note:** The next PO date is cleared if no date is passed in the import file, but the next PO quantity is passed.

Field	Attributes	Description
		Note: If the availability fields are valid but there is an error related to one of the attributes, the product location is created or updated with the availability information. **Attributes:** The following product attributes are available to guide selection of fulfilling or sourcing locations for orders: • probability rules: See the *Probability Rule Wizard* for more information • *standard brokering*: optionally, the Routing Engine can use the Sales Velocity for ranking • *weighted brokering*: the Science Engine can use various product location attributes based on the configured weighted brokering percentages Each of the product attributes are user-defined.
daily_sell_through_qty	numeric, up to 6 positions	The *Daily Sell Through Quantity*. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number. Optional.
sell_qty_multiple	numeric, up to 6 positions	The *Sell Quantity/Multiple*. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number. Optional.
minimum_sell_qty	numeric, up to 6 positions	The *Minimum Sell Quantity*. This quantity can be up to 6 positions, and must be a whole number. It cannot be a negative number. Optional.
shrink_rate	numeric, up to 3 positions	The *Shrink Rate %*. This percentage can be up to 3 positions, and must be a whole number from 0 to 100. It cannot be a negative number. Optional.
sales_velocity	numeric, 2 positions with an optional 2-place decimal	The *Sales Velocity*. Can be blank, or any number from 0 to 99.99. It cannot be a negative number. Optional.

Field	Attributes	Description
		The following columns can each be omitted entirely, instead of just leaving them blank (for example, ||); however, you must not only omit the column for all records in the import file, but also omit the column from the file headers. If the number of columns included for a product location record is different from the number of columns in the file headers, the record is in error, for example: `Invalid number of import columns, 14 passed.` *Example:* • A record with all fields included, with some optional fields blank: OBRDoc|10|cumin|100|1|2015-08-27|1|2||||A|Y|19.99|2.3456 • A record with the status, clearance, selling_price, and cost omitted entirely, and also some optional fields blank: OBRDoc|10|cumin|100|1|2015-08-27|1|2||||
status	alphanumeric, 1 position	The status of the product in this location. Optional. Informational only. Possible statuses are: • *A* or blank = Active (default). The product can be ordered. If the status in the import file is blank, this field is set to *A* for a new product location, and the Status for an existing product location is not updated. • *I* = Inactive. Cannot currently be ordered. • *C* = Discontinued. Can still be ordered, but will be inactive at some point in the future.
clearance	alphanumeric, 1 position	Indicates whether the product is on clearance in this location. Optional. Possible settings are: • *Y* = The product is on clearance. • *N* or blank (default) = The product is not on clearance. If the status in the import file is blank, this field is set to N for a new product location, and the On Clearance setting for an existing product location is not updated. Used in *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation. If you use *LocateItems Sequence and Splitting Examples (Standard Brokering)* and this flag is selected, the Science Engine uses a selling price of .01 to calculate margin.
selling_price	numeric, 19 positions with a 4-place decimal	The single-unit selling price of the product in this location. Can be up to 19 positions with a 4-position decimal. It can also be 0, but cannot be a negative number, and should not include a currency symbol. Optional, but should be specified if Gross Margin is used in the *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation.

Field	Attributes	Description
cost	numeric, 19 positions with a 4-place decimal	The single-unit cost of the product in this location. Optional. It can be 0, but cannot be blank or a negative number, cannot exceed the specified field length, and should not include a currency symbol. The single-unit cost of the product in this location. Optional, but should be specified if Gross Margin is used in the *LocateItems Sequence and Splitting Examples (Standard Brokering)* calculation.

Product Location Import Error Files

Each submitted product location record that is in error is included in a file n the OROB-ERRORS container of the FILE_STORAGE table.

The file name is PRODUCT_LOCATION_SYS.TXT.20161016.160011.bak, where PRODUCT_LOCATION_SYS.TXT is the name of the original import file, and 20161016.160011 are the date and time for the import, in YYYYMMDD.HHMMSS format.

How errors are indicated in the error file: The error file is in the same format as the product location import file, except that for each record included in the file, there is an additional column entitled `error_column`. This column indicates the column that contained an error that prevented the record from processing. For example, if the product code for an import record was invalid, the `error_column` indicates `product_cd`. The header row is included if the error is not related to the number of columns.

1. The error file does not indicate the nature of the problem with a particular field. For example, if the `error_column` indicates `selling_price`, it does not indicate whether the selling price was invalid because it included too many positions or a non-numeric character.
2. If one or more required columns are missing for a record, the error resembles `Invalid number of import columns, 10 passed.` In this situation, the header row is not included in the error file.
3. If there were no records in the import file, the `error_column` indicates `Import file has no lines to import.`

OCDS or Merchandising Omni Services imports: If any errors occur through the import of warehouse or store inventory through *OCDS or Merchandising Omni Services Imports*, an error file is also created in the OROB-ERRORS folder of the file storage table, as described above. In this case, the file name includes the OCDS prefix (for example, OCDS_PRODUCT_LOCATION_SYS.TXT) and the only errors that might be included in the error file are those related to location code, product code, or available quantity. The OCDS or Merchandising Omni Services import does not update all available fields in the product location table, and there are no possible errors related to the system code, because the code used is from the system you selected when running or scheduling the import at the Schedule Jobs screen.

Importing UPC Barcodes through File Storage API

Importing UPC barcodes allows you to create UPC-A or EAN-13 barcodes for products.

What is a UPC barcode? A UPC barcode is an identification of a product by either a UPC-A or EAN-13 code.

Used how? You can use UPC barcodes in Store Connect to scan picked items on orders. See the *Store Connect Preferences* screen for more information.

See the *UPC* screen for more information.

Required setup: Create a pipe-delimited flat file named PRODUCT_BARCODE_SYS.TXT, where SYS is the associated system code. The file name should be all uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase. Create a separate row for each product location. See *Sample Barcode Import File* for a sample of the data to include in the file.

The process looks in the OROB-IMPORTS container of the FILE_STORAGE table. The file remains in this location until you run the import, as described below.

In this topic:

- *Barcode Import Steps*
- *Sample Barcode Import File*
- *Product Barcode Import Mapping*

For more information: See:

- *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* for an overview on the import process and background information.
- *Product Import* for more information on setting up the product import schedule for a system, or to run the import process on demand.
- the *Product Imports History* screen and the *Product Barcode Import Errors Report* for more troubleshooting information related to the product UPC barcode import process.

Barcode Import Steps

The steps to import barcodes are:

1. The process clears outdated records from the product_barcode_import table based on the *Days to Keep Errors* for the system. If a record is flagged with an error code, it remains in the import table until the *Days to Keep Errors* has passed and you next run an import for that system.
2. The process uses the pipe-delimited flat file named `PRODUCT_BARCODE_SYS.TXT`, where SYS is the system code in the OROB-IMPORTS container of the FILE_STORAGE table. The file name should be all uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase.
3. If the records in the file pass the initial edits, the process uses the information from the flat file to create records in the product_barcode_import table. See *Product Barcode Import Mapping* for more information on how the data in the `PRODUCT_BARCODE_SYS.TXT` file maps to the product_barcode_import table.
4. Next, if there is an error based on the required data for product barcode records, the process updates the record in the product_barcode_import table with the error code.

   In this situation, you can run the *Product Barcode Import Errors Report* to review the list of errors in the import file. Correct the records in error in the originating system and use the file storage API to replace the file.

5. If there are no errors for a product_barcode_import record, the process updates the product_barcode table and the product_barcode_import record is deleted. The import process does not update existing barcode records. See *Product Barcode Import Mapping* for information on how the information from the file maps to the product_barcode table.
6. After processing all import files:
   - The process writes a log record for each import process, displayed at the *Product Imports History* screen.
   - Based on the *Location Product Import* setting at the **Event Logging** screen, after processing all import files, the process generates an email notification indicating success (if all records were successfully imported) or failure (if any record could not be imported).

The backed up files in the archive and error containers are cleared based on the number of days specified in the Product Import Files setting in the *Retention Settings* area of the **Tenant - Admin** screen.

Sample Barcode Import File

To import product barcodes, create a pipe-delimited flat file named `PRODUCT_BARCODE_SYS.TXT`, where `SYS` is the associated system code. The file name should be all uppercase, including the system code, even if the system code is set up in Order Broker as upper and lowercase.

The following is a sample of the contents to include in the `PRODUCT_BARCODE_SYS.TXT` pipe-delimited flat file. The first row is the header information, which is informational only, and the following row is the product barcode data.

System_CD|System_Product|Barcode|Barcode_type

12|AB12345|123456789012|UPC-A

12|CD45678|456789012345|EAN-13

The import ignores the first row in the file.

Product Barcode Import Mapping

The table below lists the fields in the product barcode import flat file, the product_barcode_import table, and the product_barcode table.

> **Note:**
>
> The field names indicated below are informational. The import ignores the first row in the flat file.

Field	Attributes	Description
system_cd	alphanumeric, 10 positions	See *system*. Identifies the organization where the product UPC barcode should be created, and the system where the system product exists. The system code can be 1 to 10 positions in length, can include special characters, and must be unique in Order Broker. The system code must be a valid system for the *organization* where the import process is being run, but does not need to be the same as the system running the import. Required.
system_product	alphanumeric, 35 positions	The *system product* code identifying the product in the external system. Must be valid in the system code specified. The system product code might differ from the *product* code if the external system is not the *default system* for the organization. Required.
barcode	alphanumeric, 40 positions	The UPC-A or EAN-13 barcode identifying the product. A barcode can be assigned to just one product in an organization, but each product can have multiple UPC-A and EAN-13 barcodes. If the barcode specified was previously assigned to a different system product, it is reassigned to the system_product indicated in the file.
barcode_type	alphanumeric, 7 positions	Valid types are *UPC-A* and *EAN-13*.

Event Logging

Purpose: Oracle staff use the **Event Logging** screen to configure the logging to take place for Order Broker.

Logging options: Oracle staff can configure Order Broker to write logs for:

- *Order Broker modules:*
  - errors only
  - deletions only (deletion logging is available only for the user interface)
  - detailed: all events are logged
  - nothing
- *Integrated Message Logging:*
  - errors only
  - all messages
  - nothing

All personally identifiable information for customers, vendors, or locations is removed from logs. Personally identifiable information includes names, address, email addresses, phone numbers, customer numbers, and tender accounts.

The personally identifiable information is replaced in the log with the text `*** Removed by Logger ***`. For example, the email address might appear in the logs as `<email>*** Removed by Logger ***</email>`.

Email notifications: Oracle staff can also use the **Event Logging** screen to specify the events that should trigger an email notification to the *admin user*; the individual user who performed the action, such as an upload; both the admin user and the individual user; or not to trigger an email, as well as to configure the language to use for these emails.

> **Note:**
>
> See the *System* screen for information on specifying the email address to receive the *Order Broker Polling Status Email*.

Additional Logging Setup

Log retention days: The Server Logs setting in the *Retention Settings* section of the *Tenant* screen controls how many days to retain log entries until they are eligible for deletion through a scheduled process.

How to display this screen: Select *Event Logging* from the *Home Screen* or from the *Systems Menu*.

> **Note:**
>
> Only users with *Event Logging* authority can display this screen. See the *Role Wizard* for more information.

Field	Description
Event Logging	**Important:** See *Additional Logging Setup*, above, for information on additional required setup that controls the level of detail in the logs and whether to log activity.
Probability Rules	Controls the logging to take place when applying probability rules to locate items requests and other activities that require evaluation of availability in a product location. Possible settings: • *Errors only:* log an error if probability rule evaluation results in an error. Default setting. • *Nothing:* do not log probability rule activity. Detailed logging is not supported for probability rules. See *Probability Rule Overview* for background.

Field	Description
Location Product Import	Controls the logging to take place when importing product and inventory information from an external system, including the incremental import program. Possible settings are: • *Detailed:* log errors and write other updates when importing information. • *Errors only:* log activity only when an error occurs during imports.Default setting. • *Nothing:* do not log activity based on product or product location imports or the incremental import. See *Schedule Jobs* and the *Incremental Inventory Import* for background.
User Interface	Controls the logging to take place for activity in the Order Broker user interface. If this field is set to: • *Detailed:* Creation, update, and deletion of records are logged. • *Deletions:* Deletions only are logged. • *Errors Only:* Errors only are logged. Default setting. • *Nothing:* No screen activity is logged.
Trace Shopping Logic	Controls whether to track why individual locations are filtered when the Routing Engine selects a location to source an order. If this field is set to: • *Detailed:* The reasons why the Routing Engine filters individual locations from sourcing an order are tracked, and available for review at the *Trace Shopping Log* screen. • *Nothing:* Shopping logic is not traced. Oracle recommends that shopping logic tracing be enabled only when needed to research shopping logic questions, and otherwise tracing is turned off in order to avoid impairing performance. **For more information:** See the *Trace Shopping Log* screen.
Integrated Message Logging	All personally identifiable information for customers, vendors, or locations is removed from logs. Personally identifiable information includes names, address, email addresses, phone numbers, customer numbers, and tender accounts. The personally identifiable information is replaced in the log with the text `*** Removed by Logger ***`. For example, the email address might appear in the log as `<email>*** Removed by Logger ***</email>`.

Order Broker Request/Response	Controls the logging that is related to the Routing Engine request and response messages, including geocode requests and responses if you use the Oracle Maps Cloud Service (see *Proximity Locator Searching* for background). Set this option to:
	• *Everything:*
	  – Log XML messages and JSON messages, including the ProductUpdate, LocationUpdate, and LocationDetail messages and interactive inventory request messages. The availability service request messages are generated only when the Connection Type at the *System* screen is set to *URL*.
	  – Log incorrectly formed XML messages.
	• *Errors Only:* log incorrectly formed XML messages and incorrect JSON messages. Default setting.
	• *Nothing:* do not log any activity based on Routing Engine requests and responses.

Field	Description
Drop Ship Request/ Response	Controls the logging that is related to the *Supplier Direct Fulfillment* request and response XML messages. Set this option to: • *Everything:* log all messages, including log incorrectly formed XML messages. • *Errors Only:* log formed XML messages. Default setting. • *Nothing:* do not log activity.
Vendor Portal Request/Response	Controls the logging that is related to communication between Order Broker and an *integrated vendor* that use JSON messages. Set this option to: • *Everything:* log JSON messages (*getDSOrders*, *getDSShipConfirm*, and *setDSAcknowledge* request and response messages, including incorrectly formed JSON messages. • *Errors Only:* log incorrectly formed JSON messages. Default setting. • *Nothing:* do not log activity for *integrated vendor* messages.
Integrated Shipping Request/Response	Controls the logging that is related to the integrated shipping option in the Vendor Portal and Store Connect. Set this option to: • *Everything:* log messages between Order Broker and the integrated shipping provider. • *Errors Only:* log incorrectly formed messages. Default setting. • *Nothing:* do not log messages between Order Broker and the integrated shipping provider.
Inventory Request/ Response	Controls the logging that is related to the *availability update request* and response, and the inventory request and response between Order Broker and SIM or EICS. Set this option to: • *Everything:* log availability update request and response messages, and any errors such as an invalid request message. • *Errors Only:* log incorrectly formed messages. Default setting. • *Nothing:* do not log availability update request and response messages.
Email Notifications	
Language	Controls the language to use for proximity uploads notifications. **Supported languages:** Only the following languages are currently available: • Brazil-Portuguese • China-Chinese (simplified) • France-French • Germany-German • Italy-Italian • Japan-Japanese (Gregorian calendar) • Netherlands-Dutch • Russia-Russian • Spain-Spanish • Sweden-Swedish • United States-English (default) • The selected language applies only to the *Proximity Upload Status Email* generated through the *Proximity Uploads* screen. The *Incremental Inventory Import Status Email*, *Product Import Status Email*, and *Order Broker Polling Status Email* use the language specified for the organization; see the *Organizations* screen. Emails generated to customers or vendors are in English. • Your selection applies immediately after you select *Save*.

Field	Description
Proximity Data Load	Controls the generation of email notifications when you upload proximity data through the *Proximity Uploads* screen. Possible settings: • *Administrator:* generate an email notification to the *Administrative email*. • *User only:* generate an email notification to the email specified at the *User Profiles* screen for the user who submitted the upload. • *Admin and User:* generate email notifications to the email specified at the for the user who submitted the upload and to the *Administrative email*. • *Nothing:* do not generate an email. Default setting. See *Proximity Upload Status Email* for more information.
Location Product Import	Controls the generation of email notifications when importing product, system product, product barcode, location, and product location information from an external system. Possible settings: • *Administrator:* generate an email notification to the *Administrative email*. Default setting. • *Nothing:* do not generate an email. See the *Product Import Status Email* for more information.
User Interface	Controls the email generation of email notifications for activity that takes place using the Order Broker user interface. Additional information will be provided by Oracle at a later date.
Incremental Inventory Import	Controls the generation of email notifications when the *Incremental Inventory Import* does not run successfully. Possible settings: • *Administrator:* generate an email notification to the *Administrative email* if Order Broker cannot retrieve updated inventory information. • *Nothing:* do not generate an email if Order Broker cannot retrieve inventory updates. Default setting. **For more information:** See the *Incremental Inventory Import*.
Email Settings	
Administrative email	The email address(s) to receive system-wide email notifications, including the *Proximity Upload Status Email*, *Incremental Inventory Import Status Email*, *Product Import Status Email*, and the duplicate order alert email. This email address is also used if a job is rejected because of a conflicting job; see *Schedule Jobs* for a discussion of jobs that might conflict. You can enter multiple email addresses, separating each with a semicolon (;). • Order Broker uses this email address, rather than the email address specified for the *admin user* at the *User Profiles* screen. • If you do not specify an internal email address, contact your email systems administrator to reset your mail server configuration to enable Order Broker to generate emails to addresses outside your company domain. For more information on the duplicate order alert email, see the SubmitOrder Request Message in the *Operations Guide* on My Oracle Support (2114324.1).

Field	Description
From Email Alias	The alias to display with the "from" address for administrative emails, for example, `My Email Alias <no-reply-omni@oracledomain.com>`. The actual "from" address is set by Oracle and cannot be changed. Your entry can be up to 40 positions and can include letters, numbers, spaces, and special characters, and does not need to be a valid, existing email address. If you do not specify an email alias here, Order Broker generates emails using the defined "from" email address without including an alias.
Event Notifications	Use these fields to configure Order Broker to generate a job notification web service message to an external system each time one of the following job completes: • *Auto Cancel Unclaimed Pickup Orders* • *Completed Order Private Data Purge* • *Daily Clean Up* • *Email Notifications* • *Fulfilled Inventory Export* • *Incremental Inventory Import* • *Inventory Quantity Export* • *Product Import* • *Incremental Inventory Import* **For more information:** See the *Job Notification Messages* appendix in the Operations Guide for details on the message contents and troubleshooting information.
Job Notification URL	The URL to receive the job notifications. Up to 255 positions. **Note:** When the Authentication Type is set to *OAuth*, the URL must implement `getAuthToken` to obtain the token. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Message Version	Indicates the version of the Job Notification message to generate when a job completes. If the message version is 2.0, the Job Notification includes the `jobRequestId`. The `jobRequestId` is also included in the Run Job API response, enabling an integrating system that uses the Run Job API to connect the Run Job request with the completion of the submitted job. The version is set to 1.0 by default.

Field	Description
Wait Time	The number of seconds to wait for a response. Defaults to 30. Required. **Note:** A response is not required.
Authentication Type	Indicates whether to use *Basic* or *OAuth* authentication. When the authentication type is *Basic*, you need to enter: • *User ID* • *Password* When the authentication type is *OAuth*, you need to enter: • *Client ID* • *Client Secret* See *Manage External Application Access* for background.
User ID	The user ID to use for authenticating the message in the system receiving the notification.This field is available only when the *Authentication Type* for a URL connection is set to *Basic*; otherwise, the *Client ID* field is available. Up to 50 positions. Required when a Job URL is specified and Basic authentication is selected.
Password	The password to use for authenticating the message in the system receiving the notification. Available only when a URL is specified and when the *Authentication Type* is set to *Basic*; otherwise, the *Client Secret* field is available. Required when Basic authentication is selected. Your entry is masked on the screen and encrypted in the database.
Client ID	Identifies Order Broker as a client application for authentication using OAuth. Available only when the *Authentication Type* is *OAuth*. Required when OAuth authentication is selected. **For more information:** See *Manage External Application Access* for background on OAuth authentication.
Client Secret	The client secret to authenticate Order Broker as a client application in order to obtain a token. Available only when the *Authentication Type* is *OAuth*. Required when OAuth authentication is selected. **For more information:** See *Manage External Application Access* for background on OAuth authentication.
Retry Attempts	Determines the number of times to attempt to retry sending a notification if there are communication issues. If this field is set to: • 0, Order Broker does not attempt to resend a notification. • 1-100, Order Broker retries sending the notification the specified number of times, using the Retry Attempt Wait Time as the interval to pause between retry attempts. Defaults to 0. A value from 0 to 100 is required.
Retry Attempt Wait Time	The number of minutes to wait between retry attempts. Must be set to a number from 1 to 60 if the Retry Attempts is not set to 0. Defaults to 0.
# of Current Retry Attempts	The total number of job notifications that Order Broker will attempt to retry after the next Retry Attempt Wait Time has elapsed. Display-only.

Field	Description
# of Held Failed Notifications	The total number of notification attempts that have failed. This total can include multiple attempts for the same notification. Held attempts are retained so they can be retried periodically, based on the Retry Attempt Wait Time. Display-only. A number of failed notifications often indicates that the URL is incorrect or not available, the port number is incorrect, or that the authentication credentials are incorrect. **Maximum retry attempts:** After 50,000 failed attempts, Order Broker stops retrying to send the job notifications.

Roles

Purpose: Use the **Roles** screen to work with user roles that control:

- a *retailer user*'s access to screens and actions in Order Broker
- a *vendor user*'s access to screens in the *Vendor Portal* (available if Use Vendor Portal is selected at the *Tenant* screen)

Admin user: An *admin user* has authority to all screens and does not need role assignment.

Making roles more or less specific: You can assign each user to one or more roles; for example, you can set up one role to control access to products and another role to control access to order inquiry, and assign a user to both of these roles if needed. You can also set up a single role to control authority to all systems-related options so that you can assign all authority to administrative users more easily.

> **Note:**
>
> The ability of a *retailer user* to generate specific reports is not controlled by role. For example, if a retailer user has authority to generate reports, but does not have authority to drop ship options, the user can still generate drop ship reports.

How to display this screen: Select *Roles* from the *Systems Menu*. The landing page does not have a shortcut to this screen.

> **Note:**
>
> Only users with *Roles* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
create a new role	1. Optionally, select a *Role Type* and enter a *Role Name*. If you do not complete these fields here, you can complete them in the *Role Wizard*. 2. Click *New* to advance to the *Role Wizard*. See the Role Wizard for complete instructions.
search for a role	Use any combination of the fields at the top of the screen and click *Search* to restrict the search results to matching roles: 1. Optionally, select a from the *Role Type* drop-down box to restrict your results to roles of that type. **Note:** You can leave the *Role Type* blank to remove this field from your selection criteria. 2. Optionally, enter a full or partial *Role Name* to restrict your results to roles that contain your entry. 3. Click *Search*. **Case:** The Role Name is case-sensitive for searching; for example, an entry of `vend` does not match a role name of `Vendor Admin`.
select a role for review	Click the role to open the *Browse Role* window. This window displays the authority provided by the role, and any assigned users.
select a role for maintenance	Click the edit icon ( ) to advance to the *Role Wizard*, where you can review or update the role.
delete a role	Select the delete icon ( ) next to a role to delete the role from Order Broker. **Note:** You can delete a role even if it is assigned to one or more users. When you delete a role, the role is removed from any assigned users.

Fields at this screen

Field	Description
Search/new fields:	

Field	Description
Role Type	Role types are: • *Retailer:* Controls access to Order Broker screens and functions when assigned to a *retailer user* profile • *Vendor:* Controls access to Vendor Portal screens when assigned to a *vendor user* profile (available if Use Vendor Portal is selected at the *Tenant* screen)
Role Name	The name of a role. Role names can be 1 to 40 positions in length and must be unique in Order Broker. The name can include special characters and spaces. To search for a role, enter a full or partial role name and click *Search* to display roles that start with or match your entry. Case-sensitive for searching; for example, an entry of `vend` does not match a role name of `Vendor Admin`.
Results fields:	
Role Name	The name of a role. Role names can be 1 to 40 positions in length and must be unique in Order Broker. The name can include special characters and spaces.
Role Type	Role types are: • *Retailer:* Controls access to Order Broker screens and functions when assigned to a *retailer user* profile • *Vendor:* Controls access to Vendor Portal screens when assigned to a *vendor user* profile (available if Use Vendor Portal is selected at the *Tenant* screen)
Edit	Select the edit icon ( ) next to a role to advance to the *Role Wizard*.
Delete	Select the delete icon ( ) next to a role to delete the role from Order Broker. This option is available even if the role is assigned to one or more users. When you delete a role, the role is removed from any assigned users.

Delivered roles

Delivered retailer user roles: The following retailer roles are delivered with Order Broker:

- *System Administration:* Includes authority to all available menu options.
- *System Configuration:* Includes authority to:
  - Orders (Inquiry): All authority included.
  - Products: All authority included.
  - Locations: All authority included.
  - Reports: All authority included.
  - Authority to Systems options is not included.
- *Order Maintenance:* Includes authority to the Orders menu, including the ability to update an order. Also, includes authority to run and view all reports.
- *Order Inquiry:* Includes authority to the Orders menu, but without the ability to update an order. Also, includes authority to run and view all reports.
- *Drop Ship Coordinator:* Includes authority to:

- Orders: Purchase Order Inquiry, Invoice Inquiry, and Invoice Maintenance.
- Products: Products. Additional *Products* authority (Probable Quantity Location, Probable Quantity Rules, Probability Location, and Probability Rules) is not delivered.
- Locations: Organizations and Preferences > Organizations and Preferences, Brands, and Vendors.
- Reports: Run, View, and Schedule Reports.
- Systems: Vendor User Profiles, Boxes, and Carriers.

Delivered vendor user role: The Vendor Admin user role includes all possible authority to the screens in the Vendor Portal. Delivered with Order Broker.

Browse Role

Purpose: Use the **Browse Role** window to review a *retailer user* or *vendor user* role, including the authority it controls and the users currently assigned to the role.

How to display this window: Click a role once at the *Roles* screen.

> **Note:**
>
> Only users with *Roles* authority can display this screen. See the *Role Wizard* for more information.

Options at this window

Option	Procedure
edit the displayed role	Click *Edit* to advance to the *Role Wizard*.
review the next role	Click the next icon () to display the next role.
review the previous role	Click the previous icon () to display the previous role.

Fields at this window

Field	Description
Role Name	The name of a role. The name can include special characters and spaces.
Role Type	Role types are: • *Retailer:* Controls access to Order Broker screens when assigned to a *retailer user* profile • *Vendor:* Controls access to Vendor Portal screens when assigned to a *vendor user* profile (available if Use Vendor Portal is selected at the *Tenant* screen)

Field	Description
Allowed User Authority	Lists each type of retailer or vendor secured feature (such as *Systems*) and feature description (such as *Event Logging*) provided by the role. See the *Authority* step in the Role Wizard for a complete listing.
Assigned Users	Lists each retailer or vendor user assigned to the role. See *User Profiles* or *Vendor User Profiles* for more information.

Role Wizard

Purpose: Use the **Role Wizard** to create or edit roles you use to control users' authority to different menu options. There are different types of authority available for assignment to:

- *retailer user*s with access to Order Broker screens for either the Routing Engine or Supplier Direct Fulfillment modules
- *vendor user*s with access to the *Vendor Portal* (available if Use Vendor Portal is selected at the *Tenant* screen)

Admin user: An *admin user* has authority to all screens and does not need role assignment.

Making roles more or less specific: You can assign each user to one or more roles; for example, you can set up one role to control access to products and another role to control access to order inquiry, and assign a user to both of these roles if needed. You can also set up a single role to control authority to all systems-related options so that you can assign all authority to administrative users more easily.

Delivered roles: Order Broker is delivered with predefined roles. See *Delivered roles* for details. Make sure to review the authority associated with these roles prior to assigning them to a user.

Steps to creating a role: The basic steps to creating or modifying a role are:

1. *Specify Role Name*: specify the name for a role and whether it applies to retailers or vendors.
2. *Authority*: specify the authority available to users with the role. The authorities available for selection vary depending on whether you are setting up a retailer or vendor role.
3. *Users*: specify the users to assign to the role. You can also assign users to a role later, through the:
   - **Role Wizard**
   - *User Profile Configuration* screen (*retailer user*s)
   - *Vendor User Profile* screen (*vendor user*s)
4. *Review Role*: review the role before you accept your entries or changes.

How to display:

- *creating a role:* click *New* at the *Roles* screen
- *changing or reviewing a role:*
- click the edit icon ( ) next to a zone at the *Roles* screen, or
- click *Edit* at the *Browse Role* window

> **Note:**
>
> Only users with *Roles* authority can display this screen. See the *Role Wizard* for more information.

In this topic: This topic includes the Role Wizard steps:

1. *Specify Role Name*
2. *Authority*
3. *Users*
4. *Review Role*

Specify Role Name

Purpose: Use this first step in the Role Wizard to specify the name of the role and indicate whether it applies to retailer or vendor users.

How to display:

- *creating a role:* click *New* at the *Roles* screen
- *changing a role:*
  – click the edit icon ( ) next to a role at the *Roles* screen, or
  – click *Edit* at the *Browse Role* window

Fields at this screen

Field	Description
Role Name	The name of a role. Role names can be 1 to 40 positions in length and must be unique in Order Broker. The name can include special characters and spaces.
Role Type	Role types are: • *Retailer:* Controls access to Order Broker screens and functions when assigned to a *retailer user* profile • *Vendor:* Controls access to Vendor Portal screens when assigned to a *vendor user* profile (available if Use Vendor Portal is selected at the *Tenant* screen)
Identity Cloud User Default	Select this flag to have the role assigned to all users imported through the *Identity Cloud User Synchronization* job.

Completing this step:

1. Enter or change the Role Name. Names can be 1 to 40 positions long and must be unique in Order Broker. If you entered a name at the *Roles* screen when creating a role, the name defaults here. The name can include special characters and spaces.
2. Specify whether the role applies to retailers or vendors by selecting a Role Type.

> **Note:**
>
> Selecting the Role Type is available only when you are creating a role.

3. Click *Next* to continue to the *Authority* step, or click *Cancel* to exit the Role Wizard without saving your entries.

Authority

Purpose: Use this second step in the Role Wizard to specify the authority available to users assigned to the role.

Adding a secured feature to a role:

- In the *Eligible User Authority* window, select the secured feature to assign to the role. See the Fields at this screen, below, for a listing of each feature and the authority it controls.
- Drag the secured feature to the *Allowed User Authority* window.

Removing an existing secured feature from a role:

- In the *Allowed User Authority* window, select the secured feature to remove to the role.
- Drag the secured feature to the *Eligible User Authority* window.

Completing this step: Click:

- *Next* to continue to the *Users* step.
- *Previous* to return to the *Specify Role Name* step.
- *Cancel* to exit the Role Wizard and discard your entries or changes.

> **Note:**
>
> All secured features for the Routing Engine and the Supplier Direct Fulfillment module are available for assignment, regardless of the modules specified at the *Tenant* screen.

Fields at this screen

Type of Secured Feature	Feature Description	Controls Access To Screen or Window and Subsequent Screens and Windows:
Eligible or Allowed User Authority: Retailer Roles	**Note:** Certain features listed below are available only with the Supplier Direct Fulfillment module. See the individual screens and windows for more information.	
Inquiry	Invoice Inquiry	*Invoice Inquiry*

Type of Secured Feature	Feature Description	Controls Access To Screen or Window and Subsequent Screens and Windows:
	Invoice Maintenance	*Approve Invoice* and *Reject Invoice* **Note:** Authority to Invoice Inquiry is also required for a user to advance to the *Invoice* screen via the *Invoice Inquiry* screen.
	Order Inquiry	*Order Inquiry*
	Order Maintenance	*Order*: ability to edit *Edit Order Item*: if not authorized, advance instead to *Browse Order Item* **Note:** Authority to Order Inquiry is also required for a user to advance to the *Order* screen via the *Order Inquiry* screen.
	Purchase Order Inquiry	*Purchase Order Inquiry*
Locations	Attribute Definitions	*Attribute Definitions* **Note:** This authority is not required to advance to the *Product Attributes* or the *Location Attributes* screen. These screens are available to users with Products or Locations authority.
	Brands	Brands screen in Modern View
	Fulfillment Zones	*Fulfillment Zones*
	Location Bulk Updates	*Location Bulk Updates*
	Location Types	*Location Types*
	Locations	*Locations*
	Order Broker Preference Overrides	*Order Broker Preference Overrides*
	Organizations and Preferences	Organizations in Modern View and the *Organizations and Preferences*, including the Order Broker Preferences, Drop Ship Preferences, and Store Connect Preferences screens.
	Vendors	*Vendors*
Products	Probable Quantity Location	*Probable Quantity Location*
	Probable Quantity Rules	*Probable Quantity Rules*
	Probability Location	*Probability Location*
	Probability Rules	*Probability Rules*
	Products	*Products*
Reports	Run Reports	*Run Reports*
	Schedule Reports	*Schedule Reports*

Type of Secured Feature	Feature Description	Controls Access To Screen or Window and Subsequent Screens and Windows:
	View Reports	*View Reports*
Systems	Boxes	Boxes in Modern View
	Carriers	Carriers in Modern View
	Event Logging	*Event Logging*
	Proximity Uploads	*Proximity Uploads*
	Order Reason Codes	Order Reason Codes screen in Modern View
	Reschedule All	The *Reschedule All* option at the *View Active Schedules* screen
	Roles	*Roles*
	Schedule Jobs	*Schedule Jobs*
	Systems	*Systems*
	Tenant	*Tenant* (advance to the *Tenant (retailer information)* screen unless you are an *admin user*, in which case you automatically have authority to advance to the *Tenant* screen)
	User Profiles	*User Profiles*
	Vendor User Profiles	*Vendor User Profiles*
	View Active Schedules	*View Active Schedules*, *View Sales Order Data Extract Job History*, *Incremental Imports History*, *Product Imports History*
	View Job History	*View Job History*
	Web Service Authorization	*Web Service Authorization*
	Manage External Services	*External Services*
	Manage External Application Access	*Manage External Application Access*,
	File Storage History	*File Storage History*
Eligible or Allowed User Authority: Vendor Roles	Available if Use Vendor Portal is selected at the *Tenant* screen for the screens and windows listed below to be available.	
Vendor Portal	Invoice Creation	Invoice Creation Invoice # field at Purchase Order Shipping screen Invoice Upload
	Purchase Order Changes	Purchase Order Change Requests
	Invoice Inquiry	Invoice Inquiry

Type of Secured Feature	Feature Description	Controls Access To Screen or Window and Subsequent Screens and Windows:
	Invoice Maintenance	Invoice: ability to edit Edit Invoice Detail: if not authorized, advance instead to Browse Invoice Detail
	Invoice Upload	Invoice Upload
	Preferences	Vendor Configuration
	Get Purchase Orders	Get Purchase Orders **Note:** This screen is not currently implemented.
	Integrated Shipping	Integrated Shipping
	Purchase Order Inquiry	Purchase Order Inquiry
	Purchase Order Maintenance	Purchase Order Maintenance
	Purchase Order Shipping	Purchase Order Shipping
	Purchase Order Shipping Upload	Purchase Order Shipping Upload
	Select Purchase Orders	Select Purchase Orders
	View Printed Pack Slips	View Printed Pack Slips
	Void / Reprint Pack Slip	Void / Reprint Pack Slip

Users

Purpose: Use this step to assign the role to existing users.

How to display: You advance to this step by clicking *Next* at the *Authority* step.

Which users are displayed? If the *Role Type* is:

- *Retailer:* All *retailer user* profiles are displayed in the *Eligible Users* area unless they are already assigned to the role.
- *Vendor:* All *vendor user* profiles are displayed in the *Eligible Users* area unless they are already assigned to the role (available if Use Vendor Portal is selected at the *Tenant* screen)

Assigning existing users to the role: Highlight a user name in the *Eligible Users* area and drag the name to the *Allowed Users* area.

Removing the role from existing users: Highlight a user name in the *Allowed Users* area drag it to the *Eligible Users* area.

Alternate method to assign roles:

- *Retailer users:* Use the *Authority* tab of the *User Profile Configuration* screen.
- *Vendor users:* Use the *Authority* tab of the *Vendor User Profile* screen (available if Use Vendor Portal is selected at the *Tenant* screen).

Alternate way to display a user's assigned roles:

- *Retailer users:* Highlight a user at the *User Profiles* screen to open the *Browse User Profile* window.

- *Vendor users:* Highlight a vendor user at the *Vendor User Profiles* screen to open the *Browse Vendor User Profile* window (available if Use Vendor Portal is selected at the *Tenant* screen).

Completing this step: Click:

- *Next* to continue to the *Review Role* step.
- Previous to return to the *Authority* step.
- *Cancel* to exit the Role Wizard and discard your entries or changes.

Review Role

Purpose: Use this step to review a role you have created or changed, including user assignment, and to accept or reject your entries or changes.

How to display: You advance to this step by clicking *Next* at the *Users* step.

This step displays the role you have created or changed using the role. See the *Authority* step for information on specifying the menu option authority available to the role, and see the *Users* step for information on assigning users to the role.

Completing this step: Click *Save* to accept your changes and save the role, or click *Cancel* to reject all changes to the role and return to the *Roles* screen. If you click *Cancel* while creating a new role, the role is not saved.

Optionally, click *Previous* to return to the *Users* step.

> **Note:**
>
> Depending on the number of users assigned to the role, there may be a slight delay after you select *Save*.

When does the role authority become available to the user? The role authority is available to the user the next time the user logs into Order Broker (*retailer user*) or the Vendor Portal (*vendor user*).

User Profiles

Purpose: Use the **User Profiles** screen to work with users, deactivate user logins, or delete users that have access to Order Broker for the purposes of configuring or reviewing settings and activity for either the Routing Engine module, the Supplier Direct Fulfillment module, or both.

Users anonymized? If a user has been *anonymized*, asterisks are displayed as the user’s name and email.

Anonymized users can still log into Order Broker and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

Vendor user profiles: See the *Vendor User Profiles* screen for information on working with vendor user profiles that control authority to the Vendor Portal.

Store associate user profiles: See the *Store Associate User Profiles* screen for information on working with store associate profiles that control authority to Store Connect.

Web service users: See the *Web Service Authorization* screen for information on working with user profiles used for web service authentication.

How to display this screen: Select *User Profiles* from the *Home Screen* or from the *Systems Menu*.

> **Note:**
>
> Only users with *User Profiles* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
search for a user profile	Use any combination of the fields at the top of the screen to restrict the search results to matching user profiles: • Enter a full or partial User ID to restrict your results to product user ID's starting with your entry. • Enter a full or partial Name to restrict your results to user profiles whose names contain your entry. You can't search by name for a user who has been *anonymized*. • Enter a full or partial Email to restrict your results to user profiles whose email addresses contain your entry. You can't search by email for a user who has been *anonymized*. • Set the Disabled logins drop-down box to *Yes* or *No* to restrict your results to user profiles that match your selection, or leave this field unselected to search for user profiles regardless of this setting. • Click *Search*. **Case:** The User ID is changed to lowercase automatically. The additional enterable fields on this screen (Name and Email) are case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`.
change an existing user	Click the edit icon ( ) for a user profile to advance to the *User Profile Configuration* screen. **Note:** If the *User Profile Configuration* screen is already open in another tab, you advance to that screen, where the previously-selected user profile is displayed.

Option	Procedure
deactivate or enable the login for a user profile	The inactive icon ( ) indicates that the user cannot currently log into Order Broker; otherwise, the active icon ( ) indicates that the user can currently log in. To switch between the settings, click the icon that is currently displayed. If someone attempts to log in using an inactive user ID, the login screen displays an error: `Log in failed`. You can deactivate a user account manually, but an account can also deactivated if there has been a series of unsuccessful login attempts equal to the number specified in the Lock Out field at the *Tenant* screen. If you change the user account back to Active status, the account remains inactive until the Lockout Duration specified in the User Lockout options in WebLogic has passed.
select a user for review	Click the user profile to open the *Browse User Profile* window. This window displays information about the user, including the user's assigned authority.
delete a user profile	Select the delete icon ( ) next to a user profile to delete the user profile from Order Broker. You cannot delete an *admin user* profile. Also, you cannot delete a user profile if there is order transaction history for the user. You cannot delete the default user. Also, deleting a user profile does not delete the user from IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). See *Identity Cloud User Synchronization* for more information.

Fields at this screen

Field	Description
Search fields:	
User ID	A unique ID to identify a user. The user ID is always lowercase.
Name	The user's name. Case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`. You can't search by name for a user who has been *anonymized*.
Email	Email addresses must be in the format of name@host.ext. You cannot enter more than one email address. Optional entry. Depending on your selections at the *Event Logging* screen, Order Broker might generate an email to this email address if the user uploads proximity or product attribute data; see that screen for more information on specifying the email address to use for various system notifications. Case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`. You can't search by email for a user who has been *anonymized*.

Field	Description
Disabled Logins	Use this flag to filter search results based on whether the users can currently log into Order Broker. Select: • *Yes* to display users who cannot log into Order Broker • *No* to display users who can log into Order Broker
Results fields:	
	Users anonymized? If a user has been *anonymized*, asterisks are displayed as the user's name and email. Anonymized users can still log into Order Broker and retain their current authority unless they are deactivated. See *Anonymizing Data* for background.
User ID	A unique ID to identify a user. The user ID can be 5 to 10 positions in length. Always lowercase.
Name	The user's name. Names can be 1 to 30 positions in length. If a user has been *anonymized*, asterisks are displayed as the user's name.
Email	Email addresses must be in the format of name@host.ext. You cannot enter more than one email address. If a user has been *anonymized*, asterisks are displayed as the user's email. Optional entry.

> **Note:**
>
> Depending on your selections at the *Event Logging* screen, Order Broker might generate an email to this email address if the user uploads proximity or product attribute data; see that screen for more information on specifying the email address to use for various system notifications.

Field	Description
Active	The inactive icon ( ) indicates that the user cannot currently log into Order Broker; otherwise, the active icon ( ) indicates that the user can currently log in. To switch between the settings, click the icon that is currently displayed. You can also use the Active flag at the *User Profile Configuration* screen to control whether a user can log in. You can deactivate a user account manually, but an account can also deactivated if there has been a series of unsuccessful login attempts equal to the number specified in the Lock Out field at the *Tenant* screen. If you change the user account back to Active status, the account remains deactivated until the Lockout Duration specified in the User Lockout options in WebLogic has passed. If someone attempts to log in using a deactivated user ID, the login screen displays an error: `Log in failed.`

Field	Description
Edit	Click the edit icon ( ) for a user profile to advance to the *User Profile Configuration* screen. At that screen, you can change information about the user, such as access rights or default shipping system. **Note:** If the *User Profile Configuration* screen is already open in another tab, you advance to that screen, where the previously-selected user profile is displayed.
Delete	Select the delete icon ( ) for a user profile to delete the user profile from Order Broker. This option is not available for an *admin user*. You cannot delete the default user. Also, deleting a user profile does not delete the user from IDCS or OCI IAM. See *Identity Cloud User Synchronization* for more information.

User Profile Configuration

Purpose: Use the **User Profile Configuration** screen to specify user authority, the user's default system, and the formats to display numbers, dates, and times on Order Broker screens. The user's default system indicates which system product code to display to the user at the *Order* screen.

Users anonymized? If a user has been *anonymized*, asterisks are displayed as the user's name and email.

Anonymized users can still log into Order Broker and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

How to display this screen:

- Click the edit icon ( ) for an existing user at the *User Profiles* screen.
- Click *Edit* at the *Browse User Profile* window.

Note:

- Only users with *User Profiles* authority can display this screen. See the *Role Wizard* for more information.
- If the **User Profile Configuration** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previously-selected user displayed.

Options at this screen

Option	Procedure
change any of the fields or settings for an existing user	• Change any of the enterable settings at the *Preferences* tab. • To change role assignment to control user authority, select the *Authority* tab and drag roles between the *Eligible Roles* and *Assigned Roles* areas. • Click *Save* to update the user. • The user should log out of Order Broker and then log back in to apply the changes.

Fields at this screen

Fields	Description
User	
User ID	Up to 256 positions, alphanumeric. Display-only. Always lowercase. **Users anonymized?** If a user has been *anonymized*, asterisks are displayed as the user's name and email. Anonymized users can still log into Order Broker and retain their current authority unless they are deactivated. See *Anonymizing Data* for background.
Name	1 to 30 positions, alphanumeric. Required. Asterisks are displayed if the user has been *anonymized*.
Email	Must be in the format of name@host.ext. You cannot enter more than one email address. Depending on your selections at the *Event Logging* screen, Order Broker might generate an email to this email address if the user uploads proximity data; see that screen for more information. Asterisks are displayed if the user has been *anonymized*. Optional.
Active	Indicates whether the user can log into Order Broker. You can also use the *Disable Login* option at the *User Profiles* screen to control whether a user can log in.
Cloud Service User Id	The user name identifying the user in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). Up to 255 positions. Display-only.
Preferences	
Default Shipping System	Indicates the system product code to display as the *Item #* at the *Order* screen. This field is required unless you have not yet created any systems in Order Broker.

Fields	Description
Data Formats	The following fields control the display of data on Order Broker screens for the user. They do not control the format of data on reports or in emails, or the datetime stamps for archived file names. **For more information:** See *Localization Settings* for information on how language and data format settings are defined.
Date Format	The format to use for the display of dates on Order Broker screens: • MM/DD/YYYY (default): Month/day/year, for example: 12/31/2016 • DD.MM.YYYY: Day.month.year, for example: 31.12.2016 • DD/MM/YYYY: Day/month/year, for example: 31/12/2016 • YYYY/MM/DD: Year/month/day, for example: 2016/12/31 • DD-MM-YYYY: Day-month-year, for example: 31-12-2016 Required.
Time Format	The format to use for the display of times on Order Broker screens: • AM/PM (default): For example: 11:40 AM • 24 Hour: For example: 13:01 Required.
Decimal Separator	The character to use as a decimal separator on Order Broker screens: • Period (default): For example, 12.34 • Comma: For example, 12,34 Required. **Note:** The decimal separator and the thousands separator cannot be the same.
Thousands Separator	The character to use as a separator on Order Broker screens for numbers over 3 positions: • Comma (default) For example, 1,234 • Period: For example, 1.234 • Space: For example, 1 234 Required. **Note:** The decimal separator and the thousands separator cannot be the same.

Fields	Description
Authority	**Note:** All authority is selected by default for the admin user and cannot be removed. **Alternate method to assign authority:** You can assign authority to an existing user through this screen, or through the *Users* step in the *Role Wizard*.
Eligible Roles	This area displays all available roles set up to control authority for *retailer users* that are not currently assigned to this user. To assign a role, highlight it and drag it to the Assigned Roles area. **For more information:** See the *Role Wizard*, especially the *Authority* step, for information on setting up roles and the authority that a role can control.
Assigned Roles	This area displays all roles to which the user is currently assigned. To remove a role, highlight it and drag it to the Eligible Roles area.

Browse User Profile

Purpose: Use the **Browse User Profile** window to review a user with authority to Order Broker screens.

> **Note:**
>
> See *Vendor User Profiles* for information on setting up vendor users for the Supplier Direct Fulfillment module, *Store Associate User Profiles* for information on setting up store associate users, and *Web Service Authorization* for information on setting up web service users.

Users anonymized? If a user has been *anonymized*, asterisks are displayed as the user’s name and email.

Anonymized users can still log into Order Broker and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

How to display this window: Click a user profile once at the *User Profiles* screen.

> **Note:**
>
> Only users with *User Profiles* authority can display this screen. See the *Role Wizard* for more information.

Options at this window

Option	Procedure
edit the displayed user	Click *Edit* to advance to the *User Profile Configuration* screen.
review the next user profile	Click the next icon () to display the next user profile.
review the previous user profile	Click the previous icon () to display the previous user profile.

Fields at this window

Field	Description
User ID	Up to 256 positions, alphanumeric. Always lowercase. **Users anonymized?** If a user has been *anonymized*, asterisks are displayed as the user's name and email. Anonymized users can still log into Order Broker and retain their current authority unless they are deactivated. See *Anonymizing Data* for background.
Name	1 to 30 positions, alphanumeric.
Email	Depending on your selections at the *Event Logging* screen, Order Broker might generate an email to this email address if the user uploads proximity data; see that screen for more information.
Cloud Service User Id	The user name identifying the user in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management).
Shipping System	The code and description of the user's default system. Controls the system product code to display as the *Item #* at the *Order* screen.
Active	Set to *No* if the user cannot currently log into Order Broker; otherwise, set to *Yes* if the user can currently log in. Based on the setting of the Disable Login icon at the *User Profiles* screen or the Active flag at the *User Profile Configuration*.
Data Formats	The following fields control the display of data on Order Broker screens for the user. They do not control the format of data on reports or in emails, or the datetime stamps for archived file names. **For more information:** See *Localization Settings* for information on how language and data format settings are defined.
Date Format	The format to use for the display of dates on Order Broker screens: • MM/DD/YYYY (default): Month/day/year, for example: 12/31/2016 • DD.MM.YYYY: Day.month.year, for example: 31.12.2016 • DD/MM/YYYY: Day/month/year, for example: 31/12/2016 • YYYY/MM/DD: Year/month/day, for example: 2016/12/31 • DD-MM-YYYY: Day-month-year, for example: 31-12-2016
Time Format	The format to use for the display of times on Order Broker screens: • AM/PM (default): For example: 11:40 AM • 24 Hour: For example: 13:01

Field	Description
Decimal Separator	The character to use as a decimal separator on Order Broker screens: • Period (default): For example, 12.34 • Comma: For example, 12,34
Thousands Separator	The character to use as a separator on Order Broker screens for numbers over 3 positions: • Comma (default) For example, 1,234 • Period: For example, 1.234 • Space: For example, 1 234
Authority	Indicates the roles to which the user is currently assigned. See the *Role Wizard* for background.

Vendor User Profiles

Purpose: Use the **Vendor User Profiles** screen to work with vendor users that have access to the *Vendor Portal*, deactivate vendor user logins, or delete vendor users.

About vendor users: Vendor users are associated with a single vendor, and when they log into the *Vendor Portal*, only that vendor's information is available.

Each vendor record is associated with a single organization. If the same vendor fulfills drop ship purchase orders for multiple organizations, you need to create a separate vendor record for each organization.

Used for the Supplier Direct Fulfillment module.

Vendor users anonymized? If a vendor user has been *anonymized*, asterisks are displayed as the vendor user's name and email.

Anonymized vendor users can still log into the Vendor Portal and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

Creating vendor users: See *Identity Cloud User Synchronization*.

How to display this screen: Select *Vendor User Profiles* from the *Home Screen* or from the *Systems Menu*.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Vendor User Profiles* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
search for a vendor user profile	Optionally, use any combination of the fields at the top of the screen to restrict the search results to matching vendor user profiles: • Select a different Organization to work with vendors for that organization. • Select a Vendor to work with user profiles for that vendor. • Enter a full or partial User ID to restrict your results to user ID's starting with your entry. • Enter a full or partial Name to restrict your results to user profiles whose names contain your entry. You can't search by name for a vendor user who has been *anonymized*. • Enter a full or partial Email to restrict your results to user profiles whose email addresses contain your entry. You can't search by email address for a vendor user who has been *anonymized*. • Set the Disabled logins drop-down box to *Yes* or *No* to restrict your results to user profiles that match your selection, or leave this field unselected to search for user profiles regardless of this setting. • Click *Search*. **Case:** The User ID is changed to lowercase automatically. The additional enterable fields on this screen (Name and Email) are case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`.
change an existing vendor user's name, email, or authority, or activate or deactivate the user's login	Click the edit icon ( ) for a vendor user profile to advance to the *Vendor User Profile* screen. **Note:** If the *Vendor User Profile* screen is already open in another tab, you advance to that screen, where the previously-selected vendor user profile is displayed.

Option	Procedure
activate or deactivate the login for a vendor user profile	The inactive icon ( ) indicates that the vendor user cannot currently log into the *Vendor Portal*; otherwise, the active icon ( ) indicates that the vendor user can currently log in. To switch between the settings, click the icon that is currently displayed. You can also use the Active flag at the *Vendor User Profile* screen to control whether a vendor user can log in. If someone attempts to log into the Vendor Portal using an inactive user ID, the login screen displays an error: `Log in failed.` **Note:** Even if the vendor user profile is enabled, no users for a vendor can log into the *Vendor Portal* if the vendor itself is currently flagged as *Inactive* at the *Vendors* screen.
select a vendor user for review	Click the vendor user profile to open the *Browse Vendor User Profile* window. This window displays information about the vendor user, including the vendor user's assigned authority.
delete a vendor user profile	Select the delete icon ( ) next to a vendor user profile to delete the vendor user profile from Order Broker. You can delete a vendor user profile even if there is purchase order history for the user.

Fields at this screen

Field	Description
Search fields:	
Organization	See *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.
Vendor	A *vendor* who fulfills drop ship purchase orders originating in an integrated system such as Order Management System. Vendor users are associated with a single vendor, and when they log into the *Vendor Portal*, only that vendor's information is available. See the *Vendors* screen for a discussion of vendors.
User ID	A unique ID to identify a vendor user with authority to log into the *Vendor Portal*. The user ID can be 5 to 50 positions in length. Always lowercase; entries in uppercase are automatically changed to lowercase.

Field	Description
Name	The vendor user's name. Names can be 1 to 30 positions in length. Case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`. You can't search by name for a vendor user who has been *anonymized*.
Email	Email addresses must be in the format of name@host.ext. You cannot enter more than one email address. Optional entry. Informational only; email notifications to the vendor are sent to the emails specified at the *Emails options* folder under the *Preferences* tab of the *Edit Vendor* or **New Vendor** screen. Case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`. You can't search by email address for a vendor user who has been *anonymized*.
Disabled Logins	Use this flag to filter search results based on whether the vendor users can currently log into the *Vendor Portal*. Select: • *Yes* to display vendor users who cannot log into the *Vendor Portal* • *No* to display vendor users who can log into the *Vendor Portal* **Note:** This flag is used for search only. Your selection here does not apply when you are creating a new vendor user.
Results fields:	
	Vendor users anonymized? If a vendor user has been *anonymized*, asterisks are displayed as the vendor user's name and email. Anonymized vendor users can still log into the Vendor Portal and retain their current authority unless they are deactivated. See *Anonymizing Data* for background.
Vendor	A *vendor* who fulfills drop ship purchase orders originating in an integrated system such as Order Management System. Vendor users are associated with a single vendor, and when they log into the *Vendor Portal*, only that vendor's information is available. See the *Vendors* screen for a discussion of vendors.
User ID	A unique ID to identify a vendor user. The vendor user ID can be 5 to 50 positions in length. Always lowercase.
Name	The vendor user's name. Names can be 1 to 30 positions in length. Asterisks are displayed if the user has been *anonymized*.
Email	Informational only; email notifications to the vendor are sent to the emails specified at the *Emails options* folder under the *Preferences* tab of the *Edit Vendor* or **New Vendor** screen. Asterisks are displayed if the user has been *anonymized*.

Field	Description
Active	The inactive icon ( ) indicates that the vendor user cannot currently log into the *Vendor Portal*; otherwise, the active icon ( ) indicates that the vendor user can currently log in. To switch between the settings, click the icon that is currently displayed. If someone attempts to log in using an inactive user ID, the login screen displays an error: `Log in failed.` **Note:** Even if the vendor user profile is active, no users for a vendor can log into the *Vendor Portal* if the vendor itself is currently flagged as *Inactive* at the *Vendors* screen.
Edit	Click the edit icon ( ) for a vendor user profile to advance to the *Vendor User Profile* screen. At that screen, you can change an existing vendor user's preferences and authority. **Note:** If the *Vendor User Profile* screen is already open in another tab, you advance to that screen, where the previously-selected vendor user profile is displayed.
Delete	Select the delete icon ( ) for a vendor user profile to delete the vendor user profile from Order Broker.

Vendor User Profile

Purpose: Use the **Vendor User Profile** screen to review or change a vendor user profile.

Used for the Supplier Direct Fulfillment module.

How to display this screen:

- Click the edit icon ( ) for an existing vendor user at the *Vendor User Profiles* screen. See that screen for more information.
- Click *Edit* at the *Browse Vendor User Profile* window.

Vendor users anonymized? If a vendor user has been *anonymized*, asterisks are displayed as the vendor user's name and email.

Anonymized vendor users can still log into the Vendor Portal and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

Completing this screen: Click *Save* when you are done to apply updates to an existing vendor user; otherwise, click *Cancel*.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Vendor User Profiles* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
change any of the fields or settings for an existing user	1. Change any of the enterable settings at the *Preferences* tab. 2. To change role assignment to control user authority, select the *Authority* tab and drag roles between the *Eligible Roles* and *Assigned Roles* areas. 3. Click *Save* to update the vendor user. **Note:** The user should log out of the Vendor Portal and then log back in to apply the changes.

Fields at this screen

Fields	Description
User	
User ID	5 to 50 positions, alphanumeric. Always lowercase. Display-only.
Vendor	The vendor associated with the vendor user.
Preferences	
User ID	5 to 50 positions, alphanumeric. Always lowercase. **Vendor users anonymized?** If a vendor user has been *anonymized*, asterisks are displayed as the vendor user's name and email. Anonymized vendor users can still log into the Vendor Portal and retain their current authority unless they are deactivated. See *Anonymizing Data* for background.
Name	1 to 30 positions, alphanumeric. Required. Asterisks are displayed if the user has been *anonymized*.

Fields	Description
Email	Must be in the format of name@host.ext. You cannot enter more than one email address. Optional. Informational only; email notifications to the vendor are sent to the emails specified at the *Emails options* folder under the *Preferences* tab of the *Edit Vendor* or **New Vendor** screen. Asterisks are displayed if the user has been *anonymized*.
Active	Indicates whether the vendor user can log into the *Vendor Portal*. You can also use the *Disable Login* option at the *Vendor User Profiles* screen to control this setting. **Note:** Even if the vendor user profile is enabled, no users for a vendor can log into the *Vendor Portal* if the vendor itself is currently flagged as *Inactive* at the *Vendors* screen.
Authority	**Alternate method to assign authority:** You can assign authority to an existing vendor user through this screen, or through the *Users* step in the *Role Wizard*. **Vendor user with no authority?** Optionally, you can create a vendor user profile with no assigned roles. This user, if active, can log into the *Vendor Portal* to review the charts and information at the home screen, but cannot advance to any modules.
Eligible Roles	This area displays all available roles set up to control authority for vendor users that are not currently assigned to this user. To assign a role, highlight it and drag it to the Assigned Roles area. **For more information:** See the *Role Wizard*, especially the *Authority* step, for information on setting up roles and the authority that a role can control.
Assigned Roles	This area displays all roles to which the vendor user is currently assigned. To remove a role, highlight it and drag it to the Eligible Roles area.

Browse Vendor User Profile

Purpose: Use the **Browse Vendor User Profile** window to review a vendor user.

Used for the Supplier Direct Fulfillment module.

How to display this window: Click a vendor user profile once at the *Vendor User Profiles* screen.

> **Note:**
>
> Available if Use Vendor Portal is selected at the *Tenant* screen. Only users with *Vendor User Profiles* authority can display this screen. See the *Role Wizard* for more information.

Vendor users anonymized? If a vendor user has been *anonymized*, asterisks are displayed as the vendor user's name and email.

Anonymized vendor users can still log into the Vendor Portal and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

Options at this window

Option	Procedure
edit the displayed vendor user	Click *Edit* to advance to the *Vendor User Profile* screen.
review the next vendor user profile	Click the next icon () to display the next vendor user profile.
review the previous vendor user profile	Click the previous icon () to display the previous vendor user profile.

Fields at this window

Field	Description
Vendor	The vendor you selected when creating the vendor user. When the vendor user logs into the *Vendor Portal*, only this vendor's data is displayed.
User ID	5 to 50 positions, alphanumeric. Always lowercase. **Vendor users anonymized?** If a vendor user has been *anonymized*, asterisks are displayed as the vendor user's name and email. Anonymized vendor users can still log into the Vendor Portal and retain their current authority unless they are deactivated. See *Anonymizing Data* for background.
Name	1 to 30 positions, alphanumeric. Asterisks are displayed if the user has been *anonymized*.
Email	Informational only; email notifications to the vendor are sent to the emails specified at the *Emails options* folder under the *Preferences* tab of the *Edit Vendor* or **New Vendor** screen. Asterisks are displayed if the user has been *anonymized*.

Field	Description
Active	Set to *No* if the vendor user cannot currently log into Order Broker; otherwise, set to *Yes* if the vendor user can currently log in. Based on the setting of the Disable Login icon at the *Vendor User Profiles* screen. **Note:** Even if the vendor user profile is enabled, no users for a vendor can log into the *Vendor Portal* if the vendor itself is currently flagged as *Inactive* at the *Vendors* screen.
Authority	Indicates the roles to which the vendor user is currently assigned. See the *Role Wizard* for background.

Store Associate User Profiles

Purpose: Use the **Store Associate User Profiles** screen to deactivate store associate user logins or delete existing store associate users.

About store associate users: Store associates have access only to *Store Connect* screens.

Used for: The Store Connect module.

Store associate users anonymized? If a store associate has been *anonymized*, asterisks are displayed as the associate's name and email.

Anonymized associates can still log into Store Connect and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

Creating store associates: See *Identity Cloud User Synchronization*.

How to display this screen: Select *Store Associate User Profiles* from the *Home Screen* or from the *Systems Menu*.

> **Note:**
>
> Available if Use Store Connect is selected at the *Tenant* screen. Only users with *Store Associate User Profiles* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
search for a store associate user profile	Optionally, use any combination of the fields at the top of the screen to restrict the search results to matching store associate user profiles: • Select a different *Organization* to work with store associates for that organization. • Enter a full or partial *User ID* to restrict your results to user ID's starting with your entry. • Enter a full or partial *Name* to restrict your results to user profiles whose names contain your entry. If the store associate has been *anonymized*, you can't search by name. • Enter a full or partial *Email* to restrict your results to user profiles whose email addresses contain your entry. If the store associate has been *anonymized*, you can't search by email address. • Set the *Disabled logins* drop-down box to *Yes* or *No* to restrict your results to user profiles that match your selection, or leave this field unselected to search for user profiles regardless of this setting. • Select a *Location* to restrict your results to store associates who are assigned to that store location. • Click *Search*. **Case:** The User ID is changed to lowercase automatically. The additional enterable fields on this screen (Name and Email) are case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`.
change an existing store associate user, or enable or deactivate the user's login	Click the edit icon ( ) for a store associate user profile to advance to the *Edit Store Associate User Profile* screen. **Note:** If the *Edit Store Associate User Profile* screen is already open in another tab, you advance to that screen, where the previously-selected store associate user profile is displayed.

Option	Procedure
deactivate or activate the login for a store associate user profile	The inactive icon ( ) indicates that the store associate user cannot currently log into *Store Connect*; otherwise, the active icon ( ) indicates that the store associate user can currently log in. To switch between the settings, click the icon that is currently displayed. You can also use the Active flag at the *Edit Store Associate User Profile* screen to control whether a store associate user can log in. If someone attempts to log into *Store Connect* using an inactive user ID, the login screen displays an error: `Log in failed.` **Note:** Even if the store associate user profile is enabled, the associate must be assigned to a store location in order to log into Store Connect.
select a store associate user for review	Click the store associate user profile to open the *Browse Store Associate User Profile* window. This window displays information about the store associate user, including the store associate user's assigned authority and location(s).
delete a store associate user profile	Select the delete icon ( ) next to a store associate user profile to delete the store associate user profile from Order Broker. You can delete a store associate user profile even if there is history for the user. Deleting a store associate user profile does not delete the user from IDCS or OCI IAM.

Fields at this screen

Field	Description
Search fields:	
Organization	See *organization*. Defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default.
User ID	A unique ID to identify a store associate user with authority to log into Store Connect. Always lowercase; entries in uppercase are automatically changed to lowercase.
Name	The store associate user's name. Names can be 1 to 30 positions in length. Case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`. f the store associate has been *anonymized*, you can't search by name.

Field	Description
Email	Email addresses must be in the format of name@host.ext. You cannot enter more than one email address. Optional entry. Informational only. Case-insensitive for searching; for example, an entry of `j` matches both `John` and `john`. If the store associate has been *anonymized*, you can't search by email address.
Disabled Logins	Use this flag to filter search results based on whether the store associate users can currently log into Store Connect. Select: • *Yes* to display store associate users who cannot log into Store Connect • *No* to display store associate users who can log into Store Connect
Results fields:	**Store associate users anonymized?** If a store associate has been *anonymized*, asterisks are displayed as the associate's name and email. Anonymized associates can still log into Store Connect and retain their current authority unless they are deactivated. See *Anonymizing Data* for background.
User ID	A unique ID to identify a store associate user. The store associate user ID can be 5 to 30 positions in length. Always lowercase.
Name	The store associate user's name. Names can be 1 to 30 positions in length. If a store associate has been *anonymized*, asterisks are displayed as the associate's name.
Location	The code identifying the store location where the store associate is assigned. **No location?** This field is blank if the store associate is not assigned to any locations. In this case, the associate cannot log into Store Connect. **Multiple locations?** If you have used the *Edit Store Associate User Profile* screen to assign the associate to more than one location, the word *Multiple* is displayed here. An associate user who is assigned to more than one location must select the correct location when logging into Store Connect.
Email	Informational only. If a store associate has been *anonymized*, asterisks are displayed as the associate's email.
Active	The inactive icon ( ) indicates that the store associate user cannot currently log into *Store Connect*; otherwise, the active icon ( ) indicates that the store associate user can currently log in. To switch between the settings, click the icon that is currently displayed. You can also use the Active flag at the *Edit Store Associate User Profile* screen to control whether a store associate user can log in. If someone attempts to log into *Store Connect* using an inactive user ID, the login screen displays an error: `Log in failed.`

Note:

Even if the store associate user profile is enabled, the associate must be assigned to a store location in order to log into Store Connect.

Field	Description
Requires Locations	The icon ( ) indicates that the store associate has not yet been assigned to any locations.
Edit	Click the edit icon ( ) for a store associate user profile to advance to the *Edit Store Associate User Profile* screen. At that screen, you can change an existing store associate user's preferences, authority, and store assignment(s). **Note:** If the *Edit Store Associate User Profile* screen is already open in another tab, you advance to that screen, where the previously-selected store associate user profile is displayed.
Delete	Select the delete icon ( ) for a store associate user profile to delete the store associate user profile from Order Broker. You can delete a store associate even if there is history for the store associate user profile. Deleting a store associate user profile does not delete the user from IDCS or OCI IAM.

Edit Store Associate User Profile

Purpose: Use the **Edit Store Associate User Profile** screen to review or change a store associate user profile.

Used for: The Store Connect module.

How to display this screen:

- Click the edit icon ( ) for an existing store associate user at the *Store Associate User Profiles* screen.
- Click *Edit* at the *Browse Store Associate User Profile* window.

Store associate users anonymized? If a store associate has been *anonymized*, asterisks are displayed as the associate's name and email.

Anonymized associates can still log into Store Connect and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

Completing this screen: Change information as needed at the *Preferences tab* or *Locations tab*, and click *Save* when you are done to finish applying updates to an existing store associate user; otherwise, click *Cancel*.

> **Note:**
>
> Available if Use Store Connect is selected at the *Tenant* screen. Only users with *Store Associate User Profiles* authority can display this screen. See the *Role Wizard* for more information.

Update through a web service: You can assign a store associate to locations, as well as changing the associate's *Active* flag setting, through the Store Associate Location Assignment web service; see the *Operations Guide* on My Oracle Support (2114324.1) for more information. A store associate must be assigned to at least one location in order to use Store Connect.

Fields at this screen

Fields	Description
User ID	Always lowercase. Display-only.
Organization	The *organization* associated with the *Store Connect* system where the store associate works. Display-only.
Preferences tab	
Name	1 to 30 positions, alphanumeric. Required. Set to asterisks if the associate has been *anonymized*.
Email	Must be in the format of name@host.ext. You cannot enter more than one email address. Informational. Optional. Set to asterisks if the associate has been *anonymized*.
Active	Indicates whether the store associate user can log into Store Connect. You can also use the *Disable Login* option at the *Store Associate User Profiles* screen to control this setting.
Cloud Service User Id	The user name identifying the user in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). Display-only.
Data Formats	The following fields are not currently used. **For more information:** See *Localization Settings* for information on how language and data format settings are defined for Store Connect.
Date Format	The format to use for the display of dates on Store Connect screens: • MM/DD/YYYY (default): Month/day/year, for example: 12/31/2018 • DD.MM.YYYY: Day.month.year, for example: 31.12.2018 • DD/MM/YYYY: Day/month/year, for example: 31/12/2018 • YYYY/MM/DD: Year/month/day, for example: 2018/12/31 • DD-MM-YYYY: Day-month-year, for example: 31-12-2018 Required.
Time Format	The format to use for the display of times on Store Connect screens: • AM/PM (default): For example: 11:40 AM • 24 Hour: For example: 13:01 Required.

<table>
<tr><th>Fields</th><th>Description</th></tr>
<tr><td>Decimal Separator</td><td>The character to use as a decimal separator on Store Connect screens:
Period (default): For example, 12.34
Comma: For example, 12,34
Required.
Regardless of this setting, the percentage displayed for the pie chart on the Store Connect home screen always uses a period; for example, 99.9%.
The decimal separator and the thousands separator cannot be the same.</td></tr>
<tr><td>Thousands Separator</td><td>The character to use as a separator on Store Connect screens for numbers over 3 positions:
Comma (default) For example, 1,234
Period: For example, 1.234
Space: For example, 1 234
Required.

Note:
The decimal separator and the thousands separator cannot be the same.</td></tr>
<tr><td>Locations tab</td><td>All locations for the Store Connect system are displayed in either the Eligible Locations area (if not already assigned to the store associate) or the Assigned Locations area (if already assigned).

Assigning locations: To assign a location or remove the assignment, drag the location between the two areas.

Sorting: Optionally, sort on a column, expand a column, or rearrange columns before selecting locations. For example:
Click the Region column heading to sort locations by region.
Position the cursor between the Name and City column headings until the cursor turns into a double-pointed arrow, then drag the City column heading to the right to enlarge the Name column.
Position the cursor on the Rank column heading, drag the entire column to the left, and drop it between the Location and Name columns.
Filtering: Optionally, enter a full or partial location field to restrict the displayed locations to your entry. For example, enter a Postal Code of 016 to restrict the listed locations to those whose postal codes start with 016.</td></tr>
</table>

Fields	Description
Eligible Locations	Lists all *Store Connect* locations that are not currently assigned to the store associate. Information displayed includes: • Location: The code identifying a location. Location codes can be 1 to 10 positions in length, and must be unique for the system. • Name: The name describing the location. Location names can be 1 to 40 positions in length, and do not need to be the same as the name or description of the location in the Store Connect system. • City: The city where the location is located. Can be up to 35 positions. • State/Province: The U.S. state or Canadian province where the location is located. Can be up to 3 positions. • Country: The code identifying the country. Can be a two-position alpha, three-position alpha, or three-position numeric code, validated against the ISO 3166 list of country codes. • Postal Code: The U.S. ZIP code or Canadian postal code for the location. • Rank: The rank you have assigned to the location. Informational. Up to 10 positions. • Region: The region you have assigned to the location. Informational. Up to 20 positions. **Note:** You cannot assign the IN PROCESS location.
Assigned Locations	Lists all Store Connect locations that are currently assigned to the store associate. See Eligible Locations, above, for descriptions of each field.

Browse Store Associate User Profile

Purpose: Use the **Browse Store Associate User Profile** window to review a store associate user.

Used for: The Store Connect module.

Store associate users anonymized? If a store associate has been *anonymized*, asterisks are displayed as the associate's name and email.

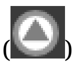
Anonymized associates can still log into Store Connect and retain their current authority unless they are deactivated.

See *Anonymizing Data* for background.

How to display this window: Click a store associate user profile once at the *Store Associate User Profiles* screen.

> **Note:**
>
> Available if Use Store Connect is selected at the *Tenant* screen. Only users with *Store Associate User Profiles* authority can display this screen. See the *Role Wizard* for more information.

Options at this window

Option	Procedure
edit the displayed store associate user	Click *Edit* to advance to the *Edit Store Associate User Profile* screen.
review the next store associate user profile	Click the next icon () to display the next store associate user profile.
review the previous store associate user profile	Click the previous icon () to display the previous store associate user profile.

Fields at this window

All fields are display-only.

Field	Description
Organization	The *organization* associated with the *Store Connect* system where the store associate works.
User ID	Always lowercase. If the user ID exceeds 60 positions, it is truncated.
Name	1 to 30 positions, alphanumeric. Asterisks are displayed if the associate has been *anonymized*.
Email	Informational. If the email address exceeds the available width, it is truncated. Asterisks are displayed if the associate has been *anonymized*.
Active	Set to *No* if the store associate user cannot currently log into Store Connect; otherwise, set to *Yes* if the store associate user can currently log in. Based on the setting of the Active icon at the *Store Associate User Profiles* screen.
Cloud Service User Id	The user name identifying the user in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). Up to 255 positions.
Data Formats	The following fields are not currently used. **For more information:** See *Localization Settings* for information on how language and data format settings are defined for Store Connect.
Date Format	The format to use for the display of dates on Store Connect screens: • MM/DD/YYYY (default): Month/day/year, for example: 12/31/2017 • DD.MM.YYYY: Day.month.year, for example: 31.12.2017 • DD/MM/YYYY: Day/month/year, for example: 31/12/2017 • YYYY/MM/DD: Year/month/day, for example: 2017/12/31 • DD-MM-YYYY: Day-month-year, for example: 31-12-2017
Time Format	The format to use for the display of times on Store Connect screens: • AM/PM (default): For example: 11:40 AM • 24 Hour: For example: 13:01

Field	Description
Decimal Separator	The character to use as a decimal separator on Store Connect screens: • Period (default): For example, 12.34 • Comma: For example, 12,34
Thousands Separator	The character to use as a separator on Store Connect screens for numbers over 3 positions: • Comma (default) For example, 1,234 • Period: For example, 1.234 • Space: For example, 1 234
Authority	Indicates the role(s) to which the store associate user is currently assigned. These roles do not currently control authority in Store Connect. See the *Role Wizard* for background.
Locations	The code and name of each location where the associate is currently assigned. See the *Locations tab* at the *Edit Store Associate User Profile* screen for more information on assigning locations.

Proximity Uploads

Purpose: Use the **Proximity Uploads** screen to update the zip or postal code information in the *proximity location table* if you use *proximity locator* but do not use the *Oracle Maps Cloud Service*.

Used for the Routing Engine module.

Areas for proximity locator searching: You can upload U.S. zip codes. Canadian postal codes, or international postal codes for Order Broker to use when performing *proximity locator* searches.

Required zip or postal code data: Before you use the **Proximity Uploads** screen, you need to obtain a CSV (comma-separated value) file containing the zip or postal code information. See the *Proximity upload process overview* for more details.

In this topic:

- *Proximity upload process overview*
- *Proximity CSV file layouts*
- *Troubleshooting*
- *Proximity Upload Status Email*
- *Fields at this screen*

How to display this screen: Select *Proximity Uploads* from the *Home Screen* or from the *Systems Menu*.

> **Note:**
>
> Available if Use Routing Engine is selected at the *Tenant* screen. Only users with *Proximity Uploads* authority can display this screen. See the *Role Wizard* for more information.

Proximity upload process overview

Purpose: Follow the steps below to update the zip or postal code information in the *proximity location table*.

Before you start: Obtain or create the CSV (comma-separated value) file for upload. See the *Proximity CSV file layouts* for details on the information required in this file.

Updating the proximity_location table: Perform the steps below at the **Proximity Uploads** screen.

> **Note:**
>
> It is important to schedule the update at a time when proximity searching is not required on your system, since once the update starts, proximity information will not be available until the update is complete. Each time Order Broker updates the proximity location table, it first clears the outdated information before adding the new, current information.

1. Select the type of postal or zip code data that you are uploading from the *Proximity Data Type* drop-down list. Possible options are:
   - *Canada*
   - *International*
   - *United States*
2. In the *Country Code* field, enter the country code associated with each uploaded zip or postal code record. Updates the country_cd field in the proximity_location table. This is a 3-position, alphanumeric code.
3. Use the *Browse* button next to the *File Name* field to identify the `CSV` file to upload.

   > **Note:**
   >
   > This file must match the *Proximity Data Type* selected, and must have a `CSV` extension.

4. Click *Upload*. Order Broker:
   - Places the file in a temporary location.
   - If this is an update, clears the records with matching country codes from the proximity_location table.
   - Adds a record to the proximity_location table for each record in the uploaded file, using the *Country Code* to update the country_cd field and the *Proximity Data Type* to update the country field.
   - When processing is complete, sends the *Proximity Upload Status Email* to the *Administrative email* address specified at the *Event Logging* screen.

Location of archived or error files: Order Broker saves a copy of each uploaded file in the FILE_STORAGE table, using a CONTAINER of OROB-ARCHIVES if the upload was successful; otherwise, if there were errors, the CONTAINER it uses is OROB-ERRORS.

Proximity CSV file layouts

United States File Layout

The required contents of the CSV file and the target fields in the proximity_location table for the United States are described below.

Field contents described below as *(empty)* are not passed, with no space included between the comma delimiters, as in the following sample entry:

Postal Code,City,StateCode,County,,CityTypeCode,,CityAliasName,Latitude,Longitude

> **Note:**
>
> Column headings are required.

Field Contents	Attributes	Target in proximity_location table
postal (zip) code	varchar, 10 positions	POSTAL_CD
city	varchar, 35 positions	CITY
state code	varchar, 3 positions	STATE_PROVINCE_CD
county	varchar, 35 positions	COUNTY_PARISH
(empty)	N/A	N/A
city type code	nchar, 1 position	CITY_TYPE_CD
(empty)	N/A	N/A
city alias name	varchar, 35 positions	CITY_ALIAS_NAME
latitude	numeric, 9.6 positions	LATITUDE
longitude	numeric, 9.6 positions	LONGITUDE

Canada File Layout

The required contents of the CSV file and the target fields in the proximity_location table for Canada are described below.

Field contents described below as *(empty)* are not passed, with no space included between the comma delimiters, as in the following sample entry:

Postal Code,City,State,,Latitude,Longitude

> **Note:**
>
> Column headings are required.

Field Contents	Attributes	Target in proximity_location table
postal code	varchar, 10 positions	POSTAL_CD
city	varchar, 35 positions	CITY
province (state)	varchar, 3 positions	STATE_PROVINCE_CD
(empty)	N/A	N/A

Field Contents	Attributes	Target in proximity_location table
latitude	numeric, 9.6 positions	LATITUDE
longitude	numeric, 9.6 positions	LONGITUDE

International File Layout

The required contents of the CSV file and the target fields in the proximity_location table for other countries are described below. A sample entry is:

Postal Code,Latitude,Longitude,City,StateCode

Note:

Column headings are required.

Field Contents	Attributes	Target in proximity_location table
postal code	varchar, 10 positions	POSTAL_CD
latitude	numeric, 9.6 positions	LATITUDE
longitude	numeric, 9.6 positions	LONGITUDE
city	varchar, 35 positions	CITY
state or province code	varchar, 3 positions	STATE_PROVINCE_CD

Troubleshooting

How to tell if the process is complete? Normally, Order Broker generates an email to the *Administrative email* address specified at the *Event Logging* screen when the process is complete, using the Locale specified at that screen to determine the language for the email.

Your upload process could fail if:

- You select a *Proximity Data Type* that does not match the selected *File Name*.
- You edit the `CSV` file in any way before you start the upload.
- You attempt to start an upload while another upload is still in process.

If the process fails, it is possible that proximity data will be unavailable for the country related to the `CSV` file, because the first thing that Order Broker does as part of the upload process is clear the related records from the proximity location table before rebuilding it. To correct this situation, begin the upload process again, using a complete `CSV` file.

If the upload remains in Uploaded status for longer than expected, contact your Oracle representative.

Proximity Upload Status Email

Order Broker generates the `Proximity Upload Status` email to the *Administrative email* address specified at the *Event Logging* screen at the completion of the proximity upload process if the Email Notifications flag for the *Proximity Data Load* option is set to *Administrator*. The Language specified at the Event Logging screen is used.

This email includes:

- The status of the upload, i.e, whether it completed successfully or if there were errors.
- The file name uploaded.
- The size of the uploaded file.
- The user ID who performed the upload process.
- The date and time the upload started and finished.
- The number of records read, created in the proximity_location table, and in error.

The language is based on the Language specified at the *Event Logging* screen.

The “from” address on the email is the *From Email* specified at the *Event Logging* screen.

Example:

```
****ATTENTION****

Your Proximity Upload has Completed Successfully.

Proximity Data Type: United States

File Name: generic_postal_code_data.csv

File Size: 3367903 bytes

Uploaded By: sample_usr

Date/Time File Uploaded: 2021-10-11 12:34:56.123

Date/Time Load Finished: 2021-10-11 12:34:59.234

# of Records Read: 8004

# of Records Loaded: 8004

# of Records In Error: 0

Please do not respond to this message.

-Order Broker
```

Fields at this screen

Field	Description
Entry fields:	
Proximity Data Type	Indicates the postal code type that you are uploading. Your selection updates the country field in the proximity_location table. Possible selections are: • *Canada* • *International* • *United States* Required.

Field	Description
Country Code	The country code associated with each uploaded zip or postal code record. Updates the country_cd field in the proximity_location table. Order Broker requires that store locations and locate items or submit order requests specify the country code that matches the proximity location record. For example, if you enter US here, then USA is not a valid entry at the *New Location* or *Edit Location* screens, or in the *locate items* request message or the *submit order message*. Alphanumeric, 3 positions; required.
File Name	The name of the `CSV` file containing the zip or postal code data. You can use the *Browse* button to select the file. Required.
Upload history fields:	
Date	The date and time of the upload process. The date and time are updated by the Order Broker server when you begin the upload process, and then again when the process is complete.
Proximity Data Type	The value selected from the *Proximity Data Type* drop-down box at the time you ran the upload.
Status	The status of the upload. Possible statuses are: • *Completed:* The entire upload and update completed without any errors. • *Completed with Errors:* The proximity upload completed, but one or more records could not be processed. • *Failed:* The process could not update the proximity location table, possibly because the file or filename being invalid, the .CSV file was deleted or moved, or there was an error during processing. • *Uploaded:* The `.CSV` file was uploaded, but the process has not finished updating the database. **Note:** See *Troubleshooting* for information on correcting problems.
File Name	The name of the uploaded file.
User ID	The ID of the user who ran the upload.

Systems

Purpose: Use the **Systems** screen to review or work with external databases or business entities that integrate with Order Broker for the Routing Engine (including, optionally, the Store Connect module) or Supplier Direct Fulfillment. For example, a system might be a database in Xstore or a company in Order Management System.

System relationships: See *Organization, System, and Location* for an overview of the data hierarchy in **Order Broker**, including products.

Created how? You need to use this screen to create each system that will integrate with Order Broker. See *Setting Up Data for the Routing Engine Module* or *Setting Up Data for the Supplier Direct Fulfillment Module* for more information.

How to display this screen: Select *Systems* from the *Home Screen* or from the *Systems Menu*.

> **Note:**
>
> Only users with *Systems* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
create a system	1. Optionally, select a different *organization* from the *Organization* drop-down box. See *Data Hierarchy* for more information on how systems are integrated within organizations. 2. 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. **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 or OCI IAM. You can use `STC_` (with an underscore rather than a hyphen) instead. 3. 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. 4. 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. 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. **Note:** If you click *Cancel* at the *System* screen after clicking *New*, the system is not created. *Order Management System integration:* The code representing the Order Management System system must match the setting of the OROB System (K50) system control value.

Option	Procedure
search for a system	Use any combination of the fields at the top of the screen to restrict the search results to matching systems: 1. Optionally, select a different *organization* from the from the *Organization* drop-down box to restrict your results to this organization. **Note:** You can select a blank organization to remove this field from your selection criteria. 2. Enter a full or partial system code in the *System* field to restrict your results to system codes starting with your entry. 3. Enter a full or partial name in the *Name* field to restrict your results to systems whose names contain your entry. 4. Click *Search*. **Case:** The System and Name are case-sensitive for searching; for example, an entry of `p` does not match a system code of `POS`.
select a system for review or maintenance	Click the edit icon ( ) to advance to the *System* screen. **Note:** If the *System* screen is already open in another tab, you advance to that screen, where the previously-selected system is displayed.
delete a system	Click the delete icon ( ) next to a system to delete the system from *Order Broker*. This option is available only if there is not an existing system product or *location* for the system.

Fields at this screen

Field	Description
Search/new fields:	

Field	Description
Organization	The *organization* associated with your *Default Shipping System* is selected by default, and the systems associated with that organization are displayed. See *organization*. **Note:** You must complete the *Preferences* screen for an organization before you can select it.
System	See *system*. System codes can be 1 to 10 positions in length, can include spaces and special characters, and must be unique. Case-sensitive for searching; for example, an entry of `p` does not match a system code of `POS`.
Name	The *Name* of a system. Names can be 1 to 40 positions in length and can include spaces and special characters. Case-sensitive for searching; for example, an entry of `p` does not match a system name of `POS`.
Results fields:	
Organization	See *organization*.
System	See *system*. Click a system code to advance to the *System* screen. **Note:** If the *System* screen is already open, you advance to the screen where the previously-selected system is displayed.
Name	The *Name* of a system.
Online	A check (✔) indicates that this is an *online system*; otherwise, it is an *offline system*.
Default	A check (✔) indicates that this is the *default system*.

Field	Description
Edit	Click the edit icon ( ) for a system to advance to the *System* screen. At that screen, the settings you can review or change include: • database connection settings for product and inventory updates • polling and status update settings • reserved statuses to subtract from the availably quantity **Note:** If the *System* screen is already open in another tab, you advance to that screen, where the previously-selected location is displayed.
Delete	Select the delete icon ( ) for a system to delete the system from Order Broker. You can delete the system if there are no existing system product or *location* records.

System

Purpose: Use the **System** screen to:

- set a *system* as the *default system* for the organization
- indicate whether the system is an *online system* or *offline system* (Routing Engine only)
- specify how to obtain interactive inventory information for an online system (Routing Engine only)
- specify whether the system requires status updates from assigned fulfilling locations (Routing Engine only)
- specify whether the Routing Engine should place a delivery or ship-for-pickup order in another location within the system when the first selected location rejects the order (Routing Engine only)
- specify whether to create more than one delivery, ship-for-pickup, or pickup order using the same order number and line number
- specify whether to subtract the quantities on orders in certain statuses in determining the available quantity for a product location (Routing Engine only)
- create a default vendor system so that you can create vendors to fulfill drop ship orders (Supplier Direct Fulfillment module only)
- create a default Store Connect system so that you can fulfill orders through the Store Connect module
- set configuration options for integration with Oracle Retail Integration Cloud Service (RICS) for order communication with Oracle Retail Merchandising

Foundation Cloud Service (RMFCS), as well as Oracle Retail Store Inventory Management (SIM) and Enterprise Inventory Cloud Service (EICS)

- set configuration options for integration with Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services to import locations, products, system products, and product locations

System relationships: See *Organization, System, and Location* for an overview of the data hierarchy in **Order Broker**, including products.

First system for an organization is flagged as the default: 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.

How to display this screen:

- Create a new system at the *Systems* screen

> **Note:**
>
> If you click *Cancel* after advancing to the **System** screen, the system is not created.

- Click the edit icon ( ) for an existing system code at the *Systems* screen

> **Note:**

- Only users with *Systems* authority can display this screen. See the *Role Wizard* for more information.
- If the **System** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previously-selected system displayed.

In this topic:

- *Options at this screen*
- *Flag a system as the organization default*
- *Configure a system for a RESTful web service connection for interactive inventory updates (URL)*
- *Configure a system to receive interactive updates from Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS)*
- *Configure a system to require a status update before flagging an order as Polled*
- *Configure a system to subtract the total reserved quantity when calculating the effective available quantity of an item in a location*
- *Prevent the Routing Engine from assigning delivery orders to another location in the originating system*
- *Flag a system as the Store Connect default*

- *Configure communication with Oracle Retail Integration Cloud Service (RICS) for order information*
- *Configure communication with Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services for location, product, system product, item image URL, barcode, and product location imports*
- *Configuring System Connections for Supported Integrations (Routing Engine)*
- *Order Management System Setup for Polling*
- *Fields at this screen*
- *Inventory tab*
- *Orders tab*
- *Reservation tab*
- *RICS Integration tab*
- *OCDS Integration tab*

Options at this screen

Option	Procedure
Flag a system as the organization default	Select the *Organization Default* flag and click *Save*. When you select this flag for a system, it clears the flag for the system that was previously the organization default. See the description of the *Organization Default* flag for background. **Note:** The system flagged as the Vendor Default should not be the default system for the organization.
Flag a system as the vendor default for the organization so that you can create vendors for the organization(Supplier Direct Fulfillment module only)	Select the *Vendor Default* flag and click *Save*. An organization can have only one vendor default system. Once you flag a system as the vendor default for an organization, you cannot change the vendor default assignment to a different system. **Note:** The system flagged as the Vendor Default should not be the default system for the organization. It is not necessary to specify any additional information for the vendor default system besides the organization, name, and this flag.

Option	Procedure
Configure a system for a RESTful web service connection for interactive inventory updates (URL) (Routing Engine only)	*Inventory tab* 1. Select the *Online* flag. 2. Select a *Connection Type* of *URL* to display the remaining *Inventory Service* fields in the *Inventory* tab. 3. Enter the *URL* where Order Broker should post the RESTful request messages. Your entry should end with /getAvailable. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*. 4. Enter the *Connection Timeout* indicating the number of seconds to wait for a response to the RESTful service requests to a remote, online system for an interactive inventory availability update. 5. Optionally, specify the *Failed Request Threshold* and *Failed Request Wait Time* if you would like to configure the interactive inventory update to time out temporarily after a specified number of failed requests. 6. Select an *Authentication Type* of either *Basic* or *OAuth*. **Note:** See *Manage External Application Access* for background on Oath. 7. If the authentication type is *Basic*, enter the *User ID* and *Password* to authenticate the inventory request to the system. 8. If the authentication type is *OAuth*, enter the *Client ID* and *Client Secret* to authenticate the inventory request to the system. 9. Click *Save*. **OMS integration:** See Work with Web Service Authentication (**WWSA**) in the Order Management System Classic View online help for information on setting up authentication for the CWServiceIn web service. If you enter a user ID at the **System** screen, it must be in all capital letters. Also, the *URL* you enter is typically in the format of `http://<SERVER>:1234/SerenadeSeam/sxrs/Inventory`, where `<SERVER>` is the server name and `1234` is the port number. See Generic Web Services in the Order Management System Classic View online help for more information. **For more information:** See *Additional Types of Import Processes (Other than RMFCS File Upload and OCDS or Merchandising Omni Services)* in the overview for background, and see the *RESTful Inventory Request and Response Messages* chapter in the Order

Option	Procedure
	Broker Operations Guide for details and more setup requirements.
Configure a system to receive interactive updates from Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS)	1. Select the *Online* flag. 2. Select a *Connection Type* of *SIM* to display the remaining *Inventory Service* fields in the *Inventory* tab. 3. Enter the *URL* where Order Broker should post the lookupAvailableInventoryAllStores messages to SIM. 4. Enter the *Connection Timeout* indicating the number of seconds to wait for a response from SIM to the available inventory lookup request. 5. Optionally, specify the *Failed Request Threshold* and *Failed Request Wait Time* if you would like to configure the interactive inventory update to time out temporarily after a specified number of failed requests. 6. Enter the *User ID* and *Password* to authenticate the inventory request to SIM. 7. Click *Save*. **For more information:** See *Additional Types of Import Processes (Other than RMFCS File Upload and OCDS or Merchandising Omni Services)* for a discussion of interactive inventory updates from SIM.
Configure a system to require a status update before flagging an order as Polled (Routing Engine only)	1. At the *Orders* tab, select the *Require Status Update* flag. 2. Enter the number of *Polling Retries* indicating how many times to include an order in the fulfillment response message to a fulfilling location before it is included in a notification email to the system administrator. You can enter any number from 1 to 99. 3. Optionally, enter one or more email addresses in the *System Ops Email* field to receive the *Order Broker Polling Status Email*. If you enter multiple email addresses, separate each with a semicolon (;). Order Broker verifies that the email addresses you enter are formatted correctly. 4. Click *Save*. **For more information:** See *Require Status Update for Assigned Orders?* for a discussion. **Note:** This setting does not apply to Store Connect locations, which do not use the fulfillment request and response message.

Option	Procedure
Configure a system to subtract the total reserved quantity when calculating the effective available quantity of an item in a location (Routing Engine only)	You can configure a system so that, when Order Broker determines the current available quantity of an item in a location, it subtracts the total quantity currently reserved for orders from the reported available quantity in order to determine the effective available quantity. This calculation helps you prevent overcommitting the inventory for the location. *Example:* The available quantity reported by a system for a product location is 37; however, the location is assigned to fulfill an order for 4 units, and the order is in *new_order* status, indicating that the location has not yet polled for new orders and been notified of this order assignment. As a result, the effective available quantity is actually 33 (37-4). You can configure the system to consider order lines in *new_order* status as reserved, and subtract the total quantity of order lines in this status from the reported available quantity to determine the effective available quantity for a fulfilling location. To configure the system for reserved quantity calculation: 1. At the *Reservation* tab, select the *Include Reserved* flag to make the *Reserved Statuses* flags available for selection. 2. Select each status that should be considered reserved, indicating that order lines in this status should be subtracted from the available quantity to avoid overcommitting the inventory. 3. Click *Save*. The screen displays a message indicating that it is updating the reserved quantities based on your selection. The number of product locations affected by the update determines how long this calculation takes to complete. 4. Processing the update does not affect any existing orders that are already assigned to a location for fulfillment. For example, an order is currently assigned to a location whose on-hand quantity of an item is *5*. After processing the update, the on-hand quantity of the item is now *-1*. However, the order remains assigned to the location and is not automatically rejected. **For more information:** See *Calculating the Available to Promise Quantity* for an overview.

Option	Procedure
Prevent the Routing Engine from assigning delivery orders to another location in the originating system (Routing Engine only)	You can configure a system so that, when a delivery order originates in a location within that system, the Routing Engine does not assign the order to another location that is also within the system. *Example:* System A includes locations DC1 and DC2, both distribution centers for the same enterprise sharing the same order database. When DC1 submits a delivery order, you do not want that order assigned to DC2. **Note:** This setting also prevents the *locate items* response from including locations within the system submitting the request. To prevent order assignment to a location within the system: 1. At the *Orders* tab, select the *Disallow shopping within same system* flag. 2. Click *Save*. **For more information:** See the *Disallow shopping within same system* flag.

Option	Procedure
Flag a system as the Store Connect default (Store Connect module only)	1. Select the Store Connect Default flag. 2. Use the *Reservation* tab to specify the statuses to include in the reserved quantity for each Store Connect location. Typically, the reserved statuses are *New Order*, *Accepted*, *Picked*, and *Polled*. 3. Click *Save*. **About the Store Connect system:** • Locations associated with the Store Connect system are eligible for assignment to store associates, who can log into the Store Connect module to work with orders assigned to these locations. • Orders assigned to these locations are ordinarily updated by store associates working through the Store Connect screens rather than through XML messages. • Store Connect locations do not poll for newly assigned orders; instead, a background job updates new orders to polled status, making the orders available for store associates to work with, based on your settings at the *Store Connect Preferences* screen. • Order Broker generates email notifications to store locations associated with this system when new orders are ready for processing. • You can import barcodes from RMFCS for this system. See *Importing UPC Barcodes through File Storage API* for background. **For more information:** See the *Store Connect Overview* for background. **Note:** Once you create any locations for the Store Connect system, you cannot change the setting of this flag for the Store Connect system or for any other systems in the organization.
Configure communication with Oracle Retail Integration Cloud Service (RICS) for order information	1. Select the *RICS Integration* tab. 2. Use this tab to specify settings for communication with Oracle Retail Integration Cloud Service (RICS) to communicate order information between Order Broker and Oracle Retail Merchandising Foundation Cloud Service (RMFCS), as well as Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS). **For more information:** See the *RICS Integration tab*.

Option	Procedure
Configure communication with Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services for location, product, system product, item image URL, barcode, and product location imports	1. Select the *OCDS Integration* tab. 2. Use this tab to specify settings for communication with Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services to obtain location, product, system product, and product location information. **For more information:** See the *OCDS Integration tab*.

Configuring System Connections for Supported Integrations (Routing Engine)

See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for an overview, and see the *Schedule Jobs* screen for additional required setup. The steps to complete this screen are listed under *Options at this screen*.

Also, see:

- *Configure a system for a RESTful web service connection for interactive inventory updates (URL)* for information on how to integrate with Order Management System for interactive inventory updates.
- *Configure a system to receive interactive updates from Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS)* for information on how to integrate with SIM or EICS for interactive inventory updates.
- *Configure communication with Oracle Retail Integration Cloud Service (RICS) for order information*.
- *Configure communication with Omnichannel Cloud Data Service for location, product, system product, and product location imports*.

Order Management System Setup for Polling

If the Routing Engine sends orders to Order Management System for fulfillment, your setup related to requiring status updates should be consistent at the **System** screen in Order Broker and for the related system control value in Order Management System:

Setup	Status Update Required	No Status Update Required
Require Status Update at the **System** screen in Order Broker:	selected; also, complete the *Polling Retries* and *System Ops Email* fields	unselected
Re-polling for Orders Brokered to OROMS or Re-polling for Orders Brokered to OROMS system control value in Order Management System (labeled Re-polling at the **Order Broker Values**(K15) screen):	selected	unselected

For more information: See *Require Status Update for Assigned Orders?* for a discussion.

Fields at this screen

Update any of the fields described below and click *Save*, or click *Cancel* to return to the *Systems* screen without making any changes. See the *Fields at this screen* for more information.

> **Note:**
>
> If you are creating a new system, clicking *Cancel* prevents the creation.

Field	Description
Organization	See *organization*.
System	See *system*. The system code can be 1 to 10 positions in length, can include special characters, and must be unique in Order Broker. Required if you are creating a system; otherwise, display-only. *Order Management System integration:* The code representing the Order Management System system must match the setting of the OROB System (K50) system control value. However, names for systems do not need to be the same as the Order Management System company descriptions.
System fields	
Name	The *Name* of a system. System names can be 1 to 40 positions in length and can include special characters. Required.
Organization Default	Select this check box to flag the system as the *default system* for the organization. Products in Order Broker can have relationships with every integrated system, but they are defined by the default system. You should load the Order Broker database with the default system's products first, and then create system products for each additional integrated system. An organization can have only one default system. *First system 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. **Note:** The system flagged as the Vendor Default should not be the default system for the organization.

Field	Description
Vendor Default	Select this checkbox to flag the system as the vendor default for the organization. A vendor default system is required before you can create any vendors for the organization. An organization can have only one vendor default system. When you select this flag for a system, it clears the flag for the system that was previously the vendor default. **Note:** The system flagged as the Vendor Default should not be the default system for the organization. The vendor system cannot originate sales orders or purchase orders. It is not necessary to specify any additional information for the vendor default system besides the organization, name, and this flag. Used for the Supplier Direct Fulfillment module only. Available if Use Vendor Portal is selected at the *Tenant* screen.

Field	Description
Store Connect Default	Select this checkbox to flag the system as the Store Connect system. **About the Store Connect system:** • Locations associated with the Store Connect system are eligible for assignment to store associates, who can log into the Store Connect module to work with orders assigned to these locations. • Delivery and pickup orders assigned to these locations are ordinarily updated by store associates working through the Store Connect screens rather than through XML messages. • You use the *Store Connect Preferences* screen to set up preferences related strictly to Store Connect, as opposed to the general Routing Engine preferences you set up at the **Preferences** screen. • Store Connect locations do not poll for newly assigned delivery or pickup orders; instead, a background job updates new orders to polled status, making the orders available for store associates to work with. Your settings at the *Store Connect Preferences* screen control when the orders are updated to polled status. • Order Broker generates an email notification to the store location when new delivery or pickup orders are polled. • Optionally, Order Broker generates pickup-ready notification emails to customers for pickup orders or shipment notification emails for shipped delivery orders. • The Store Connect system cannot originate orders. • You can import barcodes from RMFCS for this system. See *Importing UPC Barcodes through File Storage API* for background. **For more information:** See the *Store Connect Overview* for background. **Note:** Once you create any locations for the Store Connect system, you cannot change the setting of this flag for the Store Connect system or for any other systems in the organization. Used for the Store Connect module only. Available if Use Store Connect is selected at the *Tenant-Admin* screen.
Inventory tab	Available only with the Routing Engine module.

Field	Description
Online	Select this check box to indicate that this is an online system, meaning that Order Broker requests interactive inventory updates when it receives a *locate items* request, *product availability search* request, or needs to select a fulfilling location for a delivery order, either as part of initial order creation or through the status update process *About online processing:* If Order Broker is unable to retrieve an interactive update from the system, it uses the available quantity stored in the Order Broker database (*offline inventory*). This available quantity is updated either through a recent online inventory inquiry, or through the most recent inventory download from the system. Typically, inventory levels in the Order Broker database are updated daily, or whenever scheduled by your systems administrator. See *Example: Searching for Items* for more information. *Offline system:* If the check box is not selected, this is on offline system, meaning that Order Broker does not request interactive inventory updates; instead, it relies on the available quantity stored in the Order Broker database (*offline inventory*). Typically, inventory levels in the Order Broker database are updated daily, or whenever scheduled by your system administrator. *Changing to offline:* You can temporarily change a system from online to offline if you know that communication with the system will not be available and you would like to avoid unnecessary processing time for locate items requests. When you clear the checkbox, the *Inventory Service* information is retained so that you will not need to specify it again if the system goes back online. *Changing to online:* When you change a system to online, you need to specify the URL and other inventory service information, described below. **For more information:** See *Configure a system for a RESTful web service connection for interactive inventory updates (URL)* or *Configure a system to receive interactive updates from Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS)* for setup steps.
Inventory Qty Export	Indicates whether to include updated product locations from this system in the pipe-delimited file generated when you run the inventory quantity export for any system in the organization. This setting does not control whether a background job monitors changes that could affect probability rules calculations. See *Inventory Quantity Export* for information on running the export.

Field	Description
Track Fulfilled Quantity	Indicates whether to track the fulfilled quantity for a product location when you ship a delivery order (status is fulfilled), transfer a ship-for-pickup order (status is intransit), or when a pickup order is picked up (status is fulfilled): • *Do Not Track Fulfilled:* Do not update a product location's fulfilled quantity when a delivery or pickup order is fulfilled, or when a ship-for-pickup order is intransit. Used when? You might use this setting for a system that tracks its own inventory levels, tracks order fulfillments through status inquiry requests, and keeps Order Broker product locations in sync through interactive inventory updates. In this case, you would not typically use the *Fulfilled Inventory Export*. **Note:** If you change to *Do Not Track Fulfilled* from another setting, the fulfilled quantities for product locations within the system are reset to 0. • *Reset During Inventory Export:* Update a product location's fulfilled quantity when a delivery or pickup order is fulfilled, or when a ship-for-pickup order is intransit. When the *Fulfilled Inventory Export* runs, reset the product location's fulfilled quantity to 0, and subtract the fulfilled quantity from the product location's available quantity. These updates leave the product location's *available to promise quantity* unchanged (available to promise = available quantity - *reserved quantity* + fulfilled quantity). Used when? You might use this setting for a system such as Store Connect, that typically relies on Order Broker to manage order activity, and uses the fulfilled inventory export for updates on fulfilled orders. Tracking the fulfilled quantity enables you to avoid overstating the actual quantity available for orders. **Note:** If you select this setting, you should have at least one day selected for the *Fulfilled Inventory Export*. • *Reset During Product Import:* Update a product location's fulfilled quantity when a delivery or pickup order is fulfilled, or when a ship-for-pickup order is intransit. When the *import process* runs, reset the product location's fulfilled quantity to 0. Do not subtract the fulfilled quantity from the available quantity; instead, update the product location's inventory information with the current information received in the import, if any. If the product location is not included in the import, the fulfilled quantity is still reset to 0. **Note:** The fulfilled quantity is not reset through the *Incremental Inventory Import*, only through the *Product Import*. **Used when?** You might use this setting for a system that periodically updates inventory levels based on activity outside of Order Broker and also receives information on fulfilled orders through status update requests, but uses the fulfilled quantity to calculate a more accurate *available to promise quantity* in the interval between product imports.

Field	Description
	Note: The above settings are available for selection regardless of whether the system is flagged as Online. **For more information:** See below for examples of the calculations for each setting. **Examples of fulfilled quantity updates** *Track Fulfilled Quantity set to Do Not Track Fulfilled:* A product location has: • Available: 10 • Reserved: 0 • Fulfilled: 0 • Available to Promise: 10 The location is assigned a new delivery order for a quantity of 2: • Available: 10 • Reserved: 2 • Fulfilled: 0 • Available to Promise: 8 The order is fulfilled: • Available: 10 • Reserved: 0 • Fulfilled: 0 • Available to Promise: 10 The next time the system updates the product location through a periodic product and inventory import or an interactive inventory update, it resets the available quantity to the current level. *Track Fulfilled Quantity set to Reset During Inventory Export:* A product location has: • Available: 10 • Reserved: 0 • Fulfilled: 0 • Available to Promise: 10 The location is assigned a new delivery order for a quantity of 2: • Available: 10 • Reserved: 2 • Fulfilled: 0 • Available to Promise: 8 The order is fulfilled: • Available: 10 • Reserved: 0 • Fulfilled: 2 • Available to Promise: 8 The *Fulfilled Inventory Export* runs: • Available: 8 • Reserved: 0 • Fulfilled: 0

Field	Description
	• Available to Promise: 8 The next time the system updates the product location through a periodic product and inventory import, it resets the available quantity to the current level if it is different. *Track Fulfilled Quantity set to Reset During Product Import:* A product location has: • Available: 10 • Reserved: 0 • Fulfilled: 0 • Available to Promise: 10 The location is assigned a new delivery order for a quantity of 2: • Available: 10 • Reserved: 2 • Fulfilled: 0 • Available to Promise: 8 The order is fulfilled: • Available: 10 • Reserved: 0 • Fulfilled: 2 • Available to Promise: 8 If the *Fulfilled Inventory Export* runs, there is no update. The product and inventory import runs, passing an available quantity of 3 as a result of additional activity within the system: • Available: 3 • Reserved: 0 • Fulfilled: 0 • Available to Promise: 3 The fulfilled quantity is not subtracted from the available quantity, since the product and inventory import provides the most current inventory level based on all activity.

Field	Description
Connection Type	For an *Online* system, select: 1. *SIM* to have Order Broker send a lookupAvailableInventoryAllStores request to Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS) for interactive inventory updates for requested items. To use the interactive inventory requests, you need to: 2. Select the *Online* flag. 3. Complete the required *Inventory Service* fields (*URL*, *Connection Timeout*, *User ID*, and *Password*. 4. Optionally complete the *Failed Request Threshold* and *Failed Request Wait Time* fields, and, 5. *URL* to have Order Broker send a RESTful service call to the remote system for interactive inventory updates for requested items. To use interactive inventory requests, you need to: 6. Select the *Online* flag. 7. Complete the required *Inventory Service* fields (*URL*, *Connection Timeout*, *Authentication Type*; *User ID*, and *Password* (for Basic authentication), or *Client ID* and *Client Secret* (for OAuth). 8. Optionally, complete the *Failed Request Threshold* and *Failed Request Wait Time* fields, and Leave this field set to *None* for an offline system. **For more information:** See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* in the overview.
Inventory Service	The remaining fields on the *Inventory* tab enable Order Broker to retrieve interactive product and inventory information when the *Connection Type* is set to *SIM* or *URL*, and the inventory hasn't been updated in the time frame defined at the **Preferences** screen. The interactive inventory updates take place only if the *Online* flag is selected. *Displayed and required when?* The *Connection Type* setting controls which fields are displayed and required. See *Connection Type*, above, for information on completing the fields on this tab, and see below for information on the individual fields.

Field	Description
URL	The URL where Order Broker should send RESTful service requests to a remote, online system for real-time inventory updates for requested items, or the URL to use for integration with SIM or EICS. This field is available only if the Connection Type is set to *URL* or *SIM*, and is required if the Online flag is selected. If a URL is specified, then additional fields are displayed and required. See the Connection Type for more information. Your entry should end with `/getAvailable` if the Connection Type is set to *URL*. **Note:** The Inventory Request/Response setting at the Event Logging screen controls whether to log the inventory update request and response messages. **OMS integration:** See the Work with Web Service Authentication (**WWSA**) menu option in the Order Management System Classic View online help for information on setting up web service authentication. If you use the *Basic* Authentication Type, the user ID you enter at the **System** screen must be in all capital letters. Also, the URL is typically in the format of `http://<SERVER>:1234/SerenadeSeam/sxrs/Inventory/getAvailable`, where `<SERVER>` is the server name and `1234` is the port number. See Generic Web Services in the Order Management System online help for more information. **Note:** Oracle staff need to make sure that this URL is added to the allow list. **For more information:** See the *RESTful Inventory Request and Response Messages* chapter in the Order Broker Operations Guide for details and more setup requirements.
Connection Timeout	Defines: • *URL:* The number of seconds to wait for a response to the RESTful service requests to a remote, online system for an interactive inventory update before timing out and using offline inventory information from the Order Broker database. Defaults to *30* seconds. • *SIM:* The number of seconds to wait for a response to the lookupAvailableInventoryAllStores request to SIM or EICS before timing out and using offline information from the Order Broker database. Defaults to *30* seconds. A value of 1 or higher in this field is required if a Connection Type of *URL* or *SIM* is specified.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Failed Request Threshold</td><td>The number of consecutive failed interactive inventory request attempts that, if exceeded, should trigger putting the inventory requests for the system in a wait time. For example, if this field is set to 5, and 6 requests in a row fail to get a response, interactive inventory requests are halted for the defined wait time. Can be set to 0, indicating that failed requests are not evaluated, or from 1 to 10000 if failed requests should be evaluated. Defaults to 0.
This field is available only if a Connection Type of URL or SIM is specified.</td></tr>
<tr><td>Failed Request Wait Time</td><td>The number of minutes to wait after the defined number of failed requests have been exceeded for the system. For example, if this field is set to 10, interactive inventory requests for the system are halted for 10 minutes. Can be set to 0 only if the Failed Request Threshold is also set to 0; otherwise, can be set from 1 to 60. Defaults to 0.
This field is available only if a Connection Type of URL or SIM is specified.</td></tr>
<tr><td>Authentication Type</td><td>Indicates whether to use Basic or OAuth authentication. Defaults to Basic. This field is available only if a Connection Type of URL is specified.
When the authentication type is set to Basic, you need to enter:
• User ID
• Password
When the authentication type is set to OAuth, you can select the Use Tenant Client ID flag, or enter:
• Client ID
• Client Secret

Note:
Select OAuth only if the integrating system supports it.

See Manage External Application Access for background.</td></tr>
<tr><td>Use Tenant Client ID</td><td>Leave this flag selected in order to use the Client ID and the Client Secret defined at the Tenant-Admin screen when using OAuth for authentication. This field is available when the Connection Type is URL and the Authentication Type is OAuth. In this case, the current setting of the Client ID from the Tenant-Admin screen is displayed to the right; otherwise, if the Identity Cloud Service Settings setup has not been completed, a message indicates No value entered.
If this flag is selected, then the Client ID and Client Secret, if any, entered here are not used.</td></tr>
<tr><td>Query Time Out</td><td>Not currently implemented.</td></tr>
<tr><td>Server</td><td>Not currently implemented.</td></tr>
<tr><td>Database</td><td>Not currently implemented.</td></tr>
</table>

Field	Description
User ID	If the *Connection Type* is *URL:* A valid user ID required to authenticate the inventory update request message to the system. **Note:** This field is available only when the *Authentication Type* for a URL connection is set to *Basic*; otherwise, the *Client ID* field is available. For integration with Order Management System (*URL*), you need to use the Work with Web Service Authentication (**WWSA**) menu option to set up a corresponding user ID and password for the CWServiceIn web service. The user ID you enter at the **System** screen must be in all capital letters. If the *Connection Type* is *SIM:* A valid user ID required to authenticate the lookupAvailableInventoryAllStores request message to SIM or EICS. This field is available only if the *Connection Type* is set to *URL* or *SIM*. Required if the *Online* flag is selected, or if a *URL* is specified.
Password	The valid password for the user ID. Your entry is masked on the screen and encrypted in the database. This field is available only if the *Connection Type* is set to *URL* and the *Authentication Type* is set to *Basic*, or if the *Connection Type* is set to *SIM*. Required if the *Online* flag is selected, or if a *URL* is specified.
Client ID	Identifies Order Broker as a client application for authentication using OAuth. This field is available only when the *Connection Type* is *URL* and the *Authentication Type* is *OAuth*. Required if the *Authentication Type* is *OAuth* and the *Use Tenant Client ID* flag is not selected. For integration with Order Management System (*URL*), you need to use the Work with Web Service Authentication (**WWSA**) menu option to set up a corresponding client ID and client secret for the CWServiceIn web service. The client ID you enter at the **System** screen must be in all capital letters. **For more information:** See *Manage External Application Access* for background on OAuth authentication.
Client Secret	The client secret to authenticate Order Broker as a client application in order to obtain a token. This field is available only when the *Connection Type* is *URL* and the *Authentication Type* is *OAuth*. Required if the *Authentication Type* is *OAuth* and the *Use Tenant Client ID* flag is not selected. **For more information:** See *Manage External Application Access* for background on OAuth authentication.
Class	Not currently implemented.
Orders tab	Use these fields to control: • Whether the Routing Engine can assign an order to another location within the system • Whether the Routing Engine continues to include a new order in the fulfillments response to the assigned fulfilling location until the location sends a status update. See *Require Status Update for Assigned Orders?* for a discussion. Available only with the Routing Engine module.

Field	Description
Order Broker Shopping	
Disallow shopping within same system	Indicates whether the Routing Engine should assign a ship-for-pickup or delivery order to another location in the same system. If the *Disallow shopping within same system* flag is: • *Selected:* The Routing Engine does not assign an order to another location within the same system that submitted the order. The order can be assigned to a location in a different system, based on the rules set up at the **Preferences** screen; otherwise, it is unfulfillable. Also, the *locate items* response does not include any locations within the system submitting the request, unless the *requested location* is within the same system. **Note:** If the *submit order message* specifies a location within the same system, the order is created in the specified location regardless of the setting of this flag. • *Unselected (default):* The Routing Engine can assign the order to another location within the system, based on the rules set up at the **Preferences** screen. Also, the *locate items* response can include locations within the system submitting the request. **When to disallow shopping?** You might use this field to disallow shopping if your OMS system, such as Order Management System, supports multiple warehouses and each warehouse is represented as a separate location in Order Broker.
Order Fulfillment	**Order Management System setup:** If you send orders to Order Management System warehouses for fulfillment, check *Order Management System Setup for Polling* for more information.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Require Status Update</td><td>
Fulfillment response message: Indicates whether to automatically flag an order or line as Polled when it is included in the fulfillment response message, or to continue including it in the fulfillments response message until the assigned location sends a status update message accepting the order:

Selected = Order Broker continues to send an order or line in the fulfillments response message when the assigned fulfilling location polls for new orders until the order is flagged as polled:

The order is flagged as polled when the location sends a status update message to with a status of polled or accepted.
Order Broker uses the order’s or line’s Poll Count field to track the number of times it has been included in the fulfillments response message.
When the order’s or line’s Poll Count exceeds the Polling Retries specified for the system, Order Broker includes the order in the Order Broker Polling Status Email sent to the System Ops Email specified for the system. Each item’s current Poll Count is indicated on the Order screen.

Possible risk: With this setting, there is a potential risk that an order could be created twice in the integrating system if, for example, that system does not complete creating the new orders in the fulfillments response message and sending the status update messages for them before it sends a new fulfillments request message to Order Broker.
Unselected (default) = Flag the order or line as Polled when it is included in a fulfillment response message to the location; do not include the order or line more than once.
Possible risk: With this setting, there is a potential risk that an order might not be created in the integrating system if, for example, the integrating system does not receive the fulfillments response, or fails to create all orders in the response.
Note:
This setting does not apply to Store Connect locations, which do not use the fulfillment request and response message. Also, it does not apply to orders fulfilled through Order Fulfillment through RICS Integration.

Intransit response message: If the Require Status Update flag is:

Selected = the Routing Engine continues to include a ship-for-pickup order in the intransit response message to a pickup location or system, until the location or system sends a status update indicating that the order or order line is intransit polled.
Unselected = the Routing Engine includes each ship-for-pickup order or line just once in the intransit response message to a pickup location, and then changes the status to intransit polled.

Polling count: The polling count for the order line is initially set to 0 when it is in transit. Each time the Routing Engine includes an order or line in the intransit response message, it increases the order line’s Poll Count.
Unlike the rules for the fulfillment response, the rules for the intransit response do not include generating the Order Broker Polling Status Email when an in transit order exceeds the Polling Retries specified for the system.
</td></tr>
</table>

Field	Description
	Note: The setting of this flag does not affect *Order Fulfillment through RICS Integration*.
Use Requesting System Line Number in Status Update	Controls how the `line_no` in the status update request identifies the order line to update when the *Allow Split Line* preference is selected but the *Allow Partial Updates* preference is not. *Applies to specific configuration only:* The `line_no` is interpreted as the originating system's line number ONLY if: • the *Allow Split Order* and *Allow Split Line* preferences are selected, AND • the *Allow Partial Updates* preference is unselected, AND • the request message is from the originating location for the order, AND • this flag is selected Otherwise, the `line_no` identifies the current line number in Order Broker. *Example:* The configuration described above is in place. The originating location submits a status update request to cancel line 1, referencing its own line number rather than the Order Broker line number. Line 1 originated with 4 units, but has since split across 2 locations, resulting in lines 1 and 2 in Order Broker for 2 units each, with an originating line number of 1. The result is that the update request cancels both order lines. Otherwise, if the configuration described above is not in place, or if the originating location did not submit the status request, only the first of the two lines is canceled. When the organization has *Allow Split Line* selected and *Allow Partial Updates* unselected, this flag should be: • *selected* for a system such as Order Management System, which includes its line number in the status update request • *unselected* (default) for a system such as Xstore, which includes the Order Broker line number in the status update request **Note:** When the *Allow Partial Updates* preference is selected, the requesting system needs to first obtain the current line numbers in Order Broker before submitting a status update.

Field	Description
Polling Retries	The number of times to include the order or line in a fulfillment response message before including the order in the *Order Broker Polling Status Email*. • If the Require Status Update flag is: • 1. *Selected:* You can enter any number from 1 to 99 2. *Unselected:* Enter 0 Required. Order Broker tracks the number of retries in the Poll Count field at the *Order* screen. **Note:** This setting does not apply to Store Connect locations, which do not use the fulfillment request and response message.
System Ops Email	The email address where Order Broker should send the notification email listing orders that have not been acknowledged after the number of Polling Retries has been reached. If you enter multiple email addresses, separate each with a semicolon (;). Order Broker verifies that the email address you enter are formatted correctly. Optional, even if the Require Status Update flag is selected.
Reservation tab	Use this tab to indicate the order or order line statuses to subtract from a location's available quantity in order to determine the quantity that is actually available to fulfill new orders. Typically, the reserved statuses for a Store Connect system are *New Order*, *Accepted*, *Picked*, and *Polled*. **Inventory quantity export:** Changes to the reserved statuses at this tab do not trigger probability rule calculation for the inventory quantity web service, as described under *Tracking Probability Rules for Incremental Updates on Inventory Availability*; however, these changes do factor into the calculation for the *Full Overlay Inventory Quantity Extract File*. See *Probability Rules Update and Incremental Quantity Web Service* for background. Available only with the Routing Engine module.
Include Reserved	Select this check box to have Order Broker subtract reserved order lines from the reported available quantity for a product location. This calculation helps you prevent overcommitting inventory when assigning orders, responding to *locate items* requests, or evaluating selected fulfilling locations. If this check box is selected, the **Reserved Statuses** listed below are available for selection. Once you select any statuses and click *update*, Order Broker calculates the total reserved quantity for each product location in the system currently assigned to any selected status. **For more information:** See *Calculating the Available to Promise Quantity* for an overview.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Reserved Statuses</td><td>These statuses are available for selection if you select the Include Reserved checkbox. Select each status that indicates that inventory is reserved for an open order line and should not be assigned to new orders or listed in the LocateItems response message.
For more information: See Calculating the Available to Promise Quantity for an overview.
Possible statuses are:
New Order
Accepted
Canceled
Picked
Fulfilled
Unfulfillable
Polled
Posted
Processed
Verified
Intransit
Intransit Polled
Received
Partially Fulfilled
Typically, reserved statuses for your Store Connect system are New_Order, Accepted, Polled, and Picked.</td></tr>
<tr><td>RICS Integration tab</td><td>Use this tab to set up integration with the Oracle Retail Integration Cloud Service (RICS) to communicate order information between Order Broker and: Oracle Retail Merchandising Foundation Cloud Service (RMFCS), as well as Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS).
For more information: See Order Fulfillment through RICS Integration for background.</td></tr>
<tr><td>Online</td><td>Select this check box to indicate that this is a system is:
Oracle Retail Merchandising Foundation Cloud Service (RMFCS), or
Oracle Retail Store Inventory Management (SIM); or
Enterprise Inventory Cloud Service (EICS)
Order Broker integrates with these systems through the Oracle Retail Integration Cloud Service (RICS).
When you select this check box, you need to specify the Outbound Orders Service information, described below.
For more information: See Order Fulfillment through RICS Integration for background.</td></tr>
<tr><td>Send Release Reservation Inventory Message</td><td>Select this check box to send an order cancellation message through RICS when an order is rejected or canceled.</td></tr>
</table>

Field	Description
Hold Under Review Orders	Select this check box to post an order through RICS to RMFCS or SIM only when the order is not currently held for review, based on its *Under Review* flag. When you clear the *Under Review* flag for the order, it is then posted automatically. See *Order Fulfillment through RICS Integration* for background. **Note:** This flag should be selected.
Outbound Orders Service	Use these fields to define how to integrate with Oracle Retail Integration Cloud Service (RICS) in order to communicate order information with Oracle Retail Merchandising Foundation Cloud Service (RMFCS), as well as Oracle Retail Store Inventory Management (SIM) or Enterprise Inventory Cloud Service (EICS). These fields are required if the *Online* flag is selected at the RICS Integration tab.
URL	The URL for RICS. This is the URL where Order Broker should send order-related and interactive inventory update messages for communication with RMFCS, EICS, or SIM. This field is required if the *Online* flag is selected. Also, if the *Online* flag is selected, then the *Connection Timeout*, *User ID*, and *Password* are also required. **Note:** The URL might be similar to `https://SERVERNAME:47220/rib-oms-services-web/resources/publisher`. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Connection Timeout	Defines the number of seconds to wait for a response from RICS before timing out. Defaults to *30* seconds. Numeric, 9 positions.

Field	Description
Authentication Type	Enables you to select an authentication type of *Basic* or *OAuth*. Your selection in this field controls the additional fields displayed on this tab, described below. **Note:** OAuth support is available with Oracle Retail Merchandising Foundation Cloud Service (RMFCS) application version 21.0 or above. Older versions will continue to support Basic authentication.
User ID	A valid user ID required to authenticate messages to RICS. This field is available only when the *Authentication Type* is *Basic*. Required if using basic authentication. Alphanumeric, 50 positions. **Note:** This user ID needs to have the Operator or Admin role in RIB in order to support sending `stop` and `start` requests at the beginning and end of the *Inventory Quantity Export*, indicating to pause *Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)* while the export runs. It then generates a request to resume sending the update message when the update and export process is complete.
Password	The valid password for the user ID. Your entry is masked on the screen and encrypted in the database. This field is available only when the *Authentication Type* is *Basic*. Alphanumeric, 50 positions.
IDCS Endpoint URL	The URL to use when requesting the token for OAuth. Required if using OAuth. Alphanumeric, up to 255 positions. This field is available only when the *Authentication Type* is *OAuth*.
Scope	Defines the limits that control where the token can be used, for example: `urn:opc:idm:myscopes`. This field is available only when the *Authentication Type* is *OAuth*. Your Oracle representative can tell you whether to specify a Scope here. If you do not specify a Scope, the default applies.
Client ID	The client ID to use when requesting the token for OAuth. Required if using OAuth. This field is available only when the *Authentication Type* is *OAuth*.
Client Secret	The client secret to use when requesting the token for OAuth. Required if using OAuth. This field is available only when the *Authentication Type* is *OAuth*.

Field	Description
OCDS Integration tab	Use this tab to set up integration with the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services to import warehouse or store location, product, and product location information from Oracle Retail Merchandising Foundation Cloud Service (RMFCS). When you use ODCS or Merchandising Omni Services for these imports, Order Broker generates web service requests for this information rather than processing an upload file. **Note:** If any of the URLs on this tab are flagged as active, the OCDS or Merchandising Omni Services import process is run rather than any other type of product or location import when you submit an import through the *Schedule Jobs* screen. **On this tab:** • *OCDS Store location import fields* • *OCDS Warehouse location import fields* • *OCDS Products import fields* • *OCDS Product Barcode import fields* • *OCDS Product Image import fields* • *OCDS Store inventory import fields* • *OCDS Warehouse inventory import fields* **For more information:** See: • *OCDS or Merchandising Omni Services Imports* and *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS) or Merchandising Omni Services* for an overview and mapping details. • *Schedule Jobs* screen for information on scheduling the imports or running them on demand.
OCDS Store location import fields	The first line on this tab includes the following three fields, which are related to the import of store location information.
Store Location URL	The endpoint to use when requesting store location information from OCDS or Merchandising Omni Services, for example, `https://SERVER/ords/ocdspdb/omnichannel/v1/location/retailstore`, where `SERVER` is the name of the server. Alphanumeric, 255 positions. Required if the Active flag is selected for store locations. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.

Field	Description
Active (store location)	Select this flag to enable importing store locations through OCDS or Merchandising Omni Services. If this flag is selected, the Store Location URL and Default Location Type for stores are also required.
Default Location Type (store)	Select the code for a store location type to associate with the store locations imported through the Store Location URL. All location types in your organization with a Category of *Store* are available for selection. Required if the Active flag is selected for store locations. **Note:** If you change this setting after initially importing store locations, existing store location records are not updated.
OCDS Warehouse location import fields	The second line on this tab includes the following three fields, which are related to the import of virtual warehouse location information. **Virtual warehouses only:** The OCDS or Merchandising Omni Services integration imports virtual warehouses only; it does not import physical warehouses. Because the warehouses are virtual locations, the address information that is imported is from the physical warehouse associated with the virtual warehouse.
Warehouse Location URL	The endpoint to use when requesting virtual warehouse location information from OCDS or Merchandising Omni Services, for example, `https://SERVER/ords/ocdspdb/omnichannel/v1/location/warehouse`, where `SERVER` is the name of the server. Alphanumeric, 255 positions. Required if the Active flag is selected for warehouse locations. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Active (warehouse location)	Select this flag to enable importing virtual warehouse locations through OCDS or Merchandising Omni Services. If this flag is selected, the Warehouse Location URL and Default Location Type for warehouses are also required.

Field	Description
Default Location Type (warehouse, unlabeled)	Select the code for a warehouse location type to associate with the virtual warehouse locations imported through the Warehouse Location URL. All location types in your organization with a Category of *Warehouse* are available for selection. Required if the Active flag is selected for warehouse locations. **Note:** If you change this setting after initially importing warehouse locations, existing warehouse location records are not updated.
OCDS Products import fields	The third line on this tab includes the following two fields, which are related to the import of product information.
Products URL	The endpoint to use when requesting product information from OCDS or Merchandising Omni Services, for example, `https://SERVER/ords/ocdspdb/omnichannel/v2/item`, where `SERVER` is the name of the server. Alphanumeric, 255 positions. Required if the Active flag is selected for products. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Active (products)	Select this flag to enable importing products and system products through OCDS or Merchandising Omni Services. If this flag is selected, the Products URL is also required.
OCDS Product barcode import fields	The fourth line on this tab includes the following two fields, which are related to the import of product barcode information.
Product Barcode URL	The endpoint to use when requesting product barcode information from OCDS or Merchandising Omni Services, for example, `https://SERVER/ords/ocdspdb/omnichannel/v2/item/upc`, where `SERVER` is the name of the server. Alphanumeric, 255 positions. Required if the Active flag is selected for product barcodes. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.

Field	Description
Active (barcodes)	Select this flag to enable importing product barcodes through OCDS or Merchandising Omni Services. If this flag is selected, the Products Barcode URL is also required.
OCDS Product image import fields	The fourth line on this tab includes the following two fields, which are related to the import of product image information. **Note:** These fields should be completed only for the default system in the organization. The *Active* flag can be selected only for the default system.
Product Image URL	The endpoint to use when requesting product image information from OCDS or Merchandising Omni Services, for example, `https://SERVER/ords/ocdspdb/omnichannel/v2/item/image`, where `SERVER` is the name of the server. Alphanumeric, 255 positions. Required if the Active flag is selected for product images. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Active (images)	Select this flag to enable importing product images through OCDS or Merchandising Omni Services. You can select this flag only for the default system for the organization. If this flag is selected, the Products Image URL is also required.
OCDS Store inventory import fields	The fourth line on this tab includes the following two fields, which are related to the import of product location information from store locations.
Store Inventory URL	The endpoint to use when requesting product location information for store locations from OCDS or Merchandising Omni Services, for example, `https://SERVER/ords/ocdspdb/omnichannel/v2/inventory/Store`, where `SERVER` is the name of the server. Alphanumeric, 255 positions. Required if the Active flag is selected for store inventory. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Active(store inventory)	Select this flag to enable importing products and system products in store locations through OCDS or Merchandising Omni Services. If this flag is selected, the Store Inventory URL is also required.

Field	Description
OCDS Warehouse inventory import fields	The fifth line on this tab includes the following two fields, which are related to the import of product location information from virtual warehouse locations.
Warehouse Inventory URL	The endpoint to use when requesting product location information for virtual warehouse locations from OCDS or Merchandising Omni Services, for example, `https://SERVER/ords/ocdspdb/omnichannel/v2/inventory/warehouse`, where `SERVER` is the name of the server. Alphanumeric, 255 positions. Required if the Active flag is selected for warehouse inventory. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Active (warehouse inventory)	Select this flag to enable importing products and system products in warehouse locations through OCDS or Merchandising Omni Services. If this flag is selected, the Warehouse Inventory URL is also required.
OCDS Web service configuration fields	The final fields on this tab control web service authentication, communication, and timeout for OCDS or Merchandising Omni Services.
Request Size	Defines the total number of records to request from OCDS or Merchandising Omni Services in each import request. You can set this field as high as 500,000. A non-negative number is required if the Active flag is selected for any of the import types. Defaults to 250,000.
Connection Timeout	The number of seconds to wait for a response before timing out. A non-negative number is required if the Active flag is selected for any of the import types. Can be up to 9 positions. Defaults to 30 seconds.
Authentication Type	Enables you to select an authentication type of *Basic* or *OAuth*. Your selection in this field controls the additional fields displayed on this tab, described below. **Note:** OAuth support is available with Oracle Retail Merchandising Foundation Cloud Service (RMFCS) application version 21.0 or above. Older versions will continue to support Basic authentication.

Field	Description
User ID	The user ID to use for authenticating the web service requests in basic authentication. This field is available only when the *Authentication Type* is *Basic*. Alphanumeric, up to 50 positions. Required if the Active flag is selected for any of the import types and basic authentication is selected. **Note:** The user ID and password must be valid for authentication of the web service requests to OCDS or Merchandising Omni Services; however, no validation takes place at this screen.
Password	The password to use for authenticating the web service requests in basic authentication. Your entry is masked on the screen and encrypted in the database. This field is available only when the *Authentication Type* is *Basic*. Alphanumeric, up to 50 positions. Required if the Active flag is selected for any of the import types and basic authentication is selected.
IDCS Endpoint URL	The URL to use when requesting the token for OAuth. This field is available only when the *Authentication Type* is *OAuth*. Alphanumeric, up to 255 positions. Required if the Active flag is selected for any of the import types and using OAuth.
Scope	Defines the limits that control where the token can be used, for example: `rgbu:merch:system`. This field is available only when the *Authentication Type* is *OAuth*. Required if the Active flag is selected for any of the import types and using OAuth.
Client ID	The client ID to use when requesting the token for OAuth. Required if the Active flag is selected for any of the import types and OAuth is selected. This field is available only when the *Authentication Type* is *OAuth*.
Client Secret	The client secret to use when requesting the token for OAuth. Required if the Active flag is selected for any of the import types and OAuth is selected. This field is available only when the *Authentication Type* is *OAuth*.

Tenant

Purpose: Use the **Tenant** screen to define enterprise-wide settings for Order Broker,

How to display this screen: Select *Tenant* from the *Systems Menu*.

Which Tenant screen? When you select the **Tenant** screen:

- If you are the *admin user*, you advance to the *Tenant-Admin* screen, which displays fields required for administration of the application. See that screen for more information.
- Otherwise, if you are a retailer user, you advance to the *Tenant (retailer information)* screen, which displays configuration options for a retailer user with administrative authority. See that screen for more information.

Tenant (retailer information)

Purpose: Use the **Tenant** screen to define enterprise-wide settings for your enterprise's use of Order Broker, including those related to:

- the Order Broker module(s) you use
- your logo

About tenant settings: Tenant settings are attributes of your enterprise in Order Broker at a level higher than the *organization*. Tenant-level settings apply to all your organizations in Order Broker.

Order and merchandise volume: This screen also displays total order and merchandise locator requests broken out by month for the current and prior year. This information is also available through a web service; see the Order and Locator Metric Web Service in the *Operations Guide* (MOS ID 2114324.1) for more information.

How to display this screen: Select *Tenant* from the *Systems Menu*.

> **Note:**
>
> Only users with *Tenant* authority can display this screen. See the *Role Wizard* for more information. Also, the *admin user* does not have access to this screen.

Tenant - Admin screen: The *Tenant-Admin* screen displays additional settings related to cloud administration. This screen is available only to an *admin user*.

Fields at this screen

Update any of the fields described below and click *Save*, or click *Cancel* to exit the screen without making any changes.

Field	Description
Settings	
Tenant Logo	The URL for the logo to display in Store Connect. Not currently used. **Preview the logo:** After entering the URL, click the preview icon ( ) to preview the image at 254 x 33. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.

Field	Description
Time Zone	The time zone to use when setting schedules and displaying dates and times on screens, in reports, and in email notifications. This is the retailer's time zone, which can be different from the system time zone and the user's time zone. See *Time Zones* for a discussion. **Changing the time zone:** If you change the time zone, you should reset the following: • Report schedules, through the *Schedule Reports* screen • Imports, through the *Schedule Jobs* screen • Incremental inventory import, probable quantity update and export, and fulfilled inventory export, at the *System* screen
Geocode Address	The URL to use when generating geocode requests to determine the latitude and longitude for: • a location, when the location is created or has its address updated, either through the *New Location* or *Edit Location* screens, or through the import process • a customer's address, in order to calculate proximity for an order or inventory request, such as the SubmitOrder or the LocateItems request message If you specify a URL, Order Broker uses the Oracle Maps Cloud Service to determine latitude or longitude. Otherwise, if this field is blank, Order Broker uses the proximity database. This field is display-only at this screen, and can be set at the *Tenant-Admin* screen. Admin authority is required for access to the *Tenant-Admin* screen. See *Proximity Locator Searching* for background. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Use Routing Engine	Select this option to be able to use the Routing Engine and see related screens. **Required settings:** • If you select the *Use Store Connect* option but not this option, this option is selected automatically. • Order Broker requires that at least this option or the *Use Vendor Portal* option are selected. If you don't select any of the module use options, the Use Routing Engine option is selected automatically. See the *Home Screen* for information on screen access controlled by this setting.
Use Store Connect	Select this option to be able to use the *Store Connect* module. This option also requires the *Routing Engine*. If you select this option and don't select *Use Routing Engine*, the *Use Routing Engine* option is selected automatically. See the *Home Screen* for information on screen access controlled by this setting.

Field	Description
Use Vendor Portal	Select this option to use the Drop Ship (*Supplier Direct Fulfillment*) module. See the *Home Screen* for information on screen access controlled by this setting.

Field	Description
	About the Volume tables: The Volume tables display totals, broken out by month for the current year and the previous year, of SubmitOrder requests and of searches for fulfilling, sourcing, or pickup locations. Totals are for all organizations in the enterprise. *Activities that aren't tracked:* Order Broker does not include any of the following order-related activity in the Order or Merchandise Locator Volume tables: • status inquiries, either individually or by list • status updates, either through the status update request message or through the Order screen • fulfillment requests or intransit requests • order searches • order updates (updates to the Under Review setting or the Pickup By Date) • "reshopping" an order or line that is rejected *Supplier Direct Fulfillment?* Activities related to the Supplier Direct Fulfillment module are not tracked in the Order or Merchandise Locator Volume tables. *Things to note:* • All organizations: The totals listed include all organizations in the environment. • Counter reset: The counters reset at the start of a new month. • Actual date: The month incremented is based on the actual date, not the date specified in the request message. For example, a SubmitOrder request received on October 1 updates the total for October, even if the transaction date specified in the message is September 30. • Counter always incremented by 1: Each request increments the counter by 1, regardless of the number of items, requested quantity(s), or if multiple fulfillment types are specified for a ProductAvailabiity request. • Splitting order or line? The totals are incremented by just 1, regardless of whether the Allow Split Order or Allow Split Line preferences are selected and the order or line would need to be fulfilled out of multiple locations. For example, a SubmitOrder request for 2 units of item ABC123 results in 1 unit assigned to location 100 and 1 unit assigned to location 200; however, the Order Volume total is incremented by just 1. • Unfulfillable orders: The order counter *is* incremented for orders that cannot be fulfilled, and are automatically assigned to the Default Unfulfillable Location. • Order not created: The order count is *not* incremented when Order Broker returns an error to a SubmitOrder request if, for example, the specified product is not available in the specified location, or if the specified location does not support the order type. **Troubleshooting if last month in the tables is cut off:** Depending on the browser you are using, the font size in your browser, the zoom level in your browser, and the Display settings for your computer, the last months in the volume tables may be cut off. Some things to try: • Make sure your computer's Display setting is at 125% or less, and zoom out (-) if needed in the browser. • Decrease the font size in the browser.

Field	Description
	• If you prefer to leave the computer's Display setting at the default, try another browser; for example, the last month may be cut off in Firefox, but displayed correctly in Chrome.
Order Volume	Displays order request totals broken out by month for the current year and the previous year. The monthly total is incremented by 1 each time the routing engine processes a SubmitOrder request. *Unfulfillable?* The monthly total *is* incremented when an order or line on a new order is assigned to the unfulfillable location (Default Shipping Location), because there are no locations that could fulfill the order. *Unavailable?* The monthly total is *not* incremented when the requested quantity of the item(s) is/are not available at the specified location (for example, `Location does not have sufficient inventory of this item`) or if the specified location does not support the order type (for example, `Location (123) does not support pickup transactions`). *Rejected:* The monthly total is *not* incremented when an assigned location rejects the order or line, and Order Broker attempts to "reshop" it. *Error?* The monthly total is *not* incremented when the routing engine returns an error, such as when the requested product is invalid, unless the error indicates that the requested quantity(s) of one or more items are not available for the order.
Merchandise Locator Volume	Displays merchandise locator requests broken out by month for the current year and the previous year. The monthly total is incremented by 1 each time the routing engine: • processes a LocateItems request, regardless of the number of items in the request. • processes a ProductAvailability request, regardless of the number of items in the request or the number of fulfillment types specified in a ProductAvailability request. *Unavailable?* The monthly total *is* incremented regardless of whether the requested quantity(s) of the item(s) is/are available within the search criteria. *Error?* The monthly total is *not* incremented when the Order Broker returns an error, except an error that indicates that the requested quantity(s) of the item(s) is/are not available within the search criteria.

Tenant-Admin

Purpose: Use the **Tenant-Admin** screen to define enterprise-level settings for Order Broker, including those related to:

- the Order Broker module(s) used
- the retailer's logo
- the timeout interval for Order Broker user sessions
- the number of unsuccessful login attempts before Order Broker deactivates a user ID
- the Geocode Address for integration with Oracle Maps Cloud Service
- settings required to connect with IDCS or OCI IAM for authentication

About tenant settings: Tenant settings are enterprise-level attributes in Order Broker at a level higher than the *organization*. Tenant-level settings apply to all the retailer's organizations in Order Broker.

How to display this screen: Select *Tenant* from the *Systems Menu*.

> **Note:**
>
> Only an *admin user* can display this screen. Retailer users with Tenant authority advance instead to the *Tenant (retailer information)* screen.

Fields at this screen

Update any of the enterable fields described below and click *Save*, or click *Cancel* to exit the screen without making any changes.

- *Settings*
- *Identity Cloud Service Settings*
- *Retention Settings*
- *Geocode Settings*

Only the default admin user has access to fields related to administering Order Broker.

Field	Description
Settings	
UI Timeout	The number of minutes that Order Broker should wait before timing out a user's inactive session. When the session times out, the screen displays an error when the user next clicks an option or attempts to navigate in Order Broker, and needs to close the browser before logging back in to Order Broker. Your entry can be 15 minutes to 1440 minutes (24 hours). Required. The default setting is 30 minutes.

Field	Description
Use Routing Engine	Select this option to be able to use the Routing Engine and see related screens. **Required settings:** • If you select the *Use Store Connect* option but not this option, this option is selected automatically. • Order Broker requires that at least this option or the *Use Vendor Portal* option are selected. If you don't select any of the module use options, the Use Routing Engine option is selected automatically. See the *Home Screen* for information on screen access controlled by this setting. **Note:** This field is also available to a retailer user at the *Tenant (retailer information)* screen.
Lock Out	The number of unsuccessful, sequential login attempts that triggers Order Broker to deactivate a user account. When a user attempts to log in with an inactive account, Order Broker displays a general error indicating that the login failed. *Example:* If you set this number to 4, a user account is deactivated after the entry of 4 incorrect passwords in a row. *Reset:* A user's counter is reset: • after a successful login (for example, if there are 3 unsuccessful login attempts, followed by a successful login, the counter is reset to 0 • when you reactivate the account at the *User Profiles* screen or the *User Profile Configuration* screen **Note:** If you change the user account back to Active status, the account remains inactive until the Lockout Duration specified in the User Lockout options in WebLogic has passed. Your entry can be 1 to 99 login attempts. The default setting is 5. Required.

Field	Description
Use Store Connect	Select this option to be able to have the *Store Connect* module available. This option also requires the *Routing Engine*. If you select this option and don't select *Use Routing Engine*, the *Use Routing Engine* option is selected automatically. See the *Home Screen* for information on screen access controlled by this setting. **Note:** This field is also available to a retailer user at the *Tenant (retailer information)* screen.
Tenant Logo	The URL for the logo to display at the Store Connect login page at a size of 254 x 33 pixels. **Preview the logo:** After entering the URL, click the preview icon ( ) to preview the image at 254 x 33. This field is also available to a retailer user at the *Tenant (retailer information)* screen. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Use Vendor Portal	Select this option to have the Drop Ship (*Supplier Direct Fulfillment*) module available. See the *Home Screen* for information on screen access controlled by this setting. **Note:** This field is also available to a retailer user at the *Tenant (retailer information)* screen.
Account	The name of the Order Broker database. The destination specified in inbound XML messages must match this setting. The default setting is `locate`. Required. Once you set the account, it should not ordinarily be changed.

Field	Description
Time Zone	The time zone to use when setting schedules and displaying dates and times on screens, in reports, and in email notifications. This is the retailer's time zone, which can be different from the system time zone and the user's time zone. See *Time Zones* for a discussion. Display-only. **Changing the time zone:** When the time zone here is reset by the retailer, the following should also be reset: • Report schedules, through the *Schedule Reports* screen • Imports, through the *Schedule Jobs* screen • Incremental inventory import, probable quantity update and export, and fulfilled inventory export, at the *System* screen • Jobs scheduled through the *Schedule Jobs* screen
Job Batch Size	Indicates the number of records to include in each batch for all imports. The default setting is 1000, the maximum setting is 50,000, and the minimum setting is 10. See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database*.
PQE Startup Threads	Indicates the number of threads to allot to a background job that calculates probable quantity updates for the *Inventory Quantity Export*. The job checks this setting each time it starts. If this field is set to 0, no calculation takes place. Defaults to 0.
Identity Cloud Service Settings	

Field	Description
Use IDCS	This flag must be selected for an Order Broker Cloud Service upgrade or new installation for release 18.0 or higher. When this flag is selected: • Authentication for all users, including Web Service Authentication users, takes place using the password defined for the user in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). • All users must be created in IDCS or OCI IAM and imported into Order Broker. See the *Identity Cloud User Synchronization* job for more information. You cannot create a user in Order Broker. • Order Broker, Store Connect, and vendor users can use the Can’t sign in? link at the login page to reset their passwords. • You cannot enter or reset a password for an Order Broker user, Store Connect user, Vendor Portal user, or web service user at any Order Broker screen. • After enabling IDCS or OCI IAM for an existing installation, your Oracle representative will provide you with the new URL to log into Order Broker, Store Connect, and the Vendor Portal. **Important:** Once this flag is selected, it cannot be changed at this screen. **For more information:** See *Identity Cloud User Synchronization* for more setup information.
Client ID	The Name identifying Order Broker as an application in IDCS or OCI IAM. Typically formatted as RGBU_OBCS_ENV_APPID where OBCS identifies Order Broker and ENV identifies the environment, such as production. Alphanumeric, 255 positions. Required to use IDCS or OCI IAM for authentication of users or web service requests and to use the options at the *Manage External Application Access* screen. Can be used as the default client ID for OAuth authentication for the *Inventory Service*, See the *Manage External Application Access* for more information.
Endpoint URL	The URL to use for requests to IDCS or OCI IAM. Alphanumeric, 255 positions. Required to use IDCS or OCI IAM for authentication of users or web service requests and to use the options at the *Manage External Application Access* screen. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.

Field	Description
Client Secret	The client secret assigned by IDCS or OCI IAM and used for OAuth authentication. Required to use the options at the *Manage External Application Access* screen. Can be used as the default client secret for OAuth authentication for the *Inventory Service*. See the *Manage External Application Access* for more information. Alphanumeric, 80 positions. Masked on this screen.
Retention Settings	The following settings control the number of days to retain certain types of files. **If set to 0 days:** If you set one of the following to 0 days, then all files or records are eligible to be purged the day after creation.
File Storage	The number of days to retain: • File storage records • Generated reports After this number of days, the *daily cleanup job* automatically deletes the database records, so it is no longer possible to: • Retrieve the file storage records, or • Print the generated reports **Note:** You can also use the *File Storage History* screen to delete individual file storage records. Setting this field to a whole number from 0 to 30 days is required.
Pack Slip Files	The number of days to retain pack slip records for purchase orders that have been shipped through the Vendor Portal. After this number of days, the *daily cleanup job* automatically deletes the database records, so it is no longer possible for the vendor to print the pack slips. Can be from 0 to 30 days. Required. • This setting does not control the retention of pack slip records generated through Store Connect. The *daily cleanup job* automatically deletes these database records after one day. The store associate cannot reprint pack slips using these records. • Used only by the *Supplier Direct Fulfillment* module.
Product Import Error Files	The number of days to retain import error files before the *daily cleanup job* automatically deletes them. Can be from 0 to 30 days. Required. **For more information:** See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* and *Incremental Inventory Import* for background.

Field	Description
RICS Log History	The number of days to retain records in the RICS_LOG table of messages between Order Broker and Oracle Retail Integration Cloud Service (RICS) before the *daily cleanup job* automatically deletes them. Can be from 0 to 30 days. Required. RICS log records whose Retry Status is *Failed* are not eligible to be purged. The RICS log history messages are available for review at the *RICS Log tab* if the system is configured for order integration through RICS. See *Order Fulfillment through RICS Integration* for background.
Trace Log History	The number of days to retain trace log history records for closed, completed, canceled, or unfulfillable orders before the *daily cleanup job* automatically deletes them. If the *Trace Shopping Logic* field is set to *Detailed* at the **Event Logging** screen, the Routing Engine records the reasons why individual locations are eliminated when selecting a location to source an order. You can use the *Trace Shopping Log* screen to review these shopping trace records; see that screen for information on tracing shopping logic. Can be from 0 to 30 days. Defaults to 30. Required.
Job History	The number of days to retain job history records before the *daily cleanup job* automatically deletes them. See the *View Job History* screen to review job history. Can be from 1 to 30 days. Defaults to 30. Required.
Geocode Settings	
Geocode Address	The URL to use when generating geocode requests to determine the latitude and longitude for: • a location, when the location is created or has its address updated, either through the *New Location* or *Edit Location* screens, or through the import process • a customer's address, in order to calculate proximity for an order or inventory request, such as the SubmitOrder or the LocateItems request message If you specify a URL here, Order Broker uses the Oracle Maps Cloud Service to determine latitude or longitude. Otherwise, if this field is blank, Order Broker uses the proximity database. **Invalid URL?** If the URL specified here is invalid, the error is logged based on the specified logging level. Also, web service request messages that require lookup of the customer address return an error indicating `Customer Address not found`. This error is returned only if the *Shop Order When Proximity Unknown* preference is unselected. **For more information:** See *Proximity Locator Searching* for background. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.

Field	Description
Connection Timeout	The number of seconds to wait for a response from Oracle Maps Cloud Service. If there is no response within that number of seconds, Order Broker returns an error to a product availability, locate items, or submit order request: • Product availability or locate items request: error is `1012 Customer Address not found.` • Submit order request: error is `2084 Customer Address not found` **Note:** The `2084` error is returned only if the *Acknowledge Order Before Brokering* preference is not selected. Applies to both regular Geocode requests and to Turn-by-Turn requests. Defaults to 30 seconds.
Turn-by-Turn Distance URL	The URL where Order Broker submits requests for turn-by-turn distance calculation. Used only when a *Carrier for Turn-by-Turn Distance Evaluation* is selected at the **Preferences** screen, and that carrier is used in a locate items, product availability, or submit order request. See *Turn-by-Turn Distance Calculation for Delivery Orders* for a discussion. **Note:** Oracle staff need to make sure that this URL is added to the *allow list*.
Failed Geocode Request Threshold	Defines the number of consecutive failed interactive inventory request attempts that, if exceeded, should trigger putting the Geocode requests in a wait time. For example, if this field is set to 5, and 6 requests in a row fail to get a response, Geocode requests are halted for the defined wait time. Applies to both regular Geocode requests and to Turn-by-Turn requests. Defaults to 0. Can be left set to 0, indicating that failed requests are not evaluated, or from 1 to 10000 if failed requests should be evaluated.
Failed Geocode Request Wait Time	Defines the number of minutes to wait after the defined number of failed requests have been exceeded. For example, if this field is set to 10, Geocode requests are halted for 10 minutes. Applies to both regular Geocode requests and to Turn-by-Turn requests. Defaults to 0. Can be left set to 0 only if the Failed Geocode Request Threshold is also set to 0; otherwise, can be set from 1 to 60.

Web Service Authorization

Purpose: Use the **Web Service Authorization** screen to work with authentication requirements for Order Broker web services. By setting up and requiring user IDs and passwords for web services, you confirm that Order Broker authenticates the identity of the system submitting web service requests.

Authentication is always required. When Order Broker receives a web service request without a valid web service user and password, the request is refused with an error: `Inbound Message failed validation`.

IDCS or OCI IAM setup required: Each web service user must also be created in *IDCS or OCI IAM*.

About store locations and Xstore Office on premises: The Xstore Office on premises solution differs from other solutions in that it serves as the parent for any related store locations. Any store locations that are assigned a parent ID do not require setup as web service users; instead, you configure external access for Xstore Office on premises, and this “parent” handles authentication for all related store locations.

When authentication is required for a request originating from any location associated with the Xstore Office parent ID, the parent ID’s authentication credentials are used.

Recognizing Xstore Office store locations: When a request specifies a client ID that matches the format used in IDCS or OCI IAM to identify stores related to Xstore Office on premises, Order Broker obtains the client ID of the Xstore Office on premises application, and uses it for authentication.

Order Broker uses the CLOUD_APP_CLIENT table to track client IDs for store locations that use the Xstore Office parent ID.

> **Note:**
>
> Order Broker does not use these web service authorization settings for web service requests that Order Broker sends to an external system, such as the Oracle Maps Cloud Service.

For more information: See the Omnichannel Web Service Authentication Configuration Guide at *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2728265.1* for instructions on web service authentication configuration.

How to display this screen: Select *Web Service Authorization* from the *Systems Menu*.

> **Note:**
>
> Only users with *Web Service Authorization* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
work with web service users	Click the edit icon ( ) for a web service to advance to the *Web Service User* screen, where you can work with users identifying systems that use the web service.

Fields at this screen

Field	Description
Web Service	An Order Broker web service: • *Admin:* Includes: – ProductUpdate – LocationUpdate – LocationDetail – Email Out API – setDSAcknowledge – getInventoryAvailability – getDSOrders – setDSShipConfirm – Store Associate Location Assignment **Note:** Admin authority is also required for the inventory quantity web service; see *Probability Rules Update and Incremental Quantity Web Service* for background. • *Discovery:* Requests include Location discovery and System discovery. • *Locate:* Includes all requests related to the Routing Engine: – EchoTest – Fulfillments – Intransit – InventoryAvailability – LocateItems – OrderSearch – OrderUpdate – ProductAvailability – StatusListRequest – StatusRequest – StatusUpdate – SubmitOrder • *Private Data Request:* Includes all requests to inquire on or delete private data: – GetPrivateData – ForgetPrivateData • *Purchasing:* Includes all requests from the retailer to Order Broker related to the Supplier Direct Fulfillment module: – CreateDSOrder – CreateDSVendor – GetDSChanges – GetDSInvoices – SetDSAddressChange – SetDSCancel – SetDSCostChange **For more information:** See the *Operations Guide* for details on the above messages. • *Oracle Retail Integration Cloud Service:* Includes all requests received from Oracle Retail Integration Cloud Service (RICS). See

Field	Description
	Order Fulfillment through RICS Integration for background on order-related messages. This authentication is also required to receive individual updates to the available quantities for product locations through the Retail Integration Bus (RIB). See *Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)* for a discussion. • *Run Job:* Includes the Run Job request message to submit a job, as an alternative to submitting or scheduling a job at the *Schedule Jobs* screen. OAuth is required for the Run Job API. See the *Operations Guide* for background. • *Storage:* Includes all requests from an integrating system to upload, download, inquire on, or delete files through *File Storage API for Imports and Exports*: – putFile – getFile – getFiles – deleteFile **For more information:** See the *Operations Guide* for details on the above messages. • *Vendor:* Includes all requests submitted by an integrated vendor to Order Broker for the Supplier Direct Fulfillment module: – setDSAcknowledge – getDSOrders – setDSShipConfirm **For more information:** See the *Vendor Integration Guide* for details on the above messages.
Edit	Click the edit icon ( ) for a web service to advance to the *Web Service User* screen, where you can work with users identifying systems that use the web service.

Web Service User

Purpose: Use the **Web Service User** screen to work with user names that identify an integrating system for web service requests. This setup is required.

IDCS or OCI IAM setup required: Each web service user must also be created in *IDCS or OCI IAM*.

> **Note:**
>
> Order Broker uses web service users only for web service authentication. Unlike Order Broker user profiles, vendor users, or store associates, web service users do not have authority to any Order Broker screens.

OAuth: If you use *OAuth* for authentication of inbound web services, the User specified here is the IDCS or OCI IAM Client ID used to generate the token.

How to display this screen: Click the edit icon ( ) at the *Web Service Authorization* screen.

> **Note:**
>
> Only users with *Web Service Authorization* authority can display this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
create a web service user for a system to use for web service request authentication	1. Optionally, enter a User name of up to 255 positions. The name can include special (non-alphanumeric) characters and spaces. 2. Click *New* to open the *New Web Service User* window. At this window: 3. Enter the User or, optionally, change the entered User. 4. Click *Save* to save the user; otherwise, click *Cancel*.
delete a web service user	Click the delete icon ( ) next to a web service user to delete the user.
search for a web service user	Enter a full or partial User name and click *Search* to display web service users whose names start with or match your entry.

Fields at this screen

Field	Description
Web Service	The *Web Service* you selected at the *Web Service Authorization* screen.
Search field:	
User	The name of a user identifying a system sending web service requests. Used for authentication of messages for the web service. Up to 255 positions, and can include special (non-alphanumeric) characters and spaces. To search, enter a full or partial User name and click *Search* to display web service users whose names start with or match your entry. **OAuth:** If you use *OAuth* for authentication of inbound web services, the User specified here is the IDCS or OCI IAM Client ID used to generate the token.
Results fields:	
User	The name of a user identifying a system sending web service requests. Used for authentication of messages for the web service. Up to 255 positions, and can include special (non-alphanumeric) characters and spaces. **OAuth:** If you use *OAuth* for authentication of inbound web services, the User specified here is the IDCS or OCI IAM Client ID used to generate the token.

Field	Description
Delete	Click the delete icon ( ) next to a web service user to delete the user.

New Web Service User

Purpose: Use the **New Web Service User** window to create a new user identifying a system for web service authentication. This setup is required.

> **Note:**
>
> Order Broker uses web service users for web service authentication only. Unlike Order Broker user profiles, vendor users, or store associates, web service users do not have authority to any Order Broker screens.

How to display this window: Click *New* at the *Web Service User* screen.

> **Note:**
>
> Only users with *Web Service Authorization* authority can display this screen. See the *Role Wizard* for more information.

Completing the creation of a web service user identifying a system for web service authentication:

1. Enter the User or, optionally, change the entered User. The name can be up to 255 positions, and can include special (non-alphanumeric) characters and spaces.

   > **Note:**
   >
   > If you use *OAuth* for authentication of inbound web services, the User you specify here is the Client ID assigned when the Trusted Application (or Confidential Application) was created in IDCS or OCI IAM.

2. Click *Save* to save the user; otherwise, click *Cancel*.

Fields at this window

Field	Description
User	The name of a user identifying a system for authentication of messages for the web service. Up to 255 positions, and can include special (non-alphanumeric) characters and spaces. Case-sensitive for authentication. Required. **Matches another user?** A warning message indicates if the user ID specified when you are creating a new web service user matches an existing User ID for a user of another type, such as an Order Broker user, Store Connect associate, or Vendor user; however, you can still create the web service user. This message also indicates if the user ID matches the Cloud Service User ID of an Order Broker user or a Store Connect associate. **If using OAuth:** If you use *OAuth* for authentication of inbound web services, the User specified here is the IDCS or OCI IAM Client ID used to generate the token.

Manage External Application Access

Purpose: Use the **Manage External Application Access** screen to create, review, and work with external applications that integrate with Order Broker using OAuth, and define the web services that use OAuth authentication for inbound web service requests to Order Broker.

About OAuth: OAuth requires the requesting system to provide an access token with the web service request. Oracle Cloud Services use IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) as the authenticating service. The requesting system will use its configured client ID and secret to request an OAuth token from IDCS or OCI IAM and then include that token in service requests.

In addition to being more secure, OAuth provides better performance than basic authentication.

How requests are validated with OAuth:

1. The requesting system first passes a client ID and a client secret to an authenticating service, such as IDCS or OCI IAM.
2. The authenticating service, such as IDCS or OCI IAM, generates a short-lived token.
3. The requesting system submits the token to the destination system, rather than a password and user ID as with basic authentication.
4. The destination system validates the token and client ID.

The following is required in order to support OAuth between Order Broker and other Omnichannel products, including Order Management System and Xstore Cloud Services or Xstore Office (On Premises), as well as an external system such as an ecommerce system:

- The IDCS or OCI IAM client ID and client secret for the integrating system must be created through an Omnichannel cloud service, if it does not already exist.
- The system receiving the web service request needs to have a record of the client ID with assigned access for the web service API.

- A system sending the web service request needs to be able to request the token from IDCS or OCI IAM.
- The system sending the web service request needs to include the token so the system receiving the web service request can validate the request.

For example, if your ecommerce system will communicate with Order Broker using OAuth, you can use this page to:

- Create a client ID and secret, which you can then provide to the ecommerce system.
- Create the associated web service authentication records for the ecommerce system.

Related Tenant-Admin settings: The *Identity Cloud Service Settings* at the **Tenant-Admin** screen are required for communication with IDCS or OCI IAM:

- Use IDCS: This flag must be selected for new installations or upgrades to Order Broker Cloud Service 18.0 or higher.
- Client ID: The Name identifying Order Broker as an application in IDCS or OCI IAM. Typically formatted as RGBU_OBCS_ENV_APPID, where OBCS identifies Order Broker and ENV identifies the environment, such as production.
- Endpoint URL: The URL to use when requesting information from IDCS or OCI IAM through the Manage External Application Access screen.
- Client Secret: The client secret for Order Broker to use when requesting a token for outbound OAuth authentication.

About store locations and XOffice On Prem: The XOffice On Prem application differs from other applications in that it serves as the parent for any related store locations. Any store locations that are assigned a parent ID are not displayed at this page; instead, you configure external access for XOffice On Prem, and this “parent” handles authentication for all related store locations.

When authentication is required for a request originating from any location associated with the XOffice On Prem parent ID, the parent ID’s authentication credentials are used.

Example: XOffice On Prem is the parent for location A, so the XOffice On Prem authentication credentials are used.

For more information: See the Omnichannel Web Service Authentication Configuration Guide on My Oracle Support (2728265.1) for web service configuration instructions.

OAuth summary by product:

Product	Inbound Support	Outbound Support
Order Broker	18.2 or higher	19.1 or higher
Order Management System	18.3 or higher; 19.0 or higher supports XOffice On Prem validation of stores with parent ID.	19.1 or higher
Customer Engagement	18.0 or higher; 18.3 or higher supports XOffice On Prem validation of stores with parent ID.	not currently supported

> **Note:**
>
> Oracle Retail Integration Cloud Service (RICS) and Omnichannel Cloud Data Service (OCDS) do not currently support using OAuth for authentication of inbound messages. The Authentication Type at the *RICS Integration tab* and the *OCDS Integration tab* of the **System** screen should be set to *Basic*; however, if you are using Merchandising Omni Service rather than OCDS, the Authentication Type at the *OCDS Integration tab* of the **System** screen should be set to *OAuth*.

Troubleshooting: Options at this page that require communication with IDCS or OCI IAM, including generating a new client, regenerating the secret for a client, and refreshing the displayed applications, will fail if the administrative properties listed above are not set correctly. See the *Identity Cloud Service Settings* at the *Tenant-Admin* screen for more information on setting up these properties, or contact your Oracle representative for more help.

Outbound web services using OAuth authentication: The following outbound services support OAuth authentication:

- OMS Service: Used for authentication for the inventory request message to be sent to Order Management System. Use the *Inventory tab* tab of the *System* screen to define the OAuth Authentication Type, Client ID, and Client Secret for Order Management System. If you are using Basic authentication, it is recommended to move to OAuth.
- Job Notification Service: Used for authentication for the job notification message to be sent to an external application. Use the *Event Logging* screen, and select *OAuth* as the Authentication Type. If you are using Basic authentication, it is recommended to move to OAuth.
- OCDS:

  Used for authentication for RESTful web service requests that are sent to Merchandising Omni Service. Configure on the *OCDS Integration tab* of the *System* screen.

Outbound web services using basic authentication: OAuth is not supported for the following:

- SIM: Used for authentication of web service requests to request inventory updates through *Importing Data from Merchandising Cloud Services (RMFCS) through the Omnichannel Cloud Data Service (OCDS)*. Configure on the *Inventory tab* of the **System** screen.
- RICS: Used for authentication for the pre-order (backorder quantity update) notification message that is part of *Order Fulfillment through RICS Integration*. Configure on the *RICS Integration tab* of the **System** screen.
- OCDS: Used for authentication for RESTful web service requests that are sent to the Omnichannel Cloud Data Service. Configure on the *OCDS Integration tab* of the *System* screen.

> **Note:**
>
> If any other existing Oracle Cloud Services are configured for basic authentication and support OAuth, you should migrate these services to OAuth.

For more information: See the Oracle Retail Omnichannel Web Service Authentication Configuration Guide, on My Oracle Support at *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2728265.1*, for information on configuring the Omnichannel products for OAuth.

How to display this screen: Select *Manage External Application Access* from the *Systems Menu*.

> **Note:**
>
> Only users with *Manage External Application Access* authority can display this screen. This authority is not delivered automatically, so you must assign it manually. See the *Role Wizard* for more information.

Before you start: The first time a user advances to this screen, no applications are displayed.

Select *Refresh* to request existing applications from IDCS or OCI IAM and create records for them in Order Broker, which are then displayed, provided the *Identity Cloud Service Settings* at the *Tenant-Admin* screen are populated correctly.

Options at this screen

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>refresh the displayed applications</td><td>Click Refresh to update the list of currently existing application clients from IDCS or OCI IAM:

If any additional client applications are found in IDCS or OCI IAM that did not previously have records in Order Broker, these client application records are created in the Order Broker database. For example, additional client records might have been included through another product, such as Customer Engagement Cloud Services. These new client records are also displayed at the Web Service User screen.

Example: When you click Refresh, the updated list of client applications might include client applications created through another application, such as Customer Engagement.
If any client applications that previously existed in Order Broker have been deleted from IDCS or OCI IAM, they are deleted from Order Broker, and the web service authentication user records are also removed from the Web Service User screen.
If any client applications that previously existed in Order Broker have been changed in IDCS or OCI IAM, then applications are updated if the changed fields are the Client ID (APPLICATION_ID), Description, and the PARENT_APP_ID (used only when the Application Type identifies an XOffice On Prem store location).
When additional store locations have been created for XOffice On Prem, using the Refresh option creates the records in the Order Broker database; however, these records are not displayed at the Manage External Application Access page because they are assigned to XOffice client applications as their parent ID. The Manage External Application Access does not display any records whose parent ID is populated.
Client application records in IDCS or OCI IAM without client ID’s are not imported.
Client application records in IDCS or OCI IAM with duplicate client ID’s are tracked as duplicates in logs.
The screen displays an error if it cannot refresh the data, typically if communication with IDCS or OCI IAM fails. See above for details on the settings used for communication with IDCS or OCI IAM.
</td></tr>
<tr><td>create a new client application</td><td>Select New Client to open the Generate Application Client window.

Note:

Typically, before beginning the generation steps, you would select the Refresh option to confirm that the required client application was not already created.</td></tr>
<tr><td>work with the web services to which the client application has access</td><td>Select the edit icon ( ) for an application to open the Edit Web Services window, where you can review, select, or unselect the web services that can be authorized through the application.</td></tr>
</table>

Option	Procedure
regenerate the client secret for the application	Select the new secret icon ( ) for an application to open the *Regenerate Application Client Secret* window, where you can generate a new client secret to use when requesting an OAuth token. **Note:** This option is available only for external application clients that were created through Order Broker.
search for a client application	*To search based on application description:* Enter a full or partial *Application Description* and click *Search* to display applications that contain your entry. **Note:** External applications that were generated through Customer Engagement Cloud Services have a blank Application Description. Search for them by using the *Client ID*. *To search based on web service assignment:* Select a *Web Service* from the drop-down list and click *Search* to display applications assigned to that web service. For example, select Discovery from the drop-down list and click *Search* to display applications that are configured to authenticate discovery web service requests. Optionally, you can search based both on *Application Description* and *Web Service* assignment. This screen displays records only if they are not associated in IDCS or OCI IAM with a parent ID. If you use XOffice On Prem, each store location record in IDCS or OCI IAM is associated with the XOffice On Prem application as its parent ID. Because there can be many store locations associated with the parent application record, this screen displays just the XOffice record rather than the individual store locations.

Fields at this screen

Field	Description
Search Fields	

Field	Description
Application Description	The description of the client application created for web service authentication. This is the Description in IDCS or OCI IAM. Alphanumeric, 50 positions. **Note:** External applications that were generated through Customer Engagement Cloud Services have a blank description.

Field	Description

Web Service	The Order Broker inbound web service to which the application has access. Optionally, select one of the following to restrict your search results:
	• *Admin:* Includes:
	  – ProductUpdate
	  – LocationUpdate
	  – LocationDetail
	  – Email Out API
	  – setDSAcknowledge
	  – getInventoryAvailability
	  – getDSOrders
	  – setDSShipConfirm
	  – Store Associate Location Assignment
	• *Discovery:* Requests include Location discovery and System discovery.
	• *Foundation Read/Write:* Provides authority to update records as well as to perform inquiries on foundation data. Grants foundation:rw scope in IDCS or OCI IAM. Foundation data includes:
	  – Boxes
	  – Brands
	  – Carriers
	  – Cancel or Reject Reason Codes
	• *Foundation Read Only:* Provides authority to perform inquiries on foundation data as described above, but does not provide authority to make any updates. Grants foundation:r scope in IDCS or OCI IAM.
	• *Locate:* Includes all requests related to the Routing Engine:
	  – EchoTest
	  – Fulfillments
	  – Intransit
	  – LocateItems
	  – OrderSearch
	  – OrderUpdate
	  – ProductAvailability
	  – StatusListRequest
	  – StatusRequest
	  – StatusUpdate
	  – SubmitOrder
	• *Private Data Request:* Includes all requests to inquire on or delete private data:
	  – GetPrivateData
	  – ForgetPrivateData
	• *Purchasing:* Includes all requests from the retailer to Order Broker related to the Supplier Direct Fulfillment module:
	  – CreateDSOrder
	  – CreateDSVendor
	  – GetDSChanges
	  – GetDSInvoices
	  – SetDSAddressChange
	  – SetDSCancel
	  – SetDSCostChange
	• *Oracle Retail Integration Cloud Service:* Includes all requests received from Oracle Retail Integration Cloud Service (RICS). See Order

Field	Description
	Fulfillment through RICS Integration for background on order-related messages. *Not currently implemented.* This authentication is also required to receive individual updates to the available quantities for product locations through the Retail Integration Bus (RIB). See *Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)* for a discussion. • *Run Job:* Includes the Run Job request message to submit a job, as an alternative to submitting or scheduling a job at the *Schedule Jobs* screen. OAuth is required for the Run Job API. See the *Operations Guide* for background on this API. • *Storage:* Includes all requests from an integrating system to upload, download, inquire on, or delete files through *File Storage API for Imports and Exports*: – putFile – getFile – getFiles – deleteFile **For more information:** See the *Operations Guide* for details on the above messages. • *Vendor:* Includes all requests submitted by an integrated vendor to Order Broker for the Supplier Direct Fulfillment module: – setDSAcknowledge – getDSOrders – setDSShipConfirm **Note:** If *Vendor* access is selected, the client ID is available for selection as the *Vendor Client Id* for an integrated vendor at the **New Vendor** or **Edit Vendor** screen, provided the client ID has not already been assigned to a different vendor. **For more information:** See the *Vendor Integration Guide* for details on the above messages.
Search Results	
Application Description	The description of the application created for web service authentication. This is the Description in IDCS or OCI IAM. Alphanumeric, 50 positions.

Field	Description
Client ID	The client ID uniquely identifies the client in IDCS or OCI IAM: • If the Application Type is *XOffice On Prem*, the client ID is RGBU_XTROFFOP_ <ENV>_XOFFICE_APPID, where <ENV> is the environment, such as PROD for production. • If the application record was created through Order Broker or another omnnichannel application, the client ID is formatted as RGBU_OBCS_<RANDOM>_APPID, where OBCS identifies the application, and <RANDOM> is a series of 8 random characters. • Otherwise, if the application record was created in IDCS or OCI IAM, the client ID is a series of random characters. This is the Name in IDCS or OCI IAM. Note that the Display Name in IDCS or OCI IAM is the Client ID without the _APPID suffix. Alphanumeric, 255 positions. Display-only. **Note:** The client ID is similar to a user ID in that it identifies a client application to the authentication service, in this case IDCS or OCI IAM. You can create client IDs through the Manage External Application Access screen, in IDCS or OCI IAM, or through other applications, such as Customer Engagement.
Web Service Access	The list of Order Broker inbound web service to which the application has access. See *Web Service*, above, for a list of possible web services. You can use the *Edit Web Services* window to work with the inbound web services. Display-only.
Date Created	The date when the application record was created or regenerated in Order Broker, which could be when the record was received from IDCS or OCI IAM, or generated during the creation of a new record through Xstore On Prem authentication, as well as through the *Generate Application Client* window. Display-only.
Edit Access	Select the edit icon ( ) for an application to open the *Edit Web Services* window, where you can review, select, or unselect the web services that the application can authorize.
New Secret	Select the new secret icon ( ) for an application to open the *Regenerate Application Client Secret* window, where you can generate a new client secret to use to request an OAuth token. **Note:** This option is available only for external application clients that were created through the *Generate Application Client* window in Order Broker.

Edit Web Services

Purpose: Use the **Edit Web Services for** window to review, add, or delete the web service user authentication records for an application that submits web service requests to Order Broker.

> **Note:**
>
> The description of the selected application client is indicated in the window title; for example, if the application client's description is **Client Sample**, the window title is **Edit Web Services for Client Sample**.

How to display this screen: Select the edit icon ( ) for an application at the *Manage External Application Access* screen.

> **Note:**
>
> Only users with *Manage External Application Access* authority can display this window. See the *Role Wizard* for more information.

About Creating Access

Select or unselect any of the displayed web services. Click *OK* to update the web service access; otherwise, click *Cancel*.

Once created, the inbound web service user records are listed in the *Web Service Access* column at the **Manage External Application Access** page, and are also displayed at the *Web Service User* screen, with the User set to the Client ID for the application. The client ID can now be used for OAuth authentication for that web service.

Delete web service access: If you delete the web service option, the inbound web service user authentication record is deleted, is no longer displayed at the at the *Web Service User*, and can no longer be used for authentication for that web service.

Web Services

- *Admin:* Includes:
  - ProductUpdate
  - LocationUpdate
  - LocationDetail
  - Email Out API
  - setDSAcknowledge
  - getInventoryAvailability
  - getDSOrders
  - setDSShipConfirm

- Store Associate Location Assignment

> **Note:**
>
> Admin authority is also required for the inventory quantity web service; see *Probability Rules Update and Incremental Quantity Web Service* for background.

- *Discovery:* Requests include Location discovery and System discovery.
- *Foundation Read/Write:* Provides authority to perform inquiries as well as to create, update, or delete foundation data. Grants foundation:rw scope in IDCS or OCI IAM. Foundation data includes:
  - Boxes
  - Brands
  - Carriers
  - Cancel or Reject Reason Codes

  See Application Data Services in the Operations Guide (MOS ID 2114324.1) for more information.
- *Foundation Read Only:* Provides authority to perform inquiries on foundation data as described above, but does not provide authority to make any updates. Grants foundation:r scope in IDCS or OCI IAM.

  See Application Data Services in the Operations Guide (MOS ID 2114324.1) for more information.

  > **Note:**
  >
  > Although there are additional scopes defined in IDCS or OCI IAM, they are not in use at this time and not available to assign through the Edit Web Services window

- *Locate:* Includes all requests related to the Routing Engine:
  - EchoTest
  - Fulfillments
  - Intransit
  - InventoryAvailability
  - LocateItems
  - OrderSearch
  - OrderUpdate
  - ProductAvailability
  - StatusListRequest
  - StatusRequest
  - StatusUpdate
  - SubmitOrder

- *Private Data Request:* Includes all requests to inquire on or delete private data:
  - GetPrivateData
  - ForgetPrivateData
- *Purchasing:* Includes all requests from the retailer to Order Broker related to the Supplier Direct Fulfillment module:
  - CreateDSOrder
  - CreateDSVendor
  - GetDSChanges
  - GetDSInvoices
  - SetDSAddressChange
  - SetDSCancel
  - SetDSCostChange
- *Oracle Retail Integration Cloud Service:* Includes all requests received from Oracle Retail Integration Cloud Service (RICS). See *Order Fulfillment through RICS Integration* for background on order-related messages. *Not currently implemented.*

  This authentication is also required to receive individual updates to the available quantities for product locations through the Retail Integration Bus (RIB). See *Available-to-Sell Individual Inventory Updates through Oracle Retail Integration Cloud Service (RICS)* for a discussion.
- *Run Job:*

  Includes the Run Job request message to submit a job, as an alternative to submitting or scheduling a job at the *Schedule Jobs* screen. OAuth is required for the Run Job API.

See the *Operations Guide* for background.

- *Storage:* Includes all requests from an integrating system to upload, download, inquire on, or delete files through *File Storage API for Imports and Exports*:
  - putFile
  - getFile
  - getFiles
  - deleteFile

For more information: See the *Operations Guide* for details on the above messages.

- *Vendor:* Includes all requests submitted by an integrated vendor to Order Broker for the Supplier Direct Fulfillment module:
  - setDSAcknowledge
  - getDSOrders
  - setDSShipConfirm

> **Note:**
>
> If *Vendor* access is selected, the client ID is available for selection as the *Vendor Client Id* for an integrated vendor at the **New Vendor** or **Edit Vendor** screen, provided the client ID has not already been assigned to a different vendor.

For more information: See the *Vendor Integration Guide* for details on the above messages.

Generate Application Client

Purpose: Use the **Generate Application Client** window to:

- Generate a new client for the XOffice On Premises application and assign web service access, if it has not already been created through another application.
- Generate a new client for another application besides XOffice On Prem, if it does not already exist in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) and it directly integrates with a cloud service.

How to display this screen: Select *New Client* from the *Manage External Application Access* screen.

> **Note:**
>
> Only users with *Manage External Application Access* authority can display this window. See the *Role Wizard* for more information.

Before you start: Before beginning the generation steps, you would typically select the *Refresh* option at the *Manage External Application Access* screen to confirm that the required client application was not already created.

Creation steps: If the required client application is not displayed after you select *Refresh*:

1. Complete the *Application Details.*
   - *Application Type*: Can be either:
     – *XOffice On Prem:* Select this option only if the application has not already been created through another application.
     – *External:* Select this option if the application integrates with IDCS or OCI IAM and an OAuth Client does not already exist in IDCS or OCI IAM.

     Selecting an Application Type is required.

     – *Application Description*: Enter a brief description of the application. This will be the Description in IDCS or OCI IAM, and is informational. If you require multiple environments, such as one for production and one for UAT, you can include this information in the application description. Alphanumeric, 50 positions; required.
     – *Environment*: If the Application Type is *XOffice On Prem*, specify the type of environment, such as PROD or TEST. Your entry is converted to upper case, and no spaces or special characters are allowed. Required if the Application Type is *XOffice On Prem*; otherwise, if you set the Application Type to *External*, this field is not enterable and is not used. Informational.

2. Click *Generate Client* to generate the new client and submit it to IDCS or OCI IAM; otherwise, select *Cancel* to close the window without generating the client.
3. If you click *Generate Client* and the generation is successful, the window displays the *Generated Credentials*:
   - The new generated *Client ID*, and a link to copy it to the clipboard.
   - The new generated *Secret*, and a link to copy it the clipboard.

> **Important:**
>
> Copy and paste the new client ID and the new client secret so that you can update an external application so that it can request the token from IDCS or OCI IAM. This information will not be available later so should be stored in a secure location.

> **Note:**
>
> If your browser displays a warning message when you select the *Copy to Clipboard* option, click *Allow Access*.

The window displays an error if it cannot create the client, such as if the client ID already exists, or if communication with IDCS or OCI IAM fails. See *Manage External Application Access* for information on the properties used for communication with IDCS or OCI IAM.

Click *Done* to close the window, and click *OK* at the confirmation window to confirm that you are done copying the client ID and secret to the clipboard.

About the generated client ID:

- When the Application Type is *XOffice On Prem*, the generated Client ID is `RGBU_XTROFFOP_<ENV>_XOFFICE_APPID`, where `<ENV>` is the specified Environment.
- When the Application Type is *External*, the generated Client ID is `RGBU_OBCS_<RANDOM>_APPID`, where `<RANDOM>` is a random string of 8 characters and OBCS identifies Order Broker.

Define web service access: After creating the client, you can define web service access. See the *Edit Web Services* window for more information.

Regenerate secret: Use the *Regenerate Application Client Secret* if you need to regenerate the secret for the client application.

Fields at this screen

Field	Description
Application Details	

Field	Description
Application Type	Indicates whether the new application is either: • *XOffice On Prem:* Select this option only if the application was not created through another application. • *External:* Select this option if the application integrates with IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). Required. *About XOffice On Prem:*The *Manage External Application Access* screen displays records only if they are not associated in IDCS or OCI IAM with a parent ID. If you use XOffice on premises, each store location record in IDCS or OCI IAM is associated with the XOffice on premises application as its parent ID. Because there can be many store locations associated with the parent application record, the *Manage External Application Access* screen displays just the XOffice rather than the individual store locations.
Application Description	The description of the application created for web service authentication. This is the Description in IDCS or OCI IAM. Alphanumeric, 50 positions. Required.
Environment	If the Application Type is *XOffice On Prem*, use this field to specify the type of environment, such as PROD or TEST. Your entry is converted to upper case, and no spaces or special characters are allowed. Required if the Application Type is *XOffice On Prem*; otherwise, if you set the Application Type to *External*, this field is not enterable and is not used. Informational.
Generated Credentials	If the new client is generated correctly, the following fields are displayed.
Client ID	When the Application Type is *XOffice On Prem*, the generated Client ID is RGBU_XTROFFOP_<ENV>_XOFFICE_APPID, where <ENV> is the specified Environment. When the Application Type is *External*, the generated Client ID is RGBU_OBCS_<RANDOM>_APPID, where <RANDOM> is a random string of 8 characters. **Note:** This is the Name in IDCS or OCI IAM. Note that the Display Name in IDCS or OCI IAM is the Client ID without the _APPID suffix. Select *Copy to Clipboard* to copy the client ID to the clipboard, so you can more easily share it with the external application that needs to use it for OAuth authentication. The window indicates that the ID has been successfully copied.
Secret	The client secret to use for generating the OAuth token. Select *Copy to Clipboard* to copy the secret to the clipboard, so that you can share it with the external application that needs to use it for OAuth authentication. The window indicates that the secret has been successfully copied.

Regenerate Application Client Secret

Purpose: Use the **Regenerate Application Client Secret** window to generate a new client secret for an existing client application.

> **Note:**
>
> This option is available only for external application clients that were created through Order Broker.

For more information: See *Manage External Application Access* for background.

How to display this screen: Select *New Secret* ( )for the application client at the *Manage External Application Access* screen.

> **Note:**
>
> Only users with *Manage External Application Access* authority can display this window. See the *Role Wizard* for more information.

When you regenerate: When you regenerate the secret, the client is deleted and recreated in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) and use of the new secret is required for OAuth. You need to update the external application so that it can request the token from IDCS or OCI IAM, as the previous secret is no longer valid.

How to generate a new secret: Click *Regenerate* and click *OK* at the confirmation window. There might be a slight delay. If the request is successful, the window displays:

- The new *Client ID*, and a link to copy it to the clipboard.
- The new *Secret*, and a link to copy it to the clipboard. This information will not be available later, so it should be stored in a secure location.

Copy and paste the Client ID and the new Secret if you need to share the information for an application that is not integrated with IDCS or OCI IAM, so that application can use the secret for OAuth authentication.

> **Note:**
>
> If your browser displays a warning message when you select the *Copy to Clipboard* option, click *Allow Access*.

The window displays an error if it cannot generate the new secret, such as if communication with IDCS or OCI IAM fails. See *Manage External Application Access* for information on the properties used for communication with IDCS or OCI IAM.

Click *Done* to close the window, and click *OK* at the confirmation window to confirm that you are done copying the client ID and secret to the clipboard.

Fields at this window

Field	Description
Application Details	
Client ID	When the Application Type is *XOffice On Prem*, the generated Client ID is `RGBU_XTROFFOP_<ENV>_XOFFICE_APPID`, where `<ENV>` is the specified Environment. When the Application Type is *External*, the generated Client ID is `RGBU_OBCS_<RANDOM>_APPID`, where `<RANDOM>` is a random string of 8 characters and `OBCS` represents Order Broker. **Note:** This is the Name in IDCS or OCI IAM. Note that the Display Name in IDCS or OCI IAM is the Client ID without the _APPID suffix. Display-only.
Application Description	The description defined when the application was created for web service authentication. This is the Description in IDCS or OCI IAM. Alphanumeric, 50 positions. Display-only.
Application Type	Indicates whether the new application is either: • *XOffice On Prem:* Select this option only if the application was not already created in another application. • *External:* Select this option if the application integrates with IDCS or OCI IAM. Display-only. *About XOffice On Prem:*The *Manage External Application Access* screen displays records only if they are not associated in IDCS or OCI IAM with a parent ID. If you use XOffice on premises, each store location record in IDCS or OCI IAM is associated with the XOffice on premises application as its parent ID. Because there can be many store locations associated with the parent application record, the *Manage External Application Access* screen displays just the XOffice rather than the individual store locations.
Environment	
Generated Credentials	

Field	Description
Client ID	When the Application Type is *XOffice On Prem*, the generated Client ID is RGBU_XTROFFOP_<ENV>_XOFFICE_APPID, where <ENV> is the specified Environment. When the Application Type is *External*, the generated Client ID is RGBU_OBCS_<RANDOM>_APPID, where <RANDOM> is a random string of 8 characters and OBCS represents Order Broker. **Note:** This is the Name in IDCS or OCI IAM. Note that the Display Name in IDCS or OCI IAM is the Client ID without the _APPID suffix. Select *Copy to Clipboard* to copy the client ID to the clipboard, so you can more easily share it with the external application that needs to use it for OAuth authentication. The window indicates that the ID has been successfully copied.
Secret	The client secret to use for generating the OAuth token. Select *Copy to Clipboard* to copy the secret to the clipboard, so that you can share it with the external application that needs to use it for OAuth authentication. The window indicates that the secret has been successfully copied. This information will not be available later, so it should be stored in a secure location.

File Storage History

Purpose: Use this screen to review the records in the File Storage (FILE_STORAGE) table and optionally, delete records.

For more information: See *File Storage API for Imports and Exports* for an overview.

How to display: Select *File Storage History* from the *Systems Menu*.

> **Note:**
>
> Only users with *File Storage History* authority can advance to this screen. See the *Role Wizard* for more information.

Options at this screen

Option	Procedure
search for file storage history records	Optionally, use the *Container*, *File Name*, and/or *Date Stored* fields and click *Search* to search for one or more file storage records.
delete a file storage history record	Select the delete icon ( ) next to a file storage history record to delete the record from the File Storage table.

Fields at this screen

Field	Description
Search fields:	
Container	Optionally, select a container type and click *Search* to restrict displayed File Storage History records assigned to the selected Container: • Archive: OROB-ARCHIVES. Records that have processed and are archived. Used for vendor and shipment upload records for the Supplier Direct Fulfillment, as well as proximity uploads. • Errors: OROB-ERRORS. Import records that did not process successfully. • Exports: OROB-EXPORTS. Export records that have been generated. • Imports: OROB-IMPORTS. Import records available for processing. • Paused: OROB-PAUSED. Import or export records that have been paused temporarily when switching to a different server to complete.
File Name	The name of the file in the File Storage table. Optionally, enter a full or partial file name and click *Search* to display File Storage History records whose names contain your entry.
Date Stored	The date when the record was stored in the File Storage table. Optionally, select a date and click *Search* to display File Storage History records stored on that date.
Results fields:	
Container	Identifies the type of file storage record. Possible containers are: • Archive: OROB-ARCHIVES. Records that have processed and are archived. Used for vendor and shipment upload records for the Supplier Direct Fulfillment, as well as proximity uploads. • Errors: OROB-ERRORS. Import records that did not process successfully. • Exports: OROB-EXPORTS. Export records that have been generated. • Imports: OROB-IMPORTS. Import records available for processing. • Paused: OROB-PAUSED. Import or export records that have been paused temporarily when switching to a different server to complete.
File Name	The name assigned to the file. For information on naming for different types of files, see: • Import files: • *Import Process Overview (Other than RMFCS File Upload through OCDS or Merchandising Omni Services)* • *Incremental Inventory Import* • Export files: • *Fulfilled Inventory Export* • *Full Overlay Inventory Quantity Extract File* • *Probable Quantity Export File Layout and Contents* • *Sales Order Data Extract Files*
Date Stored	The date when the file was stored in the File Storage table.
Delete	Optionally, select the delete icon ( ) next to a file storage record to delete the record from the File Storage table.

13 About Order Broker

Purpose: Use the **About Order Broker** window to identify the current versions of Order Broker components for troubleshooting purposes.

How to display this window: Select *About Order Broker...* from the *Systems Menu*.

Cache? For troubleshooting purposes, select the Cache... button to see whether the instance of Order Broker is sharing a cache with another instance. When multiple servers share a cache, updates made to one server (such as preference changes) are available automatically to the other server.

The information displayed at the Cache window includes the number of servers in the cluster.

The Cache... button is available only to the Admin user.

All fields in this window are display-only.

Field	Description
Version	The update number, such as 23.1.101.2, where: • 23 = the last two digits of the calendar year • 1 = the major update number for the calendar year • 101 = January, represented as the quarter (1) and the month (01) • 2 = the hot fix number
Server level	The current build number applied to the Order Broker server, including the version number and the build date stamp, for example: 23.1.101.2–2023–03–15_12–34–22–AM, where 23.1.101.2 is the version number, and the date and time are March 15, 2023 at 12:34:22.
Database level	The current database level based on the version number.
Copyright	Oracle copyright information.

14 Order and Line Statuses

Overview: The *Allow Split Order* preference controls whether the lines on an Order Broker order can have different statuses.

These statuses do not apply to orders created through the Supplier Direct Fulfillment module.

In this topic:

- *Order and Line Statuses (Splitting Preference Turned Off)*
- *Order and Line Statuses (Splitting Preference Turned On)*

Order and Line Statuses (Splitting Preference Turned Off)

When the Allow Split Order preference is unselected, all order status updates apply at the order level. With this setting, the line status and the order status are always the same.

See the *Store Connect Overview* for more information on how the Store Connect module displays statuses.

Status	Description
accepted	**Integrated system:** The assigned fulfilling or sourcing location has sent a status update indicating it can fulfill the order. If the system is flagged to Require Status Update, a status update message indicating that the order is *accepted* flags the order as *polled*, indicating that the order should no longer be included in the fulfillments response message. **Store Connect:** A store associate has accepted the new order.
canceled	The order has been canceled and does not need to be fulfilled. A status update to cancel an order can come from any location. When the Routing Engine receives a status update indicating that an order is canceled, it sets the Poll Count for all order lines to 0. • If the Acknowledge Order Before Brokering preference is selected and the order is still assigned to the *IN PROCESS* location, the Order Broker does not attempt to find an actual fulfilling location for the order. See *Acknowledge Order Before Brokering* for a discussion. • If the status is currently canceled and the *Restrict Reassignment of Canceled Line* flag at the **Preferences** screen is selected, you cannot change the status through a status update request; however, you can still change the status at the *Order* screen.

<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>fulfilled</td><td>The order has been:
fully shipped (delivery order)
picked up by the customer (pickup or ship-for-pickup order)
Note:
When the order status is fulfilled, you can no longer change the status through the status update request message; however, you can change it through the Order screen.
When the order status changes to fulfilled, the Order Broker assigns a fulfillment ID to each item. This fulfillment ID is stored in the xom_order_shipment table, and returned in the <code>fulfillment_id</code> tag in the status inquiry response message and the status list response message.</td></tr>
<tr><td>intransit</td><td>The location assigned to source a ship-for-pickup order has sent the inventory to the location where the customer will pick up the order. When the pickup location is in Store Connect, the status changes immediately to intransit polled; however, a status of intransit is still displayed in Store Connect.

If you change the status to intransit through the Order screen for a ship-for-pickup order being fulfilled through Store Connect, its status is changed to intransit polled.</td></tr>
<tr><td>intransit polled</td><td>The pickup location for a ship-for-pickup order:
has received the order in the intransit response message, if the system is not flagged to Require Status Update; or
has sent a status update request changing the status to intransit polled
This status applies only to ship-for-pickup orders. When the pickup location is in Store Connect, the status changes immediately from intransit to intransit polled; however, a status of intransit is still displayed in Store Connect.

If you change the status to intransit through the Order screen for a ship-for-pickup order being fulfilled through Store Connect, its status is changed to intransit polled.</td></tr>
<tr><td>new_order</td><td>This is a new order that the Routing Engine has just created; or,
This is a new order that the Routing Engine and has just created and is still assigned to the IN PROCESS location if the Acknowledge Order Before Brokering preference is selected, or,
The order was rejected from a fulfilling or sourcing location and then reassigned to a new fulfilling or sourcing location; or,
This is a ship-for-pickup order that was rejected by the pickup location when the order was in intransit, intransit polled, or received status, indicating that the inventory was not delivered or was damaged and should be re-sourced, so the order was assigned to a new sourcing location, or,
If the system is flagged to Require Status Update, this is an order that was sent to a fulfilling or sourcing location through the fulfillments response message, but not yet updated to polled status.
Store Connect: New orders are automatically set to polled status when they are assigned to a Store Connect location. However, if an existing order line is rejected and reassigned to a different location for fulfillment, it may remain in New Order status briefly before its status changes to Polled.

If you change the status to new order through the Order screen for an order being fulfilled through Store Connect, its status is changed to polled.</td></tr>
</table>

Status	Description
picked	*Ship-for-pickup order:* The location assigned to source a ship-for-pickup order is preparing to transfer the inventory to the location where the customer will pick it up. This status might also be used by the location assigned to fulfill a delivery order. *Store Connect:* A store associate has verified that the order has been picked. If it is a pickup order and is not under review, it is eligible for pickup, and if it is a delivery order, or a ship-for-pickup order currently at the sourcing location, and is not under review, it is eligible for shipment. **Note:** A ship-for-pickup order whose Store Connect sourcing location is the same as its pickup location automatically goes into Received status when its status is set to picked. **Pickup By Date assignment:** If the organization is configured to Auto-Cancel Unclaimed Orders, a *Pickup By Date* is automatically assigned when a line's status changes to picked if the order type is pickup, or if the order type is ship-for-pickup and the sourcing location is the same as the pickup location. If you change the status to **picked** through the Order screen for a ship-for-pickup order being fulfilled through Store Connect, and if the sourcing location is also the pickup location, its status is changed to **received**.
polled	The assigned fulfilling or sourcing location has been notified of the order assignment, and the order should not be included in subsequent fulfillments response messages. Only the assigned fulfilling or sourcing location can send a status update of *polled*. An order is assigned this status when: • If the system is flagged not to Require Status Update, the assigned fulfilling or sourcing location has sent the fulfillments request and been notified of this order in the response message. • If the system is flagged to Require Status Update, the assigned fulfilling or sourcing location has acknowledged the order. Flagging an order as polled does not necessarily require changing the order status to *polled*. For example, when you set the status of a ship-for-pickup order to *accepted*, this also serves to flag the order as polled. **Store Connect:** A new order's status is immediately set to polled, and is listed on the **New Orders** screen in Store Connect. If you change the status to **new order** through the Order screen for an order being fulfilled through Store Connect, its status is changed to **polled**.
posted	The order has been posted for *Order Fulfillment through RICS Integration*.
received	The transferred inventory has been received at the location where a customer is picking up a ship-for-pickup order. **Note:** A ship-for-pickup order whose Store Connect sourcing location is the same as its pickup location automatically goes into Received status when its status is set to picked. If you change the status to **picked** through the Order screen for a ship-for-pickup order being fulfilled through Store Connect, and if the sourcing location is also the pickup location, its status is changed to **received**.

Status	Description
rejected	The assigned fulfilling or sourcing location has sent a status update indicating it cannot fulfill the order, or the pickup location for a ship-for-pickup order indicates that the inventory for the item was not received or was damaged in transit. • An order ordinarily stays in rejected status briefly until the Routing Engine can find a new fulfilling or sourcing location; otherwise, the order's status changes to *unfulfillable* and it is assigned to the Default Unfulfillable Location. • A pickup order's status changes to *unfulfillable* if it is rejected. It cannot be reshopped. • A ship-for-pickup order's status changes to *unfulfillable* if it is rejected by the pickup location. • Only the currently assigned fulfilling, sourcing, or pickup location can reject an order. When the Routing Engine receives a status update indicating that an order is rejected, it sets the Poll Count for all order lines to 0.
unfulfillable	This is a: • pickup order that has been rejected by the assigned location, or • an order that: – has been rejected more times than the Search Retries preference, or – for which the Routing Engine could not find a fulfilling or sourcing location, or – this is a ship-for-pickup order that has been rejected by its assigned pickup location. When a delivery order is unfulfillable, its assigned location changes to the Default Unfulfillable Location.

Additional statuses: The Routing Engine allows the following additional statuses if they are useful for your business processes, although it does not process any additional order updates as a result of a change to any of these statuses:

- processed
- verified
- partially fulfilled

Order and Line Statuses (Splitting Preference Turned On)

Order: If the Allow Split Order preference is selected, all status updates apply to the individual order lines regardless of the order type, and the Routing Engine determines the order status by evaluating the status of the lines.

Order-level status based on line-level status(es):

- If all of the lines on the order have the same status, apply that status at the order level; otherwise,
- If the order lines have any combination of statuses, but at least one line is in *new_order*, *accepted*, *polled*, *picked*, *intransit*, *intransit polled, partially fulfilled*, *processed*, *verified*, or *received* status, the order status is *open*; otherwise,
- If all the order lines are a combination of *canceled* or *unfulfillable*, the order status is *unfulfillable*; otherwise,

- If all the order lines are a combination of *unfulfilled*, *canceled*, or *fulfilled*, the order status is *complete*.

Line summary status if line is split: The *Detail* tab at the Order screen also uses these rules to summarize the status of a split line. A line can split if the *Allow Split Line* preference is selected. Also, you can split a line by processing a partial status update if the *Allow Partial Updates* preference is selected.

See *Processing Flow for Delivery and Pickup Orders* for a summary of how the Store Connect module displays statuses.

If Pickup By Date was assigned: If a Pickup By Date was assigned to the order line, changing the status to any other status removes the Pickup By Date. For example, if the current status of a pickup order line was picked, changing the status to canceled or fulfilled removes the Pickup By Date. See *Auto-Cancel Unclaimed Orders* for background.

Status	Description
accepted	The assigned fulfilling or sourcing location has sent a status update indicating it can fulfill or source the order line. If the system is flagged to Require Status Update, a status update message indicating that the order line is *accepted* flags the order as *polled*, indicating that the order line should no longer be included in the fulfillments response message. **Store Connect:** A store associate has accepted the order.
canceled	The individual line has been canceled and does not need to be fulfilled. The status update to cancel a line can come from any location. When the Routing Engine receives a status update indicating that a line is canceled:it sets the Poll Count for that line to 0. • the *Poll Count* for that line is set to zero. • if a pickup or ship-for-pickup order line was assigned a *Pickup By Date*, the *Pickup By Date* is removed. **Note:** • If the Acknowledge Order Before Brokering preference is selected and the item is still assigned to the *IN PROCESS* location, the Order Broker does not attempt to find an actual fulfilling location for the item. See *Acknowledge Order Before Brokering* for a discussion. • If the status is currently canceled and the *Restrict Reassignment of Canceled Line* flag at the **Preferences** screen is selected, you cannot change the status through a status update request; however, you can still change the status at the *Edit Order Item* window.
complete	**Order or line summary status:** The status of the lines on the order is a combination of *unfulfillable* or *canceled* and *fulfilled*. The Order screen also displays a *complete* status for a line at the summary level if the line is split into this combination of statuses. If none of the lines are fulfilled, then the order or line summary status is *unfulfillable*. **Note:** This is a system-assigned status; it is not possible to assign this status to an order or line.

<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>fulfilled</td><td>The line has been:
fully shipped (delivery order)
picked up by the customer (pickup or ship-for-pickup order)
Note:
When the line status is fulfilled, you can no longer change the status through the status update request message; however, you can change it through the Edit Order Item window.
When the order status changes to fulfilled, the Order Broker assigns a fulfillment ID to each item. This fulfillment ID is stored in the xom_order_shipment table, and returned in the <code>fulfillment_id</code> tag in the status inquiry response message and the status list response message.</td></tr>
<tr><td>intransit</td><td>The location assigned to source a ship-for-pickup order has sent the inventory to the location where the customer will pick up the order.

When a ship for pickup order or line is in intransit status, the Routing Engine does not change the status if the assigned fulfilling location sends a status update message indicating that the order or line is polled; however, it tracks the activity in the status history and does not include the line in subsequent fulfillments response messages to the assigned fulfilling location.

If you change the status to intransit through the Edit Order Item window for a ship-for-pickup order being fulfilled through Store Connect, its status is changed to intransit polled.</td></tr>
<tr><td>intransit polled</td><td>The pickup location for a ship-for-pickup order line:
has received the order line in the intransit response message, if the system is not flagged to Require Status Update; or
has sent a status update request changing the status to intransit polled
This status applies only to ship-for-pickup orders. When the pickup location is in Store Connect, the status changes immediately from intransit to intransit polled; however, a status of intransit is still displayed in Store Connect.

If you change the status to intransit through the Edit Order Item window for a ship-for-pickup order being fulfilled through Store Connect, its status is changed to intransit polled.</td></tr>
</table>

Status	Description
new_order	Indicates that: • this is a new line that the Routing Engine has just created; or, • this is an item on a new order that the Routing Engine and has just created and is still assigned to the *IN PROCESS* location if the Acknowledge Order Before Brokering preference is selected, or, • the line was rejected from a fulfilling or sourcing location and then reassigned to a new fulfilling or sourcing location; or, • This is a ship-for-pickup order that was rejected by the pickup location when the order was in *intransit*, *intransit polled*, or *received* status, indicating that the inventory was not delivered or was damaged and should be re-sourced, so the order was assigned to a new sourcing location, or, • If the system is flagged to Require Status Update, this is a line on an order that was sent to a fulfilling or sourcing location through the fulfillments response message, but not yet updated to polled. If an existing order line assigned to a Store Connect location is rejected and reassigned to a different location for fulfillment, it may remain in New Order status briefly before its status changes to Polled. **Store Connect:** A new order's status automatically changes to *polled*, and the order is listed on the *New Orders* screen in Store Connect. See Notifying Store Connect Locations about New Orders for background. If you change the status to **new order** for an order being fulfilling through Store Connect at the Edit Order Item window, its status is changed to **polled**.
open	**Order or summary status only:** At least one line on the order is in *new_order*, *accepted*, *polled*, *picked*, *intransit*, *intransit polled*, *partially fulfilled*, *processed*, *verified*, or *received* status. The Order screen also displays an *open* status for a line at the summary level if the line is split into this combination of statuses. **Note:** This is a system-assigned status; it is not possible to assign this status to an order or line.

Status	Description
picked	**Ship-for-pickup order:** The location assigned to source a ship-for-pickup order line is preparing to transfer the inventory to the location where the customer will pick it up. This status might also be used by the location assigned to fulfill a delivery order. **Store Connect:** A store associate has verified that the order has been picked. If it is a pickup order and is not under review, it is eligible for pickup, and if it is a delivery and is not under review, it is eligible for shipment. If it is a ship-for-pickup order, it is eligible for shipment to the pickup location. **Note:** A ship-for-pickup order line whose Store Connect sourcing location is the same as its pickup location automatically goes into Received status when its status is set to picked. **Pickup By Date assignment:** If the organization is configured to *Auto-Cancel Unclaimed Orders*, a *Pickup By Date* is automatically assigned when a line's status changes to picked if the order type is pickup, or if the order type is ship-for-pickup and the sourcing location is the same as the pickup location. See *Auto-Cancel Unclaimed Orders* for background. If you change the status to **picked** through the Edit Order Item window for a ship-for-pickup order being fulfilled through Store Connect, and if the sourcing location is also the pickup location, its status is changed to **received**.
polled	The assigned fulfilling or sourcing location has been notified of the order line assignment, and the line should not be included in subsequent fulfillments response messages. Only the assigned fulfilling or sourcing location can send a status update of *polled*. A line is assigned this status: • If the system is flagged not to Require Status Update, the assigned fulfilling or sourcing location has sent the fulfillments request and been notified of this line in the response message. • If the system is flagged to Require Status Update, the assigned fulfilling location has acknowledged the line. • Flagging a line as polled does not necessarily require changing the order status to *polled*. For example, when you set the status of a pickup or delivery order to *accepted*, this also serves to flag the line as polled. If an existing order line assigned to a Store Connect location is rejected and reassigned to a different location for fulfillment, it may remain in New Order status briefly before its status changes to Polled. **Store Connect:** New orders are automatically set to polled status when they are assigned to a *Store Connect* location. See *Notifying Store Connect Locations about New Orders* for background. If you change the status to **new order** through the Edit Order Item window for an order being fulfilled through Store Connect, its status is changed to **polled**.
posted	The order has been posted for *Order Fulfillment through RICS Integration*.

Status	Description
received	The transferred inventory for an order line has been received at the location where a customer is picking up a ship-for-pickup order. **Note:** A ship-for-pickup order line whose Store Connect sourcing location is the same as its pickup location automatically goes into Received status when its status is set to picked. **Pickup By Date assignment:** If the organization is configured to *Auto-Cancel Unclaimed Orders*, a *Pickup By Date* is automatically assigned when a line's status changes to received if the order type is ship-for-pickup and the sourcing location is different from the pickup location. See *Auto-Cancel Unclaimed Orders* for background. If you change the status to **picked** at the Edit Order Item window for a ship-for-pickup order being fulfilled through Store Connect, and if the sourcing location is also the pickup location, its status is changed to **received**.
rejected	The assigned fulfilling or sourcing location has sent a status update indicating it cannot fulfill the order line, or the pickup location for a ship-for-pickup order indicates that the inventory for the item was not received or was damaged in transit. **Note:** • A delivery or ship-for-pickup order line ordinarily stays in rejected status briefly until the Routing Engine can find a new fulfilling or sourcing location; otherwise, the line's status changes to *unfulfillable* and it is assigned to the Default Unfulfillable Location. • A pickup order line's status changes to *unfulfillable* if it is rejected. • A ship-for-pickup order line's status changes to *unfulfillable* if it is rejected by the pickup location. • Only the currently assigned fulfilling, sourcing, or pickup location can reject an order line. When the Routing Engine receives a status update indicating that a line is rejected, it sets the Poll Count to 0.
unfulfillable	This is a line on a: • pickup order and it has been rejected by the assigned location, or • ship-for-pickup order and it has been rejected by the assigned pickup location, or • delivery or ship-for-pickup order and: • it has been rejected for sourcing or fulfillment more times than the Search Retries preference, or • the Routing Engine could not find a fulfilling or sourcing location for the line. When a delivery or ship-for-pickup order is unfulfillable, its assigned fulfilling or sourcing location changes to the Default Unfulfillable Location. **Order or line summary status:** All of the lines on the order are a combination of *canceled* and *unfulfillable*. The *Order* screen also displays an unfulfillable status for a line at the summary level if the line is split into this combination of statuses.

Additional statuses: The Routing Engine allows the following additional statuses if they are useful for your business processes, although it does not process any additional order updates as a result of a change to any of these statuses:

- processed
- verified
- partially fulfilled

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Glossary

Field	Definition
admin user	A user with full authority to all Order Broker screens, including the *Tenant-Admin* screen, which includes configuration options related to application administration. This is the user created at installation. You cannot delete this user.
allow list	A list of URLs that are approved for communication. Retailers need to make sure that Oracle staff include all URLs, such as logos and those used for integrations, are on the allow list for Order Broker. 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 in Modern View. • 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 or OCI IAM 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 a return address on an email generated by Order Broker. Please contact your Oracle Representative to have the From Email specified at the *Event Logging* screen and the Cust Service From Email Address specified at the *Store Connect Preferences* screen approved.

Field	Definition
anonymized	Customer data in Order Broker can be anonymized (changed to asterisks) through either the *Completed Order Private Data Purge* job or through web service requests. Vendor and user data can be anonymized through web service requests. The types of personal data that can be anonymized are: • customer names, addresses, email addresses, and phone numbers (sold-to and ship-to) on sales orders and purchase orders • vendor names, addresses, email addresses, and phone numbers • Order Broker user names and email addresses • Vendor user names and email addresses • Store Connect associate names and email addresses • Brand contact names and email addresses Once data has been anonymized, it cannot be recovered. See *Anonymizing Data* for an overview, and see the *Operations Guide* for more information on using web service requests to inquire on private data and anonymize it.
attribute	**Product location attributes:** Key metrics for product locations. Possible attributes are *Daily Sell Through Quantity*, *Sell Quantity/Multiple*, *Minimum Sell Quantity*, *Shrink Rate %*, and *Sales Velocity*. Probability rules can use product location attributes as part of their calculations. For example, you might want to set up a probability rule that specifies to reduce the available quantity displayed in locate items search results by the daily sell-through quantity for a location in an *offline system*. **Custom attribute definitions:** You can define custom attributes and assign them to locations, or to locations and products, to filter eligible locations when routing orders. See the *Attribute Definitions* screen for setup information, and see *Using Attribute Rules for Delivery and Pickup Orders* or *Using Attribute Rules for Ship-for-Pickup Orders* for background.
auto-cancel unclaimed orders job	Cancels unclaimed pickup or ship-for-pickup orders whose *Pickup By Date* has passed, based on the settings of the *Auto Cancel Days of Unclaimed Pickup Orders* and *Auto Cancel Days of Unclaimed Ship For Pickup Orders* at the **Preferences** screen. This job uses a Schedule Interval of *Daily*, and runs at the specified Time. See *Auto-Cancel Unclaimed Orders* for a discussion.
availability update request	An inbound message to increase, decrease, or reset the current available quantity for a product location without using the import process. See the *Operations Guide* for more information.
available to promise quantity	The available quantity from the product location minus the reserved quantity and any stc_fulfilled_quantity (displayed on the **Product Location** screen as the Fulfilled Quantity).
brand	A retail brand associated with an organization to identify the organization to customers receiving drop shipments. The brand logo prints on the pack slip and pullsheet when the vendor generates these PDF documents. Each organization using the Supplier Direct Fulfillment module must have at least one brand.

Field	Definition
box	The dimensions of a box used to ship one or more items using an integrated shipping system. You can define whether the box is available in the Supplier Direct Fulfillment module, Store Connect module, or both. The dimensions of the box used with each shipment is required for all delivery orders and purchase orders using an integrated shipping system.
calculation	A mathematical expression that you can include in a *probability rule*. For example, you might include a calculation such as `Next PO Quantity Minus [-] Daily Sell Through` in a probability rule. **Created how?** You can create and work with calculations at the *Calculations* window. See that window for more information.
carrier	A ship via that your vendors use to deliver drop ship orders to customers or that a store associate can use to confirm shipment of delivery orders in Store Connect. Required for all sales orders and purchase orders.
category	See *location category*.
conflicting job	Any of the following jobs, which cannot be run at the same time: • *Fulfilled Inventory Export* • *Inventory Quantity Export* • *Incremental Inventory Import* • *Product Import*
CreateDSOrder	The message submitted by the retailer to create a new purchase order in Order Broker and assign the purchase order to a vendor.
CreateDSVendor	The message submitted by the retailer to create a new vendor in Order Broker, or to update an existing vendor.
CSV file	A comma-separated file. **Order Broker:** • *Proximity upload:* You need to upload a postal code file in this format and use the *Proximity Uploads* screen to populate or update the *proximity location table*. See *Proximity upload process overview* for more information. **Supplier Direct Fulfillment:** • *Pack slip:* When the vendor uses the *Vendor Portal* to generate pack slips for purchase orders, the vendor can generate a CSV file containing the pack slip information, either instead of or in addition to a PDF file. • *Shipment upload:* The vendor can use a CSV file to confirm shipments of purchase orders. • *Invoice upload:* The vendor can use a CSV file to create invoices.

Field	Definition
daily cleanup job	The Daily Clean Up job clears outdated information, including: • Pack slip records generated through the Vendor Portal, after the number of days specified in the Pack Slip Files field under *Retention Settings* at the **Tenant-Admin** screen. • Reports, after the number of days specified in the File Storage field under *Retention Settings* at the **Tenant-Admin** screen. • File storage records, after the number of days specified in the File Storage field under *Retention Settings* at the **Tenant-Admin** screen. • Job history records which are older than the *Job History* setting at the *Tenant-Admin* screen. • Pack slip records generated through Store Connect, after one day. • Shipping label records generated for integrated shipping with ADSI, in either the Vendor Portal or Store Connect, after one day. • Email notification records, after three days. • Product import error files or error records in the FILE_STORAGE table, after the number of days specified in the Product Import Error Files field under *Retention Settings* at the **Tenant-Admin** screen. • Records in the RICS_LOG table of messages between Order Broker and Oracle Retail Integration Cloud Service (RICS), based on the number of days specified in the RICS Log History field under *Retention Settings* at the **Tenant-Admin** screen. RICS log records whose Retry Status is *Failed* are not eligible to be purged. • Shopping logic trace records for closed, completed, canceled, and unfulfillable orders when the records are older than the number of days specified in the Trace Log History field under *Retention Settings* at the **Tenant-Admin** screen, if shopping logic tracing is enabled; see *Trace Shopping Log* for background. • Audit records for audited tables that have exceeded the audit retention days specified in the CTL_APP_CONFIG table in the database. The retention days is set 183 days (6 months) by default, and is not displayed on any screen. The audited tables include Preferences, Preference Overrides, Drop Ship Preferences, Job Schedule, System, and Web Service Users. • Records in the XOM_ITEM_DUPLICATE table that are older than 180 days. This table contains a record for each order line that was not created in Order Broker because a duplicate was found. Duplicate records are retained for 180 days for troubleshooting by Oracle Support. • Records in the XOM_ITEM_DUP_CHECK table that are older than 2 days. This table contains a record of each submitted order, which is used temporarily only for the duplicate checking process before order creation. The Daily Clean Up job does not clear logs. This job uses a Schedule Interval of *Daily*, and runs at the specified Time. See the *Tenant-Admin* screen for information on *Retention Settings* fields. See the *Schedule Jobs* screen for details and a complete list of updates.

Field	Definition
default Store Connect system	The system that is available for order processing through the Store Connect module. There can be only one Store Connect default system in an organization. Defined by the *Store Connect Default* flag at the *System* screen. This flag controls whether: • you can assign store associate user profiles to the locations associated with the system, so they can log in and process orders through the Store Connect screens • to include the locations for the system in the settings you set up through the *Store Connect Preferences* screen, such as the schedule to update assigned orders from *New Order* to *Polled* status • to generate an email notification to the store when new orders are polled • to generate pickup-ready notification emails for pickup orders or shipment notification emails for shipped delivery orders • to track the *Fulfilled Quantity* for each product location, and reduce this quantity when you run the inventory export
default system	The primary system for a *organization*. Products in Order Broker can have relationships with every integrated system, but they are defined by the default system. You should load the Order Broker database with the default system's products first, and then create system products for each additional integrated system. *Created how?* A default system is identified by the Default flag at the Systems screen. You set this flag by selecting the Organization Default checkbox at the *System* screen. **For more information:** See *Data Hierarchy* for an overview of the relationships among Order Broker elements, including systems.
default unfulfillable location	The location where the Routing Engine assigns an order if it is unable to find an actual location to fulfill or source the order or line. The Routing Engine uses the *Order Broker Settings Tab* at the **Preferences** screen, or overrides specified through the *Order Broker Preference Overrides* screen, to determine which locations to select to fulfill or source an order or line, and the Search Retries setting at this screen to determine the number of times to reassign an order or its individual lines after rejection by a fulfilling or sourcing location.
default vendor system	The system within an *organization* that is associated with any vendors. Order Broker identifies the default vendor system by the Vendor Default flag. *Required to create vendors:* You cannot create a vendor for an organization until you create the default vendor system. This system should not represent an actual system that integrates with Order Broker. *No additional information required:* It is not necessary to specify any additional information for the default vendor system besides entering the Name and selecting the Vendor Default flag. *Only one default per organization:* There can be only one default vendor system for an organization. If you select the Vendor Default flag for an additional system, the flag is cleared for the current default vendor system. *Automatically creates vendor location type:* When you create the default vendor system, Order Broker automatically creates a the *DS Vendor location type*. This location type is also required to create vendors. You should not delete this location type.

Field	Definition
delivery order	An order to be shipped to the customer from one or more locations selected by the Routing Engine or specified in the submit order message. See Delivery Order for more information. Delivery orders are supported regardless of whether ship-for-pickup orders are enabled.
discovery messages	The discovery web services provide a means to request a listing of systems or locations from Order Broker. See the *Operations Guide* for more information.
DS Vendor location type	The location type identifying drop ship vendors. Order Broker automatically creates this location type when you create the default vendor system for your organization. This location type is required for you to create drop ship vendors. *Identifying the DS Vendor location type:* Order Broker creates this location type with: • Type = *DS Vendor* • Name = *Drop Ship Vendors* • Category = *Drop Ship Vendor* **Note:** **Important:** You should not delete this location type.
File Storage API	The File Storage API is a RESTful web service that supports importing and exporting data: uploads, downloads, deletions, and inquiries. The FILE_STORAGE table stores data on import files and export files, as well as errors that occur during import processing. The web service requests files from, inquires on files in, deletes files in, and puts files in this table. **For more information:** See File Storage API for Imports and Exports for a discussion.
fulfilling location	The location (warehouse or store): • *pickup order:* where the customer is picking up the order • *delivery order:* that is shipping the order or lines to the customer • An integrated system might use the term “fulfilling location” differently.
fulfillments message	A message sent to the Routing Engine from a location or system, requesting information on any orders or lines assigned to the location, or locations associated with the system, for fulfillment or sourcing. See The Routing Engine for an overview.
getDSChanges	The message submitted by the retailer to request a listing of purchase order activity since the last getDSChanges request was processed. The response message includes information on activities such as status changes and shipments. Part of the Supplier Direct Fulfillment module.
getDSInvoices	The message submitted by the retailer to request details on any invoices posted by the vendor since the last getDSInvoices request was processed. Part of the Supplier Direct Fulfillment module.

Field	Definition
getDSOrders	The message submitted by an *integrated vendor* to request new purchase orders. See *Vendor Integration* for background, and see the *Vendor Integration Guide* for details.
getDSShipConfirm	The message submitted by an *integrated vendor* to confirm shipment of a purchase order. See *Vendor Integration* for background, and see the *Vendor Integration Guide* for details.
grouping shipment locations	The Group Shipment Locations setting at the **Preferences** screen controls how the *locate items* response works for delivery or ship-for-pickup requests: • If the Group Shipment Locations preference is unselected, the response message lists locations where the available quantity should be able to fulfill or source the order. • If the Group Shipment Locations preference is selected, the Routing Engine uses the same logic as when the preference is unselected; however, the response does not include details on each location that can fulfill or source the order. Instead, the response just includes the virtual (non-existent) location, indicating that the order can be fulfilled or sourced through the Routing Engine. **For more information:** See *Selecting a Location for a Delivery Order* for a discussion.
IDCS or OCI IAM	Order Broker uses IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) if the Use IDCS flag at the *Tenant-Admin* screen is selected. **Setting up users for IDCS or OCI IAM:** When Order Broker uses IDCS or OCI IAM for authentication, before setting up users in Order Broker, you need to create users in IDCS or OCI IAM, including the current email address for each user. The first time users attempt to log into Order Broker, they can use the Can't log in? link at the login screen to reset their passwords. IDCS or OCI IAM generates an email to the user's email address, providing a link for password reset. The user can reset the password as needed through the Can't log in? link. If the user ID in Order Broker is not the same as the user in IDCS or OCI IAM, you can use the Cloud Service User ID field to create a cross-reference between the Order Broker user record and the IDCS or OCI IAM user record. You might use this option if, for example, you use the user's email address as the user ID in IDCS or OCI IAM. This option is available only for Order Broker users and Store Connect users. When IDCS or OCI IAM is enabled, it controls authentication for: • Access to the Order Broker user interface • Access to the Vendor Portal (vendor users) • Access to the Store Connect interface (Store Connect users) • Web Service authentication (web service users) **For more information:** See *Import users from IDCS or OCI IAM* for background. • IDCS or OCI IAM controls authentication only, and does not control role-based authority within Order Broker. See the *Role Wizard* for more information on setting authority. • If IDCS or OCI IAM is enabled, you can use *OAuth*.
import ID	A unique ID number assigned by Order Broker to identify a product and product location import. See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for an overview. Part of the Routing Engine module.

Field	Definition
import process	A process to import new or updated locations, products and system products, product locations, and product barcodes from an integrated system into Order Broker for the Routing Engine. In order to import, you need to use the *Schedule Jobs* screen to schedule regular imports of new or updated products and product locations, or to run the import on demand. **For more information:** See *Importing Items/Products, Inventory, Barcodes, Images, and Locations into the Database* for background.
IN PROCESS location	The temporary virtual location where the Order Broker assigns delivery orders, or the sourcing location for ship-for-pickup orders, at initial creation before selecting an actual fulfilling or sourcing location, if no fulfilling or sourcing location is specified in the submit order request. This location is created automatically, and: • is assigned to the organization's default system • is assigned to the same location type as the organization's Default Unfulfillable Location • has all *Fulfillment* settings at the **Preferences** screen (Pickup Available, Delivery Available, Backorder Available, Ship For Pickup Sourcing Available, Ship For Pickup Receiving/Pickup Available) set to *No* Used only if the Acknowledge Order Before Brokering preference is selected.
integrated vendor	A vendor who uses XML and JSON messages, rather than *Vendor Portal* screens, to receive purchase orders and confirm shipments. See *Vendor Integration* for an overview, and the *Vendor Integration Guide* for details.
intransit message	Web service request and response used to notify *pickup location*s of any *ship-for-pickup order*s that are in transit from the *sourcing location*.
intransit polled order	An order that has been transferred from the *sourcing location* to the *pickup location*, and the pickup location or system has been notified through the *intransit message*.
inventory inquiry	A request for product availability sent by Order Broker to an *online system*, in order to respond to a *locate items* request or *product availability search*. **For more information:** See *The Routing Engine* for a process overview.

Field	Definition
inventory level type	The Type for a probability location assignment. The inventory level type provides a means to apply rules differently based on how recently you received an inventory update for the product location. Possible types are: • *On-line only:* The product location is within an online system, and you have received an inventory inquiry response for the product location. • *Off-line only:* You have not received an inventory update within the time period specified at the **Preferences** screen. Even if the product location is within an online system, it is considered off-line for the purposes of probability rule evaluation if you have not received an inventory inquiry response (if, for example, the location is having communication difficulties, or if the process responsible for inventory inquiry requests and responses is not running). • *Both:* Evaluate the rule for the product location, regardless of whether the product location is processing inventory inquiry responses. Used by the Routing Engine module.
invoice status	Possible invoice statuses are: • *Approved* = The invoice was approved, either automatically or by you, but has not yet posted to the originating system. • *Held* = The vendor has submitted the invoice, and the invoice includes at least one line that is out-of-balance because the vendor changed the unit price by more than the Unit Cost Threshold specified for the vendor: for example, you set a threshold of 10%, and the vendor changed the unit price by 15%. The invoice remains in *Held* status until the you either approve or reject it. • *New* = The vendor selected the *Update and Save for Changes* option when creating the invoice, and has not yet submitted the invoice to you for posting. • *Posted* = The invoice has been posted to the originating system, such as Order Management System, for payment processing. • *Rejected* = The vendor submitted an invoice that includes an out-of-balance line, and you rejected it. The vendor can change the invoice so that it no longer contains an out-of-balance line, or can delete the invoice. Used by the Supplier Direct Fulfillment module.
labor cost	The Labor Cost for a location is used to **"**shop**"** an order for fulfillment or sourcing as part of the *LocateItems Sequence and Splitting Examples (Standard Brokering)* method when determining the cost to pick, pack, and ship an order. You can update the labor cost through the *Location Bulk Updates* wizard.

Field	Definition
line status	**Routing Engine:** See *Order and Line Statuses* for possible Order Broker statuses. **Drop Ship:** Possible purchase order line statuses are: • *Cancelled:* You have cancelled the line • *Held:* The vendor has held the line(s) on the purchase order from processing. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation. • *In Process:* The vendor has generated a pack slip that includes the line. • *New Order:* The vendor has not yet generated a pack slip for the line. • *Shipped:* The vendor has confirmed shipment of the line. **For more information:** See *order status*.
locate items	A request to the Routing Engine inquiring whether there are any locations that should be able to fulfill a delivery or pickup order or source a ship-for-pickup order for one or more items, and the Routing Engine's response message indicating the availability of the item(s). Order Broker receives the request and determines the availability information to include in the response by: • for *product location*s in *online system*s: sends an inventory inquiry • for *product location*s in *offline system*s: checks the current available quantity and purchase order information in the Order Broker database Order Broker sends the availability information to the requesting system in the locate items response. See *The Routing Engine* for an overview.

Field	Definition
location	A place where a product is sold, stocked, or available for pickup. A location can be a warehouse or store where you keep actual inventory. It can also be a virtual location such as a web storefront or a vendor. Locations are defined within an *organization* both by the *system* to which they belong and their *location type*. You use the *Locations* screen to work with locations. Order Broker stores information on a location, including address, phone number, and hours of operation. These fields are informational only; however, the name and address information for the location that is displayed in the *locate items* response is derived from your entries at the **Location** screen. *Created how?* You must create each location within Order Broker in order to integrate its inventory for locate items searches and other processing. You can create locations through *Importing Locations through File Storage API*, the *New Location* screen, or the Location Update request JSON message. See the Operations Guide for a discussion of this request message. *Location address:* It is important that the location address be accurate, since the location address is used as the ship-to address for ship-for-pickup orders. *Sort order:* The sort at the *Preferences* and *Probability Location* screens is in alphanumeric order within each organization. In other words, organizations are listed alphanumerically by name, as are location types within an organization, and locations within a location type. Since the sort is alphanumeric, numeric codes are listed before alphabetical codes; for example, location *123* is listed before location *ABC*. *Location code requirements:* The location code is alphanumeric, can be 1 to 10 positions long, and must be unique within an organization and system. For example, you can have two locations with a code of 10 in the same organization, as long as each is associated with a different system. **For more information:** See *Data Hierarchy* for an overview of the relationships among Order Broker elements, including locations.
location category	Indicates whether each location type is a store (*S*) or a warehouse (*W*). Each location type must be assigned to one of these categories. *Created how?* The 2 location categories are delivered with Order Broker and cannot be changed. Order Broker does not evaluate locations differently based on their category; the category is informational only.
location type	Describes one or more locations within an organization. Each location type indicates the location category (store, warehouse, or vendor), and can also provide additional information, such as “East Coast Stores” or “Outlet Stores.” *Created how?* You must create each location type through the *Location Types* screen. *Location type requirements:* The location type code can be 1 to 10 positions long and must be unique within the *organization*. *Display in drop-down boxes:* The location type code and the location type name are displayed, separated by a hyphen (-). **For more information:** See *Data Hierarchy* for an overview of the relationships among Order Broker elements, including location types.

Field	Definition
location update request	A web service request to create or update a location.
master style	Indicates a basic product type. For example, the master style for a green shirt, size large, identifies the shirt itself; the color and size might represent styles in a POS system such as Xstore, and represent SKU's in an order management and fulfillment system such as Order Management System. A master style can be defined at both the *product* and the *system product* levels. *Master style requirements:* The master style can be 1 to 35 positions in length. The master style is informational only. Normally, you would never change the master style for a product in Order Broker. **Order Management System integration:** The master style for Order Management System items is the base item number; the master style is populated only for SKU'd items and is set at both the product and system product levels, assuming that Order Management System is the *default system*.
OAuth	OAuth is a standard for web service authentication through the use of access tokens rather than passwords. *IDCS or OCI IAM* is required for the use of OAuth. When creating a User at the *New Web Service User* window, specify the IDCS or OCI IAM Client ID of the client that generates the OAuth token.
OCDS or Merchandising Omni Services	You can use the Omnichannel Cloud Data Service (OCDS) or the Merchandising Omni Services to import information from across the enterprise, including data that originates in Oracle Retail Merchandising Foundation Cloud Service (RMFCS).
offline inventory	The inventory information (*Available Quantity*, *Next PO date*, and *Next PO Quantity*) currently stored in Order Broker for a product location. Order Broker uses the offline inventory information in merchandise locator responses for product locations in: • an *offline system*: always • an *online system*: if Order Broker cannot receive an update from the system, and the *No Offline Response Action* setting at the **Preference** screen is set to *Use offline*. Used by the Routing Engine module.
offline system	An offline system is one which Order Broker does not request real-time inventory updates when it receives a *locate items* request, *product availability search* request, or needs to select a fulfilling location for a delivery order, either as part of initial order creation or through the status update process; instead, it relies on the available quantity stored in the Order Broker database (*offline inventory*) to calculate the *Available to Promise* quantity. Typically, inventory levels in the Order Broker database are updated daily, or whenever scheduled by your systems administrator. *Specified how?* An offline system is identified by the Online flag being blank at the Systems screen. You clear this flag by clearing the Online checkbox at the *System* screen. Order Broker does not clear the connection information, if any, so that you can easily change an online system to an offline system and back again.

Field	Definition
online system	An online system is one from which Order Broker obtains interactive inventory updates when it receives a *locate items* request, *product availability search* request, or needs to select a fulfilling location for a delivery order, either as part of initial order creation or through the status update process. *Specified how?* An online system is identified by the Online flag at the Systems screen. You set this flag by selecting the Online checkbox at the *System* screen. You must also provide connection information for Order Broker to use when requesting product and product location updates. *Obtained how?* Depending on the setting of the Connection Type field at the **System** screen, Order Broker either sends a RESTful service request to a URL or uses an interface program. See the *System* screen for more information. *If no update available:* When Order Broker cannot obtain an interactive inventory update, it uses the available quantity stored in the Order Broker database (*offline inventory*) to calculate the *Available to Promise* quantity, if the *No Offline Response Action* setting at the **Preference** screen is set to *Use offline*. The available quantity is updated either through a recent interactive inventory update, an incremental inventory update, or through the most recent product location import from the system. Typically, inventory levels in the Order Broker database are updated daily, or whenever scheduled by your systems administrator. See *Import Process Overview (Other than RMFCS File Upload through OCDS or Merchandising Omni Services)* for background. If Order Broker is not able to obtain an interactive inventory update, and uses the offline inventory information as a result, it considers the product location offline for the purposes of evaluating it for a *probability rule*. *Update Offline Inventory?* If the *Update Offline Inventory* flag for your organization is unselected, Order Broker checks with the online system for current inventory levels, but does not actually update the database with this information during this process. You might omit the database update step during the location shopping process in order to streamline performance.
Oracle Maps Cloud Service	This integration supports sending requests for latitude and longitude to the Oracle Maps Cloud Service when: • creating a new location, or updating the address of an existing location • searching for inventory for an order based on the customer's address, such as through a locate items request or a submit order message The Oracle Maps Cloud Service is supported only when the Use Proximity Locator option is selected at the *Preferences* screen, and a Geocode Address is specified at the *Tenant-Admin* screen. If the Oracle Maps Cloud Service is not implemented, the *proximity location table* is required to support proximity location searches. **For more information:** See *Proximity Locator Searching* for an overview.

<table>
<tr><th>Field</th><th>Definition</th></tr>
<tr><td>order number</td><td>Routing Engine: The number identifying an Order Broker order in the originating system. From the <code>order id</code> passed in the submit order message. The Routing Engine uses both this order number and the request ID to track each order. The order number is alphanumeric and cannot exceed 30 positions.
Supplier Direct Fulfillment: The number identifying the sales order that originated a drop ship purchase order assigned to a vendor for fulfillment.</td></tr>
<tr><td>order status</td><td>Routing Engine: See Order and Line Statuses.
Drop Ship: Possible purchase order statuses are:
Canceled: You have canceled the purchase order.
Complete (multi-line purchase orders only): The purchase order includes more than one line, and the line statuses include a combination of Cancelled and Shipped; there are no remaining open lines.
Held: The vendor has held the line(s) on the purchase order from processing. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation.
In Process: The vendor has generated pack slips for the purchase order.
New Order: The vendor has not yet generated pack slips for the purchase order.
Open (multi-line purchase orders only): The purchase order includes more than one line, and the line statuses include at least one line that is Held, In Process, or New Order.
Shipped: The vendor has confirmed shipment of the purchase order.
For more information: See line status.</td></tr>
<tr><td>order type</td><td>The type of order, based on the <code>transaction_type_id</code> in the SubmitOrder message. Possible order types are:
delivery order
pickup order
ship-for-pickup order
Used by the Routing Engine module.</td></tr>
<tr><td>OrderUpdate message</td><td>A request to the Routing Engine to reset the Under Review flag for an order. If this flag is selected, it indicates that the fulfilling or sourcing location should not complete fulfillment of the order.</td></tr>
</table>

Field	Definition
organization	The highest level of the Order Broker data hierarchy, an organization includes the systems and products that can integrate with each other for the purposes of inventory searches, as well as the locations where products are sold or stocked. If there is more than one organization within Order Broker, searches do not cross from one organization to another. The organization-level settings include defining whether ship-for-pickup orders are enabled, and the languages and data formats to use for certain system-generated emails. *Created how?* You must create the organization through the *Organizations* screen in Modern View as the first step in setting up data in Order Broker. *Organization requirements:* The organization code can be 1 to 10 positions long and must be unique within Order Broker. *Display in drop-down boxes:* The organization code and the organization name are displayed, separated by a hyphen (-). *Display on screens:* The organization code and the organization name are displayed, separated by a space. *Default:* On screens where the organization is available for searching or creating new records, this field defaults from the organization associated with the *Default Shipping System* from your user profile, but you can override this default. **Note:** You must complete the *Preferences* screen for an organization before you can select it. **For more information:** See *Data Hierarchy* for an overview of the relationships among Order Broker elements, including organizations.
out-of-balance	An invoice detail line is out-of-balance if the vendor changes the unit price from the original purchase order unit price by more than the Unit Cost Threshold you specify for the vendor: for example, you set a threshold of 10%, and the vendor changes the unit price by 15%. Any change to unit price, either higher or lower than the original unit price, triggers out-of-balance evaluation. When the vendor submits the invoice, it does not post automatically to the originating system; instead, it remains in *Held* status until you either approve or reject it. The out-of-balance icon ( ) at the *Detail* tab of the **Invoice** screen indicates if the invoice detail line is currently out-of-balance. Used by the Supplier Direct Fulfillment module.
pack slip	The packing document that the vendor generates for drop ship purchase orders. Depending on the vendor's preference settings, the pack slip can be in PDF format, CSV format, both, or neither. Used by the Supplier Direct Fulfillment module.

Field	Definition
partial status update	An order line status update that specifies a unit quantity lower than the total quantity currently on the order line. For example, if the customer ordered 5 units and now wants only 4 units, the system might send a status update canceling 1 unit. Supported only if the Allow Partial Updates preference is selected for the organization. See *Updating Order Status at the Line or Unit Level* for an overview. Used by the Routing Engine module.
Pickup By Date	The last date before a pickup or ship-for-pickup order is eligible to be canceled by the *auto-cancel unclaimed orders job*. Assigned when an order is first eligible for pickup, based on the settings of the *Auto Cancel Days of Unclaimed Pickup Orders* and *Auto Cancel Days of Unclaimed Ship For Pickup Orders* at the **Preferences** screen. See *Auto-Cancel Unclaimed Orders* for a discussion.
pickup location	The *location* where a customer picks up a *ship-for-pickup order*. Might be the same as the *placed location* or the *sourcing location*. See *Enable Ship-For-Pickup?* for a discussion.
pickup order	An order to be picked up by the customer at a specified location, without requiring the Routing Engine to facilitate transferring the inventory to that location. See *Pickup Order* for more information. Pickup orders are supported regardless of whether ship-for-pickup orders are enabled.
placed location	The *location* (store or warehouse) that requested that an order be shipped, transferred, or prepared for pickup through the Routing Engine. **Note:** An integrated system might use a different term for this location.
polled order	An order or order line for which the assigned fulfilling or sourcing location has been notified. Order lines flagged as polled are no longer be included in the fulfillments response message. The Routing Engine flags an order line as polled automatically if the fulfilling location's system's Require Status Update flag is unselected. Otherwise, if the Require Status Update flag is selected, the assigned fulfilling or sourcing location must send a status update of either *polled* (any order type) or *accepted* (pickup or delivery orders only). **Note:** Flagging an order or line as polled does not necessarily change the order or line status to *polled*. See *Require Status Update for Assigned Orders?* for a discussion. Used by the Routing Engine module.

Field	Definition
probability rule	You can set up rules that indicate any adjustments to make to the *Available to Promise* quantity, next PO date, or next PO quantity for a product location when you display this information in merchandise locator search results; or, you can set up a rule indicating not to include a product location in search results at all under certain conditions. Probability rules let you build additional intelligence into merchandise locator searches by accounting for predictable patterns in inventory activity. **Setting up rules:** See the *Probability Rule Wizard* for information on defining and assigning probability rules, including sample rules and an overview of rule hierarchy. Used by the Routing Engine module.
probable quantity	A quantity, stored in the product_location table, based on the *available to promise quantity* after applying an assigned probable quantity rule, if any. The probable quantity is available for an external system, such as your system, to retrieve in order to provide more accurate availability information on the web storefront, but this quantity is not returned in any messages to integrated systems or displayed on any screens. See the *Inventory Quantity Export* for background.
product	A single inventory item that you sell in systems integrated with Order Broker. For example, you sell a pen as AB100 in Order Management System company 1. You sell the same pen as 345789123 in Xstore. Because your Order Management System company is your *default system*, the product is identified as AB100, and each of the related items in Xstore and other integrated systems is a *system product*, but all are related to the main product. *Created how?* Products are created in Order Broker when you use the product import process, download items, or export products from your *default system*. You can also create new products at the *Products* screen. Whenever you create a product, Order Broker also creates a *system product* for the *default system*. *Product code requirements:* The product code can be 1 to 35 positions long, and must be unique within a *organization*. *Display on screens:* The product code and the product name are separated by a space. **For more information:** See *Data Hierarchy* for an overview of the relationships among Order Broker elements, including products. Used by the Routing Engine module.

Field	Definition
product availability search	The Product Availability search message is similar to the *locate items* search, except that the Product Availability search: • can include more than one transaction type (delivery, pickup, and ship-for-pickup) in a single request, and each type can include its own search range distance • does not include product location details for delivery searches, or for sourcing locations for ship-for-pickup searches; instead, it indicates: • if the entire requested quantity can be satisfied; otherwise, • if a partial quantity of the requested items can be satisfied, the maximum available quantity of each item • for a pickup request, always returns each item location that could partially fulfill the requested quantities of all requested items • for a ship-for-pickup request, returns each location where the customer could pick up the order **For more information:** See *Using Product Availability Search for a Pickup or Delivery Order*. Used by the Routing Engine module.
product location	A record of a product within a location where it is stocked or sold. For example, an item warehouse record in Order Management System corresponds to a product location. Order Broker stores availability information for the product location, including the available quantity and the date and expected quantity of any open purchase orders. **Note:** A *system product* must first exist for the product and system owning the selected location before you can create a product location. For example, if product AB123 does not exist in Order Management System company 10, then you cannot create a product location for AB123 in company 10's warehouse 1. *Available quantity updated when?* For an *offline system*, the available quantity is updated only when you run the product import process or perform an inventory download from the system. For an *online system*, Order Broker also updates the available quantity, next PO date, and PO quantity for the product location when it receives a response to an inventory inquiry. Typically, inventory levels in the Order Broker database are updated daily, or whenever scheduled by your systems administrator. *Created how?* Typically, you create product locations through integrations with external systems. For example, product locations might be created as part of the product import process. **For more information:** See *Data Hierarchy* for an overview of the relationships among Order Broker elements, including product locations. Used by the Routing Engine module.

Field	Definition
product update request	An inbound message to create a new product, system product, and product locations without using the full import process. See the *Operations Guide* for more information.
proximity location table	A table that stores U.S. zip codes and Canadian postal codes and the longitudes and latitudes of each, so this information is available for proximity locator searches. This table is used for proximity searches only when the *Oracle Maps Cloud Service* is not implemented. **For more information:** See *Proximity Uploads* for more information on creating or updating the data in the proximity location table, and see *Proximity Locator Searching* for background. Used by the Routing Engine module.
proximity locator	Provides the ability to search for a product location based on its distance from the customer's location. For example, the customer wants a certain product and would like to know if it is available within 25 miles from his home. If proximity locator searching is enabled, Order Broker can find eligible product locations within this distance from the customer. Proximity location is supported either through the *proximity location table*, or through the *Oracle Maps Cloud Service*, depending on whether the Geocode Address is specified at the *Tenant-Admin* screen. **For more information:** See *Proximity Locator Searching* for background. Used by the Routing Engine module.
request ID	A unique number assigned by the Routing Engine to identify an order. See *The Routing Engine* for an overview.
requested location	A location specified in the *locate items* request message if the customer is interested in requesting availability information for that store location only. When the request message specifies a requested location, the Routing Engine: 1. ignores the `distance` specified in the request and does not exclude the requested location based on proximity 2. always returns the actual location in the response message, rather than the virtual location, regardless of the setting of the Group Shipment Locations flag on the **Preferences** screen, and regardless of whether the location would otherwise be excluded because you are using *zone fulfillment* or because the location is within the same system and the Disallow shopping within same system flag is selected for the system 3. always returns a response even if the *Available to Promise* quantity is less than the requested quantity
reserved quantity	The quantity on all order lines assigned to this product location that are in a status indicating the inventory is reserved and should not be assigned to new orders or listed in the LocateItems response message. See *Calculating the Available to Promise Quantity* for an overview. Used by the Routing Engine module.
retail pickup order	Not currently implemented.
retailer	The system that submits drop ship purchase orders to vendors through the Supplier Direct Fulfillment module in Order Broker.

Field	Definition
retailer user	A user who has access to Order Broker screens in order to work with either the Routing Engine, possibly including Store Connect; or the Supplier Direct Fulfillment module; or both.
retailer's time	The time to display on most screens, to use on reports and for setting schedules. Based on the Time Zone specified at the *Tenant (retailer information)* screen. See *Time Zones* for a discussion, and for a listing of screens that use the *user's time* zone instead.
Routing Engine	The Order Broker module to: • select the best location(s) to fulfill a delivery order, either automatically based on criteria that you set for the enterprise, by providing a list of possible locations • selects the best location(s) to source a ship-for-pickup order, either automatically based on criteria that you set for the enterprise • help the customer select a location for a pickup order or a ship-for-pickup order • determine whether inventory is available in the enterprise to fulfill a delivery or ship-for-pickup order • create orders across the enterprise • notify locations about orders assigned to each location for shipment, transfer, sourcing, or pickup • track order status • provide information on current order status upon request The Routing Engine can use either the *standard brokering* or *weighted brokering* criteria when selecting a fulfillment or sourcing location. When weighted brokering is selected, the *Science Engine* selects locations based on the information that the Routing Engine provides. See *The Routing Engine* for an overview.
run job API	An API that enables a system to submit a job through a web service request, as an alternative to scheduling a job at the Schedule Jobs screen or running it on demand. See the *Run Job API Message* in the Operations Guide for more information.
sales velocity	A numeric ranking you can use to indicate how well a product sells in a particular location. You can use the sales velocity ranks assigned to product locations as part of the Order Broker criteria for selecting fulfilling locations for orders. Numeric, 2 positions with an optional 2-position decimal. See the *Order Broker Settings Tab* at the **Preferences** screen and the *Order Broker Preference Overrides* screen for more information.
Science Engine	The module that selects the locations for shipment, transfer, or sourcing of delivery or ship-for-pickup orders based on data submitted to it by the *Routing Engine*. This engine is used for location selection only when *Use Weighted Brokering Rules* is selected at the **Preferences** screen.
setDSAcknowledge	The message submitted by an *integrated vendor* to confirm receipt of a batch of purchase orders. If the *Require Acknowledgement* flag is selected for an integrated vendor, the acknowledgement is required to change the status of the purchase orders from *New Order* to *In Process* and generate the pack slip. See *Vendor Integration* for background, and see the *Vendor Integration Guide* for details.

Field	Definition
SetDSAddress Change	The request message sent from an external system, such as Order Management System, to change the address on a drop ship purchase order. The request specifies whether to change just the shipping address, or both the shipping address and the sold-to address. Address changes are: • applied automatically if the purchase order or item is in *New Order* status • submitted to the vendor for review if the purchase order or line is in *Held* or *In Process* status • rejected automatically if the purchase order or line is in *Shipped* or *Canceled* status
setDSCancel	The request message sent from an external system, such as Order Management System, to cancel a line on a purchase order. Cancellations are: • applied automatically if the line is in *New Order* status • submitted to the vendor for review if the line is in *Held* or *In Process* status • rejected automatically if the line is in *Shipped* or *Canceled* status
setDSCostChange	The request message sent from an external system, such as Order Management System, to change the cost on a purchase order. Cost changes are: • applied automatically if the line is in *New Order* status • rejected automatically if the line is in *Shipped* or *Canceled* status
ship-for-pickup order	An order that the customer picks up, and which can have the originating, sourcing, and pickup locations be three different locations, for example: • order placed in warehouse A, inventory sourced from location B, and customer picks up in location C • order placed in location D, inventory sourced from location E, and customer picks up in location D • order placed in location F, inventory sourced from location F, and customer picks up in location G • order placed in location H, inventory sourced from location J, and customer picks up in location J
ship-to-store order	Not currently implemented.
sourcing location	The *location* providing the inventory for a *ship-for-pickup order*. Can be the same as either the *placed location* or the *pickup location*, but not both. If the sourced location is different from the pickup location, the sourced location transfers the inventory to the pickup location. See *Enable Ship-For-Pickup?* for background.
splitting orders	If the *Allow Split Order* preference is selected, the Routing Engine assigns the lines on a delivery ship-for-pickup order to multiple fulfilling or sourcing locations if it cannot find a single location that could fulfill or source the entire order. This setting also affects the locations returned in the locate items response message and the product availability response message, and requires that status updates apply at the line level rather than the order level. See *Selecting a Location for a Delivery Order* or *Selecting a Sourcing Location for a Ship-for-Pickup Order* for more information.

Field	Definition
splitting lines	If the *Allow Split Line* preference is selected, the Routing Engine assigns a single order line to multiple fulfilling or sourcing locations if it cannot find a single location to fulfill or source the entire line. This setting is available only if the *Allow Split Order* preference is also selected. See *Selecting a Location for a Delivery Order* or *Selecting a Sourcing Location for a Ship-for-Pickup Order* for more information.
standard brokering	The selection of shipping, transfer, or sourcing locations for delivery or ship-for-pickup orders based on the criteria set up under the *Standard Brokering Tab* of the **Preferences** screen. Standard brokering is used only if Use Weighted Brokering Rules at the **Preferences** screen is not selected. See *The Routing Engine* for an overview. You can override standard brokering rules by system and order type through the *Order Broker Preference Overrides* screen.
status inquiry	A message sent to the Routing Engine requesting the current status of an Order Broker order. See *The Routing Engine* for an overview.
status update	A message sent to the Routing Engine to update the status of an Order Broker order. See *The Routing Engine* for an overview.
store associate user	A separate user login for Store Connect, providing access to orders assigned to Store Connect locations. Authority for store associate users is controlled by a separate set of roles. See *Store Associate User Profiles* and the *Role Wizard* for more information.
Store Connect	The Order Broker module that provides a suite of screens that a store associate can use to work with orders, assigned to the store location through the *Routing Engine*. You can assign store associate users to any locations associated with the system flagged as the Store Connect Default, and the associates can use the Store Connect screens to work with orders assigned to these locations.
submit order message	A message sent to the Routing Engine requesting creation of an order. See *The Routing Engine* for an overview.
Supplier Direct Fulfillment	The Order Broker module that enables the retailer and the vendor to communicate about fulfilling drop ship purchase orders.
system	An external database or business entity which integrates with Order Broker. For example, a system is an Xstore database or an Order Management System company. *Created how?* You must create each system at the *Systems* screen. *System code requirements:* The system code can be 1 to 10 positions long, and must be unique within Order Broker. *Display in drop-down boxes:* The system code and the system name are displayed, separated by a hyphen (-). **For more information:** See *Data Hierarchy* for an overview of the relationships among Order Broker elements, including systems.

Field	Definition
system product	An identification of a product within a particular *system* that is integrated with Order Broker. *Created how?* A system product is created for a product when you download items or import products from an external system, such as Order Management System or Xstore. You can work with system products at the *System Products* screen. *System product code requirements:* The system product code can be from 1 to 35 positions long. System products need to be unique within a system, but the same system product code can be assigned across multiple systems. For example, you cannot have more than one system product for `AB123` in system 2, but you can have system product `AB123` in systems 2, 3, and 4. **For more information:** See *Data Hierarchy* for an overview of the relationships among Order Broker elements, including systems. Used by the Routing Engine module.
system time	Set to UTC (Coordinated Universal Time).his time zone is used for dates and times in the database and web service responses. See *Time Zones* for a discussion.
tenant	Use the *Tenant-Admin* screen to review or work with attributes of your business in Order Broker at a level higher than the *organization*, such as specifying which modules to use. The *Tenant - Admin* screen, available if you are an *admin user*, includes additional settings required for cloud administration. Tenant-level settings apply to all your organizations in Order Broker.
turn-by-turn distance	Optionally, you can use the actual turn-by-turn distance, rather than the straight-line (Euclidean) distance, to determine which locations are eligible to fulfill a delivery order using a specified carrier. This option is available only if you use *Oracle Maps Cloud Service*. See *Turn-by-Turn Distance Calculation for Delivery Orders* for an overview.
type	See *location type*.
under review	A selected setting indicates that the fulfilling system needs to delay shipping or fulfilling the order until the flag is cleared. • It is the responsibility of the integrating systems to prevent fulfillment of an order that is under review. Order Broker does not prevent fulfillment based on this setting. • The items on orders that are under review are still included in the *reserved quantity* calculation. **Updates:** You can select this flag through the initial *submit order message*, and can also update this flag: • through the *OrderUpdate message* • at the *Order* screen, if you have Order Maintenance authority The History tab of the *Order* screen displays a record of each time you change the setting of this flag. *Hold under review?* If the order is fulfilled through *Order Fulfillment through RICS Integration* and the *Hold Under Review Orders* flag for the system is selected, the order is submitted for fulfillment when you clear this flag. See *Order Fulfillment through RICS Integration* for background.

Field	Definition
user's time	The time zone on the user's personal computer or specified in the user's browser. This is the time used to determine the date that defaults when you click the calendar icon. In most cases, the times displayed on screens and indicated in emails are in the retailer's time rather than the user's time. See *Time Zones* for a discussion.
vendor	The external organization that fulfills drop ship purchase orders for the retailer. Each purchase order processed through the Supplier Direct Fulfillment module is associated with a vendor.
vendor default system	A vendor default system is required before you can create any vendors to fulfill drop ship orders. An organization can have only one vendor default system. It is not necessary to specify any additional information for the vendor default system besides the organization, name, and this flag.
vendor item	The vendor's item code. The *CreateDSOrder* message specifies the vendor item code for each item on a purchase order, and Order Broker creates the vendor item record automatically if it does not already exist. Used for the Supplier Direct Fulfillment module.
Vendor Portal	The external website that a vendor can use to review, print, report shipments on, and create invoices for drop ship purchase orders through the Supplier Direct Fulfillment module. Each vendor user has access to screens in the vendor portal listing information related only to that purchase orders for the associated vendor.
vendor preferences	Preference settings specific to a vendor, including: • pack slip generation output, such as whether to generate pack slips in PDF or CSV format, and whether the pack slip PDF should be graphical or nongraphical • email addresses to receive notifications on purchase order activity A vendor user can also modify these settings with the required authority. See the *Preferences tab* at the **New Vendor** or **Edit Vendor** screen for more information.
vendor user	A separate user login to the vendor portal, providing access to the purchase orders for the associated vendor. Authority for vendor users is controlled by a separate set of roles. See the *Role Wizard* for more information.

Field	Definition
virtual location	The location that the Routing Engine uses in the *locate items* response message to indicate that it can fulfill an order. The Routing Engine returns the virtual location in the response message only if you use the Group Shipment Locations option, indicating that requesting systems do not need to know which locations would be able to ship an order for the requested item(s), only that the order can be shipped (*delivery order*) or sourced (*ship-for-pickup order*). The *locate items* response message lists the virtual location, rather than details on actual locations, if: • the Group Shipment Locations flag at the **Preferences** screen is selected • the Routing Engine receives a LocateItems request message with the `fulfillment_type` set to *DELIVERY* or *SHIPFORPICKUP* • the Routing Engine has found at least one location that should be able to fulfill or source each line on an order for the requested item(s) in the specified quantity(ies), or that is flagged as Backorder Available You do not need to create the virtual location in Order Broker.
web service	A programming component made available by a web server to perform specific programming tasks. For example, there is a discovery web service to supply an external system with the systems and locations set up in Order Broker for an organization.
weighted brokering	The selection of shipping, transfer, or sourcing locations for delivery or ship-for-pickup orders by submitting information to the *Science Engine*. The information submitted includes the criteria set up under the *Weighted Brokering Tab* of the **Preferences** screen, information about the order line, a list of eligible locations, and other configuration settings such as whether split order is enabled. Weighted brokering is used only if Use Weighted Brokering Rules at the **Preferences** screen is selected. See *The Routing Engine* for an overview. You can override weighted brokering rules by system and order type through the *Order Broker Preference Overrides* screen.
zone fulfillment	An option to restrict location selection for delivery orders based on the shipping address for an order, or based on the requesting location in a *locate items* request. You can set up zones to include addresses based on country, state or province, or zip code prefix range. Also, you can specify one or more primary store or warehouse locations to fulfill orders within the zone, as well as one or more alternate locations to use if the merchandise is not available within the primary locations. **For more information:** See *Using Zones for Fulfillment*. Used by the Routing Engine module.

16 Frequently Asked Questions

In this topic:

General Order Broker questions	
Why can't I work with systems, event logging, preferences, proximity uploads, or user profiles?	Your user roles control this access. See the *Role Wizard* for more information.
How do I know which version of Order Broker is installed?	Select *Systems > About Order Broker...* to display the *About Order Broker* window.

Why did my Order Broker session time out? How can I get back in?	The UI Timeout setting at the *Tenant* screen specifies how many minutes to wait before timing out an inactive user session. **Multiple sessions using same credentials?** If you have multiple active sessions, in different tabs of the browser, for products using the same authentication credentials, logging out of one session automatically logs you out of any additional active session. For example, if you have both an Order Broker session and a Store Connect session, and you log out of the Store Connect session, this automatically logs you out of the Order Broker session as well. If you attempt to log back into one of the sessions in this situation, you might encounter a message: You are already logged in. If this occurs, you can either return to the original URL for product, or you can close the browser and log back into one or both sessions.
Why did Order Broker return an error: Inbound Message failed validation?	Order Broker returns this error to a web service message if authentication is required for the web service and the request message was not sent with a valid authentication. See the Web Service Authorization screen for background.
Why are my search results not correct?	Unless otherwise indicated, codes and names in Order Broker, Store Connect, and Supplier Direct Fulfillment are case-sensitive (`A` is not the same as `a`). When searching for a specific record on a screen, you must enter the case correctly; for example, if you are searching for reason code `CAN`, you must enter `C`, `CA`, or `CAN` in the code field, and not `c`, `ca`, or `can`.
Will trailing blank spaces in an inbound message cause an error?	Order Broker trims any trailing blank spaces from the fields in inbound messages, so trailing blank spaces do not cause an error.
Why can't I generate reports?	All servers must have the same required fonts installed.
How can I open the XLSX version of a generated report?	If the XLSX version of the report does not open automatically in your browser, save the report file and then open it in with your spreadsheet application.
Why are report files sent as email attachments named Untitled.dat?	If your email server blocks the PDF or XLSX files as suspicious attachments, the files could be renamed as Untitled.dat. You can save the file and assign it the correct extension (PDF or XLSX), or you can request that your system administrator add the Order Broker server to an allow list so that the attachments are no longer blocked.

Why don't scheduled imports, exports, and reports run at the scheduled times?	**Time differences:** The times displayed on screens, and used for scheduled events such as imports, exports, and report generation, are based on the *retailer's time* as specified at the **Tenant** or **Tenant - Admin** screen. The retailer's time may be different from your local time (the *user's time*). For example, if the retailer's time zone is two hours later than your local time zone, then an import scheduled at 8:00 runs at 10:00 in your local time. See *Time Zones* for a discussion. **Resolving scheduling issues:** The *Reschedule All* option at the *View Active Schedules* screen stops and restarts the schedules for all jobs and periodic programs in the case of an interruption. Also, you use this option to start running all scheduled jobs and programs when first configuring Order Broker, or after applying an upgrade. Note that the *Reschedule All* option does not restart jobs that are in Paused status (⊘). Jobs stay in Paused status only briefly before Order Broker restarts them automatically.
Where can I find information on import and export file layouts and mapping?	See *Importing Locations through File Storage API*, *Importing Products and System Products through File Storage API*, *Importing Product Locations through File Storage API*, and *Importing UPC Barcodes through File Storage API* for import details, file layouts, and data mapping. See the *System* screen for information on the probable quantity export, incremental inventory import, and fulfilled inventory export.
Is personally identifiable information logged?	All personally identifiable information for customers, vendors, or locations is removed from logs. Personally identifiable information includes names, address, email addresses, phone numbers, customer numbers, and tender accounts. The personally identifiable information is replaced in the log entry with the text `*** Removed by Logger ***`. For example, the email address might appear in the log as `<email>*** Removed by Logger ***</email>`.
Where are date, time, and numeric formats defined?	The date, time, and numeric formats displayed on Order Broker screens are defined at the *User Profile Configuration* screen. The date, time, and numeric formats in system-generated emails are defined for the organization (see the *Organizations* screen).
Where are language settings defined?	The language settings include: 1. screens: the URL used for Order Broker 2. system-generated emails: the Language specified for the organization (see the *Organizations* screen) or at the *Event Logging* screen
Why can't a user log in after the account was re-activated?	You can deactivate a user account manually, but an account can also be deactivated if there has been a series of unsuccessful login attempts equal to the number specified in the Lock Out field at the **Tenant-Admin** screen. If you change the user account back to Active status, the account remains deactivated until the Lockout Duration specified in the User Lockout options in WebLogic has passed.
How are product import error files cleared?	Product import error and part files are cleared by the Daily Clean Up job; see *Schedule Jobs* for more information.

How to resolve data cut off on screens or unnecessary scrollbars?	Depending on the browser you are using, the font size in your browser, the zoom level in your browser, and the Display settings for your computer, the last months in the volume tables at the *Tenant (retailer information)* screen may be cut off, or unnecessary scrollbars may be displayed on certain screens or windows. Some things to try: • Make sure your computer's Display setting is at 125% or less, and zoom out (-) if needed in the browser. • Decrease the font size in the browser. • If you prefer to leave the computer's Display setting at the default, try another browser; for example, the last month may be cut off in Firefox, but displayed correctly in Chrome.
Why is the online help slow to load, or why is the online help search slow?	It may be necessary to clear your browser's cache or recent history in order to correct an online help performance issue.
Why are screens displaying asterisks rather than personal information?	Data can be anonymized through the *Completed Order Private Data Purge* job, or through a web service request. Once the data is anonymized, it is replaced with asterisks, and cannot be recovered. The types of personal data that can be anonymized are: • Customer names, addresses, email addresses, and phone numbers (both sold-to and ship-to) on both sales orders and purchase orders • vendor names, addresses, email addresses, and phone numbers • Order Broker user names and email addresses • Vendor user names and email addresses • Store Connect associate names and email addresses • Brand contact names and email addresses See *Anonymizing Data* for background.
Why aren't screens displaying the organization hierarchy correctly?	Screens that display the organization hierarchy, such as the *Probability Location*, *Probable Quantity Location*, or *Preferences* screens, can't display this hierarchy until a default shipping system is defined for the default admin user. See *Assign the default shipping system to the default user* for more information.
Why do I advance to a blank screen after logging out, rather than a login screen?	This issue can occur when the URL for Order Broker includes http rather than https. The URL should always use https.
Why does a user advance to the Unauthorized Access screen when attempting to log into Order Broker?	This situation can occur if the user is configured in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) for another application, such as Order Management System, but does not have access to Order Broker, and they attempt to log into Order Broker. After the user completes entry of their IDCS or OCI IAM credentials, **Unauthorized Access** screen opens. The options at this screen are: • *Retry:* The user can select this option to advance to Order Broker only if a system administrator has granted access while the **Unauthorized Access** screen is open. • *Cancel:* Exit the screen.

Why does a user advance to the Unauthorized Access screen when attempting to log into the Vendor Portal?	This situation can occur if the user is configured in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) for another application, such as Order Broker, but does not have access to the Vendor Portal. After the user completes entry of their IDCS or OCI IAM credentials, **Unauthorized Access** screen opens. The options at this screen are: • *Retry:* The user can select this option to advance to the Vendor Portal only if a system administrator has granted access while the **Unauthorized Access** screen is open. • *Logout of SSO:* Exit the screen and log out of any open applications that use the same SSO account.
Why does a user see a message indicating that they do not have any stores assigned when attempting to log into Store Connect?	This situation can occur if: • The user has access to Store Connect, but has not been provided with authority to any store locations through the Edit Store Associate User Profile screen, or; • The user is configured in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) for another application, such as Order Broker, but does not have access to Store Connect.
What is the Inactivity Timeout screen?	You advance to the **Inactivity Timeout** screen if your Order Broker session has been inactive for the number of minutes specified as the *UI Timeout* at the **Tenant-Admin** screen. This screen provides an option to log back into Order Broker by re-entering your credentials. **Vendor Portal timeout:** A vendor user advances to the **Inactivity Timeout** screen if the Vendor Portal session has been inactive for the number of minutes specified as the *Portal UI Timeout* at the **Drop Ship Preferences** screen. This screen provides an option for the vendor user to log back into the Vendor Portal by re-entering credentials.
Is it OK to log out of Order Broker by closing the browser tab?	You should always log out of Order Broker by selecting the *X* on the upper right of the screen, and out of Order Broker Modern View by selecting Logout under your user name. If you simply close the browser tab, you may not be able to log back into Order Broker without closing the browser session and restarting a new session. Similarly, a vendor user should always log out of the Vendor Portal by selecting the *X* on the upper right. Note that if you select Login after logging out from Modern View, you return to the Classic View home screen.
Is it OK to have Order Broker open in one tab and another Oracle Retail application open in another tab if you use the same IDCS or OCI IAM credentials for both applications?	Use care when you have Order Broker and another Oracle Retail application, including the Vendor Portal, open in different tabs of the same browser session if you use the same IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) credentials for both. Logging out or timing out of a session for one application may affect your login status in the other application. To prevent possible issues, open each Oracle Retail application in a separate browser session rather than in different tabs of the same session.

What are the supported languages?	To specify a different language, append the code from this list to the end of the Order Broker URL: • zh_CN—Chinese (simplified) • nl_NL—Dutch • fr_FR—French • de_DE—German • it_IT—Italian • ja_JP—Japanese • pt_BR—Portuguese (Brazilian) • ru_RU—Russian • es_ES—Spanish • sv_SE—Swedish **Switching between Classic View and Modern View:** If you advance from Classic View to Modern View, the currently selected language applies in the current session. If you are in Modern View and select a different language by changing the code at the end of the URL, the newly selected language applies when you return to Classic View in your current session. To switch to a different language after logging out, you need to either clear your browser cache or append the new language code to the end of the URL.
Merchandise Locator and Routing Engine questions	
Why are no products displayed at the Products screen?	When you initially install Order Broker, there are no products in its database. You need to perform the steps described in *Setting Up Data for the Routing Engine Module* and then continue importing products or items from your default system. Another possibility is that the cached information in the browser needs to be refreshed. To prevent this issue from occurring, if you use Internet Explorer: 1. Select *Tools* > *Internet Options*. 2. In the **Internet Options** window, select the *Advanced* tab. 3. Scroll down to the **Security** options and select *Empty Temporary Internet Files folder when browser is closed.* 4. Click *OK* to apply the change.
How can I tell when the availability information for a product location was last updated?	This information is displayed at the *Browse Product Locations* window. Availability information can by updated by: 1. the *import process* 2. responses to inventory inquiries sent by Order Broker, if the location is in an *online system* 3. entry at the *New Product Location* screen or the *Edit Product Location* screen 4. the incremental inventory update (see the *Incremental Inv Update* tab of the *System* screen)
Why are there no product locations for a product?	Confirm that the location was created in Order Broker, as described in *Setting Up Data for the Routing Engine Module*.

How can I display the probability rule assignments for a location, location type, or organization?	See the *Probability Location* screen. **Probable quantity rules:** You use the *Probable Quantity Location* screen rather than this screen to assign probable quantity rules, which update the *probable quantity* that a system, such as your ecommerce site, can use to estimate an item's availability. For more information, see: • the *Probable Quantity Rules* screen • the *Probable Quantity Location* screen • the *Probable Qty Export* tab at the *System* screen
Why can't I display the New Location screen?	You need to first set the Use Proximity Locator preference at the *Preferences* screen. See *Setting Up Data for the Routing Engine Module* for an overview.
Why isn't an Item # displayed at the Order screen?	If your user ID is not assigned a Default Shipping System at the *User Profile Configuration* screen, the Item # might not be displayed at the *Details* tab on the *Order* screen.
Why did a rejected order stay in rejected status?	This can occur if the *Default Unfulfillable Location* is not associated with the default system for your organization, because Order Broker cannot reshop the order unless there is a system product record for the system associated with the Default Unfulfillable Location.
Why was an entire order assigned to the Default Unfulfillable Location when it could have been partially fulfilled?	The Routing Engine does not initially create an order or line as partially unfulfillable. If there is no location that can fulfill the entire requested quantity of an order or line, or is flagged as Backorder Available, the entire order is assigned to the Default Unfulfillable Location.
How can I determine why an individual location was filtered as a sourcing location for an order?	Use the *Trace Shopping Log* screen to review the reasons why the Routing Engine eliminated each possible location from sourcing the order. • The Routing Engine traces shopping logic only if the *Trace Shopping Logic* field is set to *Detailed* at the **Event Logging** screen. Typically, you would select to trace shopping logic only to research why certain locations are or aren't selected to fulfill orders. • These history records are retained only for the number of Trace Log History days specified at the *Tenant-Admin* screen; after that number of days, the *daily cleanup job* automatically deletes the records.
Supplier Direct Fulfillment and Store Connect questions	
Why can't I create a vendor?	You cannot create a vendor for an organization until you create the default vendor system. See the *default vendor system* for background.
What is the DS Vendor location type?	The DS Vendor location type is required for you to create vendors for your organization. Order Broker automatically creates the *DS Vendor location type* for an organization when you create the *default vendor system*. You should not delete the DS Vendor location type.

How to resend invoices to the order management system?	If the order management system did not receive and create the invoices, you can resend one or more invoices by setting the posted_date in the vendor_invoice table to NULL. Order Broker then includes these invoices in the GetDSInvoicesResponse message the next time it receives the request from the order management system.
Why does the Vendor Portal link in an email to the vendor open the Vendor Portal in a different language?	The VPA Url specified at the *Drop Ship Preferences* screen defines the link to the Vendor Portal to embed in emails to vendors, while the locale appended to the Vendor Portal URL controls the language displayed on Vendor Portal screens. Because each vendor's locale is not automatically appended to the Vendor Portal link embedded in the email, clicking the link may bring the vendor to the Vendor Portal with a different language displayed. For example, if the VPA Url specified includes a French locale, but an individual vendor uses an English locale, when the vendor clicks the Vendor Portal email in an email, the Vendor Portal opens with French displayed on screens.

Which currency symbols are supported in emails?

ISO 4217 Code	Symbol	Name	Countries
CAD,MXN,USD	$	Dollar	Canada, Mexico, USA
EUR	€	Euro	Euro Zone
GBP	£	Pound Sterling	United Kingdom
JPY	¥	Yen	Japan
KPW,KRW	₩	Won	North Korea, South Korea
ILS	▯	New Shekel	Israel
INR	₹	Rupee	India, Bhutan
MNT	₮	Tugrik	Mongolia
PHP	₱	Peso	Philippines
PYG	₲	Guarani	Paraguay
UAH	₴	Hryvnia	Ukraine
VND	₫	Dong	Vietnam

> **Note:**
>
> If one of the above currency codes was not specified when the order was created, no currency symbol is included in the email notification.

17 Oracle Legal Notices

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