Oracle® Retail Order Broker Cloud Service

Release Readiness Guide

Release 23.1.101.0

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ORACLE®

Contents

Preface

Oracle Retail Order Broker Cloud Service includes the following modules:

- Routing Engine: Distributed order broker that determines inventory availability across the enterprise, and uses advanced business rules to select locations that can fulfill orders.

- Supplier Direct Fulfillment: Web-based vendor portal enabling vendors to share purchase orders and shipping information to simplify drop shipment.

- Store Connect: Web portal that enables store associates to process and fulfill omni-channel orders.

Overview

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

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

Audience

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

Documentation Accessibility

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

Customer Support

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

https://support.oracle.com

When contacting Customer Support, please provide the following:
- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Oracle Help Center (docs.oracle.com)

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

Comments and Suggestions

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

Oracle Retail Cloud Services and Business Agility

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

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

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

1
Feature Summary

The enhancements below are included in this update.

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

Column Definitions

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

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

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

Feature	Scale	Customer Action Required
User Interface Enhancements	larger	Use screens in Modern View if needed
Additional Screens Moved to Modern View	smaller	None
Modern View Screen Changes	smaller	None
System Management Enhancements		
Database Updates	smaller	None
"From" Email Address Changes	smaller	Optionally, specify an email alias to use for Store Connect or system emails
Performance Enhancements	smaller	None
Routing Engine Enhancements		

Feature	Scale	Customer Action Required
Additional Attributes Available for Probability Rules	smaller	Optionally, set up probability rules using the new attributes
Web Service Enhancements		
Foundation and Shipping Data Web Service Access	larger	Optionally, assign required scopes for inquiry and updates in order to use web services
Order Metrics Web Service	smaller	Optionally, use the new web service to get order metrics

Additional Screens Moved to Modern View

The following screens are now available in Order Broker Modern View, and the corresponding options are no longer available in Classic View.

- Attribute Definitions. Note that with this update:
  - The Last Updated date will be presented in the database time zone.
  - Once an attribute definition is In Use, specific list values and the attribute itself cannot be deleted due to dependant data. The attribute definition must first be removed from all products and/or locations.
  - The Manage Attribute Definition screen to review and delete attribute assignments to products and locations is no longer available.
- External Services. Note that with this update:
  - The Manage External Services screen has been renamed to External Services in Modern View.
  - The Shipping external service must be managed in Modern View and then is available for assignment at the Shipping tab of the Store Connect Preferences screen for an organization in Classic View.
- Location Types. Note that with this update, deleting a location type through the user interface is not currently enabled.
- Organizations. Note that with this update:
  - The Organizations and Preferences screen no longer includes the options to create or work with an organization. You must use the new Modern View screen instead. However, you still need to select the Organizations and Preferences option in Classic View to work with the preferences for each organization.

- – The Organizations and Preferences role now controls access to both the Organizations and Preferences screen in Classic View and the Organizations screen in Modern View.

- – You cannot delete the only existing organization in your Order Broker environment, or if system is assigned.

- – Data formats on reports and in administrative emails use the newly expanded list of available locales.

- – Language on reports and in administrative emails use the translation associated with the matching language from the list of supported languages (12) in the Operations Guide (MOS ID 2114324.1).

- – The organization address and return address are optional and not currently implemented.

> **Important:**
>
> Oracle recommends that you advance to the new Organizations screen in Modern View and use the Edit Organization window to verify or update the locale for your organization. When you select OK at the Edit Organization window, this updates the data formats for the organization to those defined for the selected locale.

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

As in Classic View, secured role authority to each of these options is required under the Retailer role type. If the user does not have authority to an option, the Modern View home page does not display it.

> **Important:**
>
> To avoid a potential Store Connect processing error, you should not delete a carrier at this time. If you accidentally delete a carrier, you should recreate it using the exact same code.

> **Note:**
>
> To support each of the above foundation data types, changes to the related database tables were made. Please consider performing minimal acceptance testing where this data is used across Order Broker, Store Connect and Supplier Direct Fulfillment.

Modern View Screen Changes

The following changes have been made to Modern View screens:

- **Order reason code deletion:** Added the ability to delete a reason code at the Order Reason Codes screen, provided it is not specified as the *Auto Cancel Reason* at the Fulfillment tab of the Preferences screen.

> ✎ **Note:**
>
> You can delete a reason code only if it has not been used to cancel or reject any orders, and if it is not specified as the *Auto Cancel Reason* at the **Fulfillment** tab of the **Preferences** screen.

- **Order reason code type specified:** Changed the add, change, and display Order Reason Code windows to indicate the type of reason code (Cancel or Reject) as well as incorporating the changes described above. For example, the View Order Reason Codes window is now entitled the View Cancel Order Reason Code window or the View Reject Order Reason Code window, depending on the type of reason code.

- **Carrier code deletion:** With this update, a carrier code can now be deleted from the Modern View Carriers screen when:

  - It is not specified as the Default Carrier within the Order Broker Preferences screen.

  - It is not the PICKUP carrier for Store Connect.

> ❗ **Important:**
>
> To avoid a potential Store Connect processing error, you should not delete a carrier if it is assigned to an order. If you accidentally delete a carrier, you should recreate it using the exact same code.

- **Updating the default box flag (Store Connect or Vendor Portal) for boxes:**

  If another box definition previously had the *Default in Store Connect* flag selected, and you select this flag for a different box definition, the flag for the previous default is cleared. Similarly, if another box definition previously had the *Default in Vendor Portal* flag selected, and you select this flag for a different box definition, the flag for the previous default is cleared.

- **Window title changes:**

  - Changed the word "Create" to "Add" when you are adding a new box, brand, carrier, or order reason code. The word "Add" is displayed rather than "Create" when you select the plus sign at the top of the screen, and it is displayed in the window title that opens.

  - Changed the name displayed for each type of record in an add, change, or display window to be singular rather than plural.

    Examples: The Create Boxes window is now entitled the Add Box window, and the View Brands window is now entitled the View Brand window.

Database Updates

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

"From" Email Address Changes

In order to ensure uninterrupted email generation, emails generated by Oracle omnichannel products, including Order Broker, now use a single email "from" address, such as no-reply-omni@oracledomain.com. The "from" email address is defined by Oracle and cannot be changed. You can now specify an alias to display with the "from" address for the email, for example, `My Email Alias <no-reply-omni@oracledomain.com>`.

You can specify the following email aliases:

- Store Connect emails: Use the new *Cust Service From Email Address Alias* field at the **Email** tab of the Store Connect Preferences screen. This field replaces the *Cust Service From Email Address* field. The Retailer Email Address at this tab is not used.

- Administrative emails: Use the new *From Email Alias* field in the **Email Settings** area of the Event Logging screen. This field replaces the *From Email* field.

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.

Your entry for an email alias 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, Order Broker generates emails using the "from" 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.

Additional Attributes Available for Probability Rules

With this update, you can now use a product location's *Status*, *On Clearance*, *Selling Price*, and *Cost* settings as criteria for probability rules.

Examples:

- If *Status* = Active
- If *On Clearance* = Yes
- If *Selling Price* > 100.00 or If *Cost* < 25.00

Rules using the new attributes apply in the same situations as rules using existing attributes to filter locations when shopping or re-shopping orders, responding to locate items and product availability requests, and inventory quantity exports. Also, *Cost* and *Selling Price* are available to use when setting up calculations.

Foundation Data Web Service Access

Working with certain foundation and external service data is now available through web services in addition to Modern View screens. The data available to work with through web services includes:

- Attribute Definitions
- Boxes
- Brands
- Carriers
- Cancel or Reject Reason Codes
- External (Shipping) Services
- Location Types

The options available for the data include:

- Getting a list of records
- Adding a new record
- Getting a count of existing records
- Getting the information on a single record
- Updating a record
- Deleting a record
- Confirming whether a record exists

> **⚠ Important:**
>
> To avoid a potential Store Connect processing error, you should not delete a carrier at this time. If you accidentally delete a carrier, you should recreate it using the exact same code.

To support authority for the above web services, two new access options are available in the Edit Web Services window from the Manage External Application Access screen:

- *Foundation Read/Write:* Provides authority to update records as well as to perform inquiries. Grants foundation:rw scope in IDCS or OCI IAM.
- *Foundation Read Only:* Provides authority to perform inquiries, but does not provide authority to make any updates. Grants foundation:r scope in IDCS or OCI IAM.

> **✎ Note:**
>
> Additional new scopes have been added in IDCS or OCI IAM, but these additional scopes are not currently used.

For more information, see the Operations Guide on My Oracle Support (DocID 2114324.1).

> **✎ Note:**
>
> In order to make the user interface consistent with the maximum field lengths in the web service and in the database, the following fields have been increased at the Add, Edit, and Display Brands windows:
>
> - Description: increased from 60 to 128
> - Code: increased from 10 to 20
> - Contact Name: increased from 40 to 128
> - Address Lines: increased from 50 to 128
> - Suite: increased from 9 to 20
> - City: increased from 35 to 128
> - State/Province: increased from 3 to 10
> - Postal Code: increased from 10 to 20
> - Company: increased from 50 to 128
> - Contact Name: increased from 40 to 128

Order Metrics Web Service

Added a new web service to convey the order metric information that is currently displayed on the Tenant screen for a retailer (non-admin) user, including order volume and merchandise locator volume totals for each month of the current and prior year.

Performance Enhancements

Enhanced the performance of the product location import step in the product import.

Improved the performance of order search requests.

2
Resolved Issues

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

Imports and Exports

Bug ID	Description
34696285	Corrected the probable quantity export to factor in probable quantity rules using sales velocity, sell quantity multiple, minimum sell quantity, daily sell-through quantity, or shrink rate.
34725034	Corrected an error that occurred when using file storage for imports if there was an empty location file in the OROB-IMPORTS container.
34797012	Changed the length of the POSTAL_CODE in the ORG_LOCATION table to 20 positions to prevent an error that occurred for the location import when the postal code exceeded 10 positions.

Reports

Bug ID/ Issue ID	Description
34510356	Corrected the Location Import Errors report to run without error.
34756651	Corrected the Product Import report to display errors related to the system product or product being null.

Routing Engine

Bug ID/ Issue #	Description
34732488	Corrected an issue that prevented the Oracle Maps Cloud Service API from obtaining proximity calculations.

Store Connect

Bug ID	Description
33785570	Corrected an accessibility issue for all order list screens in Store Connect to have the screen reader indicate if no matching orders are found.

Bug ID	Description
34027254	Corrected the View Full Order screen to update the current Next Action for an order after the associate cancels the last open order line, resulting in the order status also changing to canceled. In this situation, if you clicked Accept, you returned to the All Orders screen, which displayed error message. A Next Action of Done is now displayed at the View Full Order screen after the associate cancels the last open order line, and the All Orders screen does not display an error.
34049031	Corrected the login process to use a store associate's selected location at login. An intermittent problem previously caused the associate's last used location to be retained.
34329002	Corrected the Ship Order screen to display an error message before the associate completes the shipment if an error occurs related to connection with the shipping service.
34357648	Corrected the login process to refresh a store associate's user roles at each login attempt, in case the role authority assigned to the user has changed.
34595031	Corrected generation of the store pickup notification email for pickup orders.
34863786	Corrected the View Full Order screen to display a Next Action of Done if there are no additional processing steps available in your current store location.

Supplier Direct Fulfillment

Bug/Issue ID	Description
34280861	Corrected the View Printed Pack Slip screen to clear the previously displayed records and display a message when you search by brand and there are no matching records.
34285116	Corrected the Select Purchase Orders screen to prevent logging errors when you select generating purchase orders by item and there are no matching purchase orders.
34620574	Corrected the Vendor Portal to support partial shipment of a purchase order line.
34649508	Enhanced the performance of displaying a shipped purchase order in the Vendor Portal.

System Processing

Bug ID/ Change ID	Description
12320	Changed system startup to automatically refresh the Endpoint URL for IDCS or OCI IAM displayed on the Tenant-Admin screen.
33698518	Changed the Identity Cloud User Synchronization job to no longer log an error if the system associated with a vendor or Store Connect user's assigned group in IDCS or OCI IAM does not exist in Order Broker.
34318782	Corrected an issue with user creation through initial login to Order Broker.
34475199	Changed the creation of the SHIP_TO_UPDATE record when a shipping address is changed in Store Connect to retain the full user ID of the user who performed the update without truncating.
34756268	Prevented an unnecessary error that was logged when you advanced to the Schedule Reports screen.

User Interface

Bug ID or Reference	Description
12036	Expanded the height of data displayed in tables on Modern View screens to make the information easier to read.
12217	Changed the fields on the Brands page and each of the Brand windows to display the Brand Description first, followed by the Brand Code.
12608	Changed the Add Box and Edit Box windows to supply entry of a length, width, or height up to 999.99 and as low as .01; otherwise, an error is displayed.
12692	Changed the options at the Delete windows in Modern View from "cancel" and "ok" to "Cancel" and "OK."
33680559	Changed the View Full Order screen in Store Connect to prevent requiring excessive tabbing to navigate the screen when using the keyboard.
34290772	Changed Order Broker screens to display only the first 30 positions of the user's name at the top of the screen in Modern or Classic View.
34294071	Changed the window displayed when you select to log out of Order Broker Classic View or Modern View to have a title of Confirm Logout with options to Logout of SSO or Cancel.
34294466	Changed the inactivity timeout message to be the same for Classic View and Modern View.
34304956	Corrected Order Broker to support logging back into Order Broker after you exit from another session, such as Store Connect, which automatically logs you out of your Order Broker session. Previously, you could not log back into Order Broker after being automatically logged out if you were in Modern View.
34305109, 34305138	Corrected the message displayed upon logout when using Russian.
34305113	Corrected the message displayed upon logout when using Chinese.
34305264	Corrected the translation of "Classic View" in the drop-down menu below the user name in Modern View.
34305333	Corrected the translation of the Confirm Logout prompt from Modern View.
34310064	Changed creation of brands to be case-insensitive when checking for a duplicate brand code in an organization. As a result, you can no longer create a brand with a code that matches the code of an existing brand, for example, ABCD and abcd.
34339317	Corrected the display of the cursor and the Active flag in Modern View when you used the Save and Create Another option.
34361442	Corrected the confirmation message displayed in Modern View when you change the description of a record, such as a carrier, to indicate the new description.
34491817	Corrected the creation of a carrier to apply the selected settings when you used the Save and Create Another option.
34491835	Corrected the creation of an order reason code to apply the selected settings when you used the Save and Create Another option.
34491890	Changed the Add Box window (formerly Create Boxes) to no longer default the length, width, or height; previously, these fields defaulted to 1 when you first opened the window and defaulted to your previous entries after you selected Save and Create Another. Also, removed the up and down arrows from each of these fields; you now need to enter a numeric value in each. If you enter a number with more than 2 decimal positions, the window rounds the decimal to 2 positions after entry.
34690559	Improved the accessibility of the View Full Order screen in Store Connect so that it no longer requires excessive tabbing.
34700354	Corrected the Save option at the Tenant-Admin screen to prevent the ability to click Save twice.
34774702	Added a clarifying note about invoice detail creation to Order Broker help, Vendor Portal help, and Operations Guide.
34962335	Corrected an issue that prevented the Preferences screen from loading in Chrome when you immediately selected an organization and location.

Web Services

2-4

Bug ID	Description
34549544	Changed fulfillment request processing to log an error but not fail when any of the orders to include in the response have order notes that were not created correctly.
34561378	Corrected web service processing for orders that include order notes, gift notes, or order line notes.
34756161	Corrected an error that was logged if the original_request_id tag was passed in the LocateItems request.

3

Browser Requirements and Compatibility

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

- Chrome (desktop)
- Microsoft Edge
- Firefox

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

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

Supported Oracle Products

Application	Latest Supported Version
Oracle Retail Xstore Point of Service	22.0+
Oracle Retail Order Management System Cloud Service (OROMS)	21.3+
Oracle Retail Integration Cloud Service (RICS)	23.0.101.0+
Oracle Retail Omnichannel Cloud Data Service (OCDS)	19.1+
Oracle Retail Store Inventory Management Cloud Service (EICS)	23.0.101.0+
Oracle Retail Merchandising Foundation Cloud Service (RMFCS)	23.0.101.0+
Oracle Maps Cloud Service	not versioned (Oracle SaaS solution)
Oracle Retail Data Store (RDS)	23.1.101.0+

4

Deprecation Advisory

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

With this update, the following screens have been removed from Classic View and are now available in Modern View:

- Attribute Definitions
- External Services
- Location Types
- Organizations

The above screens are in addition to the following screens, which were removed from Classic View and made available in Modern View in Order Broker Cloud Service 22.2.30.1:

- Boxes
- Brands
- Carriers
- Order Reason Codes

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