

# **Sterling Selling and Fulfillment Suite**

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## **Applications Configuration Guide**

**Release 9.1**



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## Introduction to Channel Applications Manager

This guide explains how to configure IBM® Sterling Call Center, IBM® Sterling Store, IBM® Sterling Web, and IBM® Sterling Field Sales applications using the rules provided in the Channel Applications Manager, based on your business requirement.

**Important:** It is assumed that you are familiar with the concepts and business functionality explained in the corresponding application's Concepts Guide.

You can configure the following applications using the Channel Applications Manager:

- ◆ Sterling Call Center
- ◆ Sterling Store
- ◆ Sterling Web
- ◆ Sterling Field Sales

**Notes:**

- ◆ It is recommended that you adjust the Java Console memory parameters based on your data set and usage in order to avoid runtime exceptions.
- ◆ One of the configurations that you can perform is specifying the time limit for which a user can remain logged in to the Sterling Call Center and Sterling Store application. The time-out parameters can be defined in the application server.

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# Configure IBM Sterling Call Center and IBM Sterling Store

This topic explains the various configurations supported by Sterling Call Center and Sterling Store.

## Configure Initial System Setup

An advanced system setup enables you to configure system-wide elements such as locales and units of measure. These rules are typically configured once during the start of an implementation.

Following is the list of configurations that you can perform:

- ◆ [Define Units of Measure for Quantity](#)
- ◆ [Define Units of Measure for Service Quantity](#)
- ◆ [Define Units of Measure for Dimension](#)
- ◆ [Define Units of Measure for Volume](#)
- ◆ [Define Units of Measure for Weight](#)
- ◆ [Define Units of Measure for Time](#)
- ◆ [Configure Installation Rules](#)
- ◆ [Define Locales](#)
- ◆ [Define Countries](#)
- ◆ [Define Languages](#)
- ◆ [Define Date Formats](#)
- ◆ [Define Time Formats](#)
- ◆ [Define Date and Time Formats](#)
- ◆ [Define Currencies](#)
- ◆ [Configure Currency Conversions](#)
- ◆ [Specify the IBM Sterling Web Version](#)

## Configuring an Enterprise Profile

An Enterprise represents the organization that owns and controls all the transactions. An Enterprise controls the flow of documents, such as a sales order, and is considered the owner of the document. Most business rules and fulfillment processes for an order are defined by the Enterprise. On a sales order, the Enterprise is also assigned the role of the Seller organization in most cases. However, in some cases, if a higher level organizational unit wants to control and enforce business rules or document flow of all its subsidiaries, that organizational unit is assigned an Enterprise role and its subsidiary organizations are assigned Seller and Buyer roles.

Even though most business rules are controlled by the Enterprise, pricing rules are always controlled by the Seller organization in both sales and purchase situations. For more information about defining enterprise attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

If implementing an enterprise to be used by the IBM® Sterling Selling and Fulfillment Foundation integration, the Account with Hub attribute must be populated with the Sterling Selling and Fulfillment Foundation application's StoreFront skin name. This is used when punching out to the Sterling Selling and Fulfillment Foundation application from within the Sterling Call Center and Sterling Store applications.

## Manage Supply Chain Network Model

You can define your complete catalog of product items including items, categories, and classifications. Use this configuration when the product items are maintained within the Sterling Selling and Fulfillment Foundation.

Following is the list of configurations that you can perform:

- ◆ [Define Shipping Nodes and Stores](#)
- ◆ [Define Carriers](#)
- ◆ [Define Vendors](#)
- ◆ [Configure the Fulfillment Network Model](#)
- ◆

## Manage Products and Categories

You can define your complete catalog of product items including items, categories, and classifications. Use this configuration when the product items are maintained within the Sterling Selling and Fulfillment Foundation.

Following is the list of configurations that you can perform:

- ◆ [Configure Units of Measure](#)
- ◆ [Manage Products](#)
- ◆ [Define Types of Product Classifications](#)
- ◆ [Define Classification Values](#)

## Configure Delivery and Installation

In addition to shipped products, you can manage the execution of delivery services and provided services.

Delivery Services are billable services that are directly associated with a product on a sales order or a return order. For example, the delivery of a high-definition television.

Provided Services are billable services that are offered to enhance the life or usability of a product associated with a sales order. For example, the application of fabric protection on a sofa or installation service for a home theater system.

Delivery Services and provided services are also defined as items by the Catalog Organization and are available to all organizations that share that Catalog Organization.

Following is the list of configurations that you can perform:

- ◆ [Define Slot Groups](#)

- ◆ Define Service Skills
- ◆ Define Delivery Service UOM Master
- ◆ Define Delivery Service Types
- ◆ Define Options Offered with Delivery Services
- ◆ Define Installation Service of UOM Master
- ◆ Define Installation Service Types
- ◆ Configure Options Offered with Installation Services
- ◆ Define Address-Related Questions
- ◆ Define Types of Capacity and Service Classifications
- ◆ Configure Sourcing Rules for Delivery
- ◆ Define Node Groups for Installation Services
- ◆ Configure Sourcing Rules for Installation
- ◆ Define Resource Pools
- ◆ Configure Service Supervisors

## Define Customers

This configuration allows you to define B2B customers and consumers. These customers and consumers place orders with your business. This configuration provides additional information about the customers such as their appointment slot preferences, additional contact information, and answers to address questions, and so on.

Following is the list of configurations that you can perform:

- ◆ Configure Customer Rules
- ◆ Configure Contact Types
- ◆ Define Customer Definitions
- ◆ Define Titles

## Configure Order Promising Rules

This configuration defines the rules for making accurate customer order promises. It enables you to set up rules that control from where and when you ship a product. Sourcing rules provide you with control parameters at product, geography, order, and customer level so that the appropriate sourcing nodes are selected for fulfilling customers demand.

Following is the list of configurations that you can perform:

- ◆ Select Complexity Level Required for Sourcing Rules
- ◆ Define Fulfillment Types
- ◆ Define Order Sourcing Classifications
- ◆ Define Types of Sourcing and Procurement Classifications
- ◆ Define Scheduling Rules

- ◆ [Configure Landed Cost Computation Rules](#)
- ◆ [Configure Rules for Determining Forwarding or Transfers](#)
- ◆ [Define Node Groups](#)
- ◆ [Configure Sourcing Rules](#)
- ◆ [Define Node Groups for Transfers or Procurement](#)
- ◆ [Configure Sourcing Rules for Transfers or Procurement](#)
- ◆ [Configure Transit Time Computation Rules](#)

## Configure Payment Handling

This configuration enables you to define payment types that the application can accept and rules that control how the payments are processed in the system. This configuration also enables you to integrate with external payment processing systems such as CyberSource® or Chase™ Paymentech. Payment processing involves payment authorization, settlement, and invoicing.

Following is the list of configurations that you can perform:

- ◆ [Configure Basic Rules for Payment Handling](#)
- ◆ [Configure Payment Rules](#)
- ◆ [Define Payment Types](#)
- ◆ [Define Credit Card Types](#)

## Configure Order Administration

Once an order is captured it needs to be modified at various points throughout its life-cycle. For example, the customers may decide to have their order shipped to their work address instead of their home address, or a payment method that was declined could be replaced with another method. Also, if an order encounters a processing error, a CSR Lead may need to give a credit to a customer in order to keep the customer satisfied.

Sterling Call Center and Sterling Store understands the typical modifications that are frequently made to the orders, and provides a task-based call center user interface to perform these modifications.

You can also configure rules to control how and when modifications can be performed.

Following is the list of configurations that you can perform:

- ◆ [Configure Order Entry Rules](#)
- ◆ [Define Hold Types](#)
- ◆ [Configure Price Match Rules](#)
- ◆ [Configure Order Modification Rules](#)
- ◆ [Configure Work Order Modification Rules](#)
- ◆ [Define Appeasement Reasons](#)
- ◆ [Define Cancellation Reasons](#)
- ◆ [Define Reship Reasons](#)

- ◆ Define Price Override Reasons
- ◆ Define Charge Override Reasons
- ◆ Configure Open Box Options
- ◆ Define Order Note Types and Configuring Automatic Note Logging

Following is the list of advanced configurations that you can perform:

- ◆ Define Order Types and Line Types
- ◆ Configure Order Validations Required
- ◆ Configure Alternate Item Identifier Display
- ◆ Configure Add Line Rules
- ◆ Configure Available Gift Options
- ◆ Configure Address Verification Rules
- ◆ Configure Country and State Display Rules
- ◆ Define Instruction Types
- ◆ Define Custom Modification Types
- ◆ Configure which Modifications Trigger Re-pricing
- ◆ Define Charge Categories and Names
- ◆ Configure Transaction Specific Rules
- ◆ Configure Availability Check and Reservation Options
- ◆ Define Unit of Measure Display Rules
- ◆ Configure Print Options
- ◆ Configure User Interface Payment Handling
- ◆ Configure Special Order Modification Rules
- ◆ Configure Information Recorded During Level of Service Selection
- ◆ Configure Line Relationship Type
- ◆ Configure FTC Compliance
- ◆ Configure Price Match Statuses
- ◆ Configure Competitor Statuses
- ◆ Configure Bundle Components Display
- ◆ Configure External User Interface Rules
- ◆ Configure Display of Fulfillment Summary Screen
- ◆ Configure Order Tags for Sales Orders

## **Configure Store Pick Up Administration**

This configuration enables you to indicate if your enterprise allows store pick up.

Following is the list of configurations that you can perform:

- ◆ Configure Store Pick Up Rules

Following is the list of advanced configurations that you can perform:

- ◆ [Configure Verification Criteria](#)

## Configure Outbound Logistics

This configuration enables you to define carriers and rules that control outbound logistics including carrier services and shipment modes. You can accept, store, and manage the execution of a delivery plan accounting for complex, multi-step, multi-leg, and multi-mode movement of goods, including practices such as merge-in-transit, continuous movement, lane optimization and cross-docking. All activities among all parties are coordinated in the delivery chain, and events are pro-actively monitored and notified participants when deviations occur. Shipment and delivery records are tied to the original sales or purchase orders for management of dependencies among orders and shipments. Post-delivery reconciliation of performance, comparing actual with promised, SLA metric analysis, participant performance, and so on is provided.

Following is the list of configurations that you can perform:

- ◆ [Define Carriers](#)
- ◆ [Define Carrier Services](#)
- ◆ [Define Types of Routing Guide Classifications](#)
- ◆ [Configure Outbound Constraints](#)
- ◆ [Define Shipment Modes](#)
- ◆ [Configure Outbound Shipment Modification Rules](#)

## Configure Business Process Models and Monitoring Rules

The life-cycle of an order is long and complex. It starts with accurately capturing the customer's order into a system and then accurately fulfilling the order through delivery. After the customer receives their shipment, the order may need to be returned and the merchandise inspected to determine whether or not it can be repaired and placed back into inventory.

Orders go through a wide range of statuses throughout their fulfillment cycles. Orders are processed by transactions that perform modifications to the orders and their related entities such as shipments, invoices, and returns. These transactions also determine how an order moves from one status to the next. Additionally, an order in a particular status can go through a condition to determine which transaction should process it next.

An order's flow throughout its fulfillment cycle is represented graphically by a pipeline. The pipeline determines the statuses that an order can be in, which transactions process it, and which conditions it must go through in order to be fulfilled.

Following is the list of configurations that you can perform:

- ◆ [Configure Order Fulfillment Process](#)
- ◆ [Configure Shipping Process](#)
- ◆ [Configure Delivery and Installation Process](#)
- ◆ [Configure Return Fulfillment Process](#)



- ◆ [Configure Receipt Process](#)
- ◆ [Define Order Milestones](#)
- ◆ [Define Order Monitoring Events](#)
- ◆ [Define Milestones for Returns](#)
- ◆ [Define Monitoring Events for Returns](#)
- ◆ [Configure Transactions and Events for Inventory, Item, and UI](#)
- ◆ [Configure Document Types and Process Types](#)

## Configure Inventory Synchronization

When promising orders to customers, it can be challenging to offer them an exact inventory picture across all nodes. The inventory that is used to promise orders is not necessarily on-hand. It could be in transit or a purchase order could have just been placed and the retailer may feel comfortable with using a certain percentage of that future supply to fulfill the future demand.

Following is the list of configurations that you can perform:

- ◆ [Configure Inventory Related Rules](#)

Following is the list of advanced configurations that you can perform:

- ◆ [Configure Supply and Demand Types](#)
- ◆ [Configure Availability Safety Factors](#)
- ◆ [Configure how Supply and Demand are Changed with Order Status](#)
- ◆ [Configure Inventory Node Type Rules](#)

## Configure Return Administration

You can define the rules that control how returns can be modified and validated. Condition-based returns processing, including execution and management of associated processes, such as exchange orders, refurbishment and repair requests, and return disposition are delivered. With chained order capability, multiple returns can be linked or requests can be repaired to original sales orders, providing repair life-cycle tracking. Managing reverse inventory tracking back to the appropriate node based upon appropriate business rules is provided. You can handle return receipts, disposition, and initiate the crediting process.

Following is the list of configurations that you can perform:

- ◆ [Configure Return Order Modification Rules](#)
- ◆ [Define Return Reasons](#)
- ◆ [Define Charge Override Reasons](#)
- ◆ [Define Receiving Disposition Codes](#)
- ◆ [Configure Rules for Wrongly Shipped Items](#)
- ◆ [Configure Return Entry Rules](#)
- ◆ [Define Return Note Reasons](#)
- ◆ [Define Return Cancellation Reasons](#)

Following is the list of advanced configurations that you can perform:

- ◆ [Define Return Types and Return Line Types](#)
- ◆ [Configure Return Receipt Handling](#)
- ◆ [Define Charge Categories and Names](#)
- ◆ [Configure Extraneous Item/Wrong Item Rules](#)

## **Configure Alert Management**

Fully integrated event configuration, status and event monitoring, and alert handling capabilities are provided. The underlying mechanism for setting and monitoring conditions or events that drive transactional activity within the critical supply chain processes such as fulfillment, inventory management, and purchasing is also provided. The event engine enables processes to be modeled and managed based upon events occurring rather than within a pre-defined, hard-coded application procedure. Exceptions can be handled automatically as well as through configurable exception consoles with full tracking, automatic escalation and resolution with complete audit history.

Following is the list of configurations that you can perform:

- ◆ [Define Alert Types](#)
- ◆ [Define Alert Queues](#)
- ◆ [Configure User Alert Notifications](#)

## **Configure User Security**

This configuration provides the capability to ensure that each user accesses only the information that is appropriate for carrying out their tasks. A user is limited to access only those resources to which they have permission.

Following is the list of configurations that you can perform:

- ◆ [Define User Roles](#)
- ◆ [Define Users](#)

Following is the list of advanced configurations that you can perform:

- ◆ [Configure Teams](#)
- ◆ [Define Rules for Password Policies](#)
- ◆ [Configure Policy Parameters](#)
- ◆ [Define Password Authentication Questions](#)
- ◆ [Configure Password Policy Rules](#)

## Configure System Administration

The System Management module provides the following capabilities:

- ◆ Enables you to manage integration and agent servers, view the properties of your application servers, enable database caching, and increase trace log output for APIs, user exits, services, and agents.
- ◆ Provides features to administer and monitor various components.
- ◆ Provides a complete picture of Sterling Call Center and Sterling Store while it is running. Additionally, the health monitor agent can alert system administrators when a problem happens such as an application server going down or an agent server not processing tasks.

Following is the list of configurations that you can perform:

- ◆ [Configure System Purge Criteria](#)
- ◆ [Configure Sales Order Purge Criteria](#)
- ◆ [Configure Work Order Purge Criteria](#)
- ◆ [Configure Return Order Purge Criteria](#)
- ◆ [Define Agent Criteria Groups](#)
- ◆ [Define Initial Context Factory Codes](#)
- ◆ [Define View Servers](#)
- ◆ [Configure Health Monitor Rules](#)

Following is the list of advanced configurations that you can perform:

- ◆ [Configure Pagination Rules](#)
- ◆ [Configure Announcement Rules](#)
- ◆ [Define Qualified Tag Type](#)
- ◆ [Define Qualified Tags](#)
- ◆ [Configure Qualified Tag and Application Compatibility](#)
- ◆ [Configure Version-Specific Rules](#)
- ◆ [Configure Version-Specific Common Codes for Sales Orders](#)
- ◆ [Configure Version-Specific Common Codes for Return Orders](#)

## Extend and Customize the Application

You can extend and customize the application by creating new user interface resources, menus, themes, custom common codes, and customer error codes to meet your specific business needs.

Following is the list of configurations that you can perform:

- ◆ [Configure User Exit Management](#)
- ◆ [Customize the Application Menus](#)
- ◆ [Define Extended Application Resources](#)
- ◆ [Define Themes](#)
- ◆ [Define Custom Common Code Types](#)

- ◆ [Define Custom Common Codes](#)
- ◆ [Define Custom Error Codes](#)

## **Store-Specific Tasks**

This configuration enables you to configure all the specific tasks of a store belonging to this enterprise.

Following is the list of configurations that you can perform:

- ◆ [Define Store Users](#)
- ◆ [Configure Store Devices](#)
- ◆ [Configure Store Print Documents](#)
- ◆ [Configure Return Order Receiving Preferences](#)

Following is the list of advanced configurations that you can perform:

- ◆ [Configure Teams](#)
- ◆ [Configure Barcodes](#)
- ◆ [Configure Backroom Pick Rules](#)

---

## Configure the IBM Sterling Web Application

This topic explains the various configurations supported by the Sterling Web™ application

### Configure Initial System Setup

An advanced system setup has been provided that allows you to configure system-wide elements such as locales and units of measure. These will typically be configured once during the start of an implementation.

You can define and configure the following rules as part of this configuration:

- ◆ [Define Units of Measure for Quantity](#)
- ◆ [Define Units of Measure for Service Quantity](#)
- ◆ [Define Units of Measure for Dimension](#)
- ◆ [Define Units of Measure for Volume](#)
- ◆ [Define Units of Measure for Weight](#)
- ◆ [Define Units of Measure for Time](#)
- ◆ [Define Locales](#)
- ◆ [Define Countries](#)
- ◆ [Define Languages](#)
- ◆ [Define Date Formats](#)
- ◆ [Define Time Formats](#)
- ◆ [Define Date and Time Formats](#)
- ◆ [Define Currencies](#)
- ◆ [Configure Currency Conversions](#)

For more information about the above mentioned configurations, refer to the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

### Configure the Rules that Impact the Sterling Web Application User Interface

In the Channel Applications Manager, you can configure the rules that control the various aspects of the Sterling Web™ user interfaces. Following is a list of configurations that you can perform:

- ◆ [Configure the IBM Sterling Web Cart Rules](#)
- ◆ [Configure IBM Sterling Web User Rules](#)
- ◆ [Configure IBM Sterling Web Categories Display Rules](#)
- ◆ [Configure IBM Sterling Web Store Display Rules](#)

Apart from the above listed configurations, a user must perform tasks and configurations before the user can implement the functionalities provided by Sterling Web. For more information about these tasks and configurations, refer to the *Sterling Web Implementation Guide*.

---

## Configure the IBM Sterling Field Sales Application

This topic explains the various configurations and advanced configurations supported by the Sterling Field Sales application:

### Configure Initial System Setup

An advanced system setup has been provided that allows you to configure system-wide elements such as locales and units of measure. These will typically be configured once during the start of an implementation. You can configure the following rules as part of this configuration:

- ◆ [Define Units of Measure for Quantity](#)
- ◆ [Define Units of Measure for Service Quantity](#)
- ◆ [Define Units of Measure for Dimension](#)
- ◆ [Define Units of Measure for Volume](#)
- ◆ [Define Units of Measure for Weight](#)
- ◆ [Define Units of Measure for Time](#)
- ◆ [Configure Installation Rules](#)
- ◆ [Define Locales](#)
- ◆ [Define Countries](#)
- ◆ [Define Languages](#)
- ◆ [Define Date Formats](#)
- ◆ [Define Time Formats](#)
- ◆ [Define Date and Time Formats](#)
- ◆ [Define Currencies](#)
- ◆ [Configure Currency Conversions](#)

### Configuring an Enterprise Profile

You can define your company profile and basic rules that guide how the application operates. An Enterprise represents the organization that owns and controls all the transactions. An Enterprise controls the flow of documents and is considered the owner of the document.

For more information about defining enterprise attributes, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

### Manage Supply Chain Network Model

This captures participants in your supply chain model (such as your distribution centers, vendors, and delivery nodes). This model is used as metadata for making sourcing decisions.

- ◆ [Configure the Fulfillment Network Model](#)

- ◆ [Define Region Match Preferences](#)
- ◆ [Configure Region Levels](#)
- ◆ [Configure Region Schemas](#)

## Manage Products and Categories

Define your complete catalog of product items including items, categories, and classifications. Use this configuration when the product items are maintained within the Sterling Selling and Fulfillment Suite.

- ◆ [Configure Units of Measure](#)
- ◆ [Manage Products](#)
- ◆ [Define Types of Product Classifications](#)
- ◆ [Define Classification Values](#)
- ◆ [Define Association Types for an Item](#)

## Define Customers

This configuration enables you to define B2B customers and consumers. These customers and consumers place orders with your business. This configuration provides additional information about the customers such as their appointment slot preferences, additional contact information, and answers to address questions.

- ◆ [Configure Customer Rules](#)
- ◆ [Configure Contact Types](#)
- ◆ [Define Customer Definitions](#)
- ◆ [Define Titles](#)
- ◆ [Configure Customer Payment Method Rules](#)
- ◆ [Configure Consumer Rules](#)
- ◆ [Configure Customer Grades](#)

## Configure Payment Handling

This configuration enables you to define payment types that the application can accept and rules that control how the payments are processed in the system.

- ◆ [Configure Basic Rules for Payment Handling](#)
- ◆ [Configure Payment Rules](#)
- ◆ [Define Payment Types](#)
- ◆ [Define Credit Card Types](#)
- ◆ [Configure Payment Failure Rules](#)
- ◆ [Payment Processing Rules Determination](#)
- ◆ [Configure Advanced Credit Card Rules](#)

## Configure Quote Administration

You can configure the following rules as part of this configuration to modify and validate quotes:

- ◆ [Configure Quote Entry Rules](#)
- ◆ [Define Quote Hold Types](#)
- ◆ [Configure Quote Modification Rules](#)
- ◆ [Define Quote Abandonment Reasons](#)
- ◆ [Configure Quote Approval Plans](#)
- ◆ [Configure Quote Approval Rule Violation Reasons](#)
- ◆ [Define Quote Note Types and Configuring Automatic Note Logging](#)
- ◆ [Configure Proposal Templates](#)
- ◆ [Configure Proposal Formats](#)
- ◆ [Define Quote Types and Line Types](#)
- ◆ [Configure Quote Validations Required](#)
- ◆ [Define Quote Instruction Types](#)
- ◆ [Define Custom Quote Modification Types](#)
- ◆ [Configure which Modifications Trigger Re-pricing](#)
- ◆ [Define Charge Categories and Names](#)
- ◆ [Configure Financial Rules](#)
- ◆ [Configure Line Relationship Type](#)
- ◆ [Configure Order Tags for Quotes](#)
- ◆ [Configure Transaction Specific Rules](#)
- ◆ [Configure Quote Expiration and Recommended Item Rules](#)

## Configure Opportunity Administration

You can configure the following rules as part of this configuration to modify and validate opportunities:

- ◆ [Define Opportunity Note Reasons](#)
- ◆ [Define Opportunity Lead Origins](#)
- ◆ [Define Opportunity Lost Reasons](#)

## Configure Business Process Models and Monitoring Rules

Process modeling controls business workflow and provides the flexibility to thread together business transactions in a sequence that best represents your business environment. A single order document may go through multiple types of processes such as fulfillment, payment, and so forth.

You can configure the following rules as part of this configuration:

- ◆ [Configure Quote Fulfillment Process](#)



- ◆ Configure Opportunity Fulfillment Process
- ◆ Define Quote Milestones
- ◆ Define Monitoring Events for Quotes
- ◆ Configure Document Types and Process Types

## **Configure User Security**

- ◆ Define User Roles
- ◆ Define Users
- ◆ Configure Teams
- ◆ Define Rules for Password Policies
- ◆ Configure Policy Parameters
- ◆ Define Password Authentication Questions
- ◆ Configure Password Policy Rules

## **System Administration**

You can define the components required for daily maintenance and monitoring of the application including purge criteria, user exits, and health monitor rules.

- ◆ Configure Quote Purge Criteria
- ◆ Configure Opportunity Purge Criteria
- ◆ Define Agent Criteria Groups
- ◆ Define Initial Context Factory Codes
- ◆ Define View Servers
- ◆ Configure Health Monitor Rules
- ◆ Configure Pagination Rules

## **Extend and Customize the Application**

Extend the application by creating new user interface resources, menus, themes, custom common codes, and customer error codes.

- ◆ Configure User Exit Management
- ◆ Customize the Application Menus
- ◆ Define Extended Application Resources
- ◆ Define Themes
- ◆ Define Custom Common Code Types
- ◆ Define Custom Common Codes
- ◆ Define Custom Error Codes

---

## Access the Channel Applications Manager

To access the Channel Applications Manager:

1. Point your browser to `http://<hostname>:<portnumber>/smcfs/console/login.jsp`

Here,

- ◆ `hostname` is the computer name or IP address of the computer where the Sterling Selling and Fulfillment Foundation is installed.
- ◆ `portnumber` is the listening port of the computer where the Sterling Selling and Fulfillment Foundation is installed.

The browser displays the Sign In window.


2. Enter your login ID and password and click Sign In.
3. The Application Console Home Page is displayed. From the menu bar, choose Configuration > Launch Channel Applications Manager.
4. The Channel Applications Manager opens in a new window.

---

## The Channel Applications Manager Layout




The Channel Applications Manager is a graphical user interface that you can use to configure different aspects of the Sterling Selling and Fulfillment Foundation. The different configurations are defined by logical groupings that can be accessed from the Channel Applications Manager's main screen.

Each logical grouping focuses on a particular aspect of the Channel Applications Manager and contains rules, common codes, and settings necessary for the applications to work in a real-world business setting.

The Channel Applications Manager displays groupings by way of an information tree. To expand each grouping, click  located next to the group's name. When a group expands, each specific configuration associated with that group is displayed.

Next to each specific configuration, there is an icon, which indicates the user as to the progress of the configuration. When the cursor is placed over the icon, the current status of the configuration is displayed in a pop-up window.

The following table describes the different task icons.

Task Icon	Description
	This icon indicates that the task is not complete.
	This icon indicates that the task is complete.
	This icon indicates that the task is currently locked.

When you select a group that you want to configure, the Channel Applications Manager tree expands to display the available configuration rules for the selected group. Select a configuration that is not yet completed or still in progress. For certain configurations, under applications you can tweak some advanced configurations. To tweak these advanced configurations, select the Advanced Configuration hyperlink.

To view and change the configurations for a different enterprise organization, click the Load Configuration For Enterprise hyperlink. An organization may not be able to modify all the rules within the Channel Applications Manager based on the ownership of the individual configurations. For example, the installation level rules can be only modified by the Hub organization. Additionally, one Enterprise organization may inherit rules from another Enterprise. In such situations, the configuration can be only modified by the Enterprise that owns the organization, and not by the Enterprise that inherits the configuration. If the organization inherits a configuration from another organization, a hyperlink is displayed next to the configuration's name enabling the user to override the ownership of that configuration. If the organization has previously overridden the ownership, a hyperlink is displayed next to the configuration's name enabling the user to provide ownership back to the organization from where it was originally inheriting.



## Using the Online Help

To access the Channel Applications Manager's Online Help, select Help > Online Help.

## Troubleshooting Errors

You can view the description and cause of any error raised in the Channel Applications Manager, and the action to perform to overcome the error.

To view the Channel Applications Manager system error descriptions:

1. From the menu bar, select Help > Troubleshooting. The Error Search screen is displayed.
2. Enter the applicable search criteria and choose . A list of error codes and their descriptions is displayed.
3. Choose  to view the cause of the error and the action to perform to troubleshoot the error.

## Using Special Characters


In the Channel Applications Manager, there may be instances where you need to use special characters during data entry. The Sterling Selling and Fulfillment Foundation reserves key words and special characters that can be used internally. For information about using and handling special characters, see the *Sterling Selling and Fulfillment Foundation: Customization Guide*.

---

## Create a New Enterprise Organization

An Enterprise represents an organization that owns and controls all the transactions. The Enterprise controls the flow of documents, such as a sales order, and is considered as the owner of the document.

To create a new Enterprise:


1. From the Channel Applications Manager screen, select the Create A New Enterprise hyperlink. The Create Organization pop-up screen is displayed.
2. Enter information in the applicable fields.
3. Click . The new Enterprise is created.
4. Click the Load Configuration For Enterprise hyperlink. The Organization pop-up screen is displayed.
5. Choose the Enterprise organization from the Organization drop-down list.

---

## Define Units of Measure for Quantity

You can define units of measure for quantity.

To define units of measure for quantity:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Quantity UOMs.


For more information about defining the units of measure for quantity, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Units of Measure for Service Quantity

You can define units of measure for service quantity.

To define units of measure for service quantity:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Service Quantity UOMs.


For more information about defining units of measure for service quantity, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Units of Measure for Dimension

You can define units of measure for dimension.

To define units of measure for dimension:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Dimension UOMs.

For more information about defining units of measure for dimension, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.




---

## Define Units of Measure for Volume

You can define units of measure for volume.

To define units of measure for volume:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Volume UOMs.


For more information about defining units of measure for volume, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Units of Measure for Weight

You can define units of measure for weight.

To define units of measure for weight:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Weight UOMs.


For more information about defining units of measure for weight, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Units of Measure for Time

You can define units of measure for time.

To define units of measure for time:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Time UOMs.


For more information about defining units of measure for time, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Installation Rules

You can set up rules that need to be defined when the application is installed. This may include rules that determine how inventory items are identified and consolidated, provide flexibility in drop shipping orders, and provide capability to encrypt primary payment type attributes.

To configure the installation rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Configure Installation Rules.


For more information about defining installation rules, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Locales

You can define locales that enable businesses to associate them to multiple organizations and users.

To define a locale:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Locales.


For more information about defining locales, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Countries

You can set up commoncodes for country codes usedwhen setting up locales. This common code identifies the country that the locale is located in.

To define a country:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Countries.


For more information about defining country codes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Languages

You can set up common codes for language definitions used when setting up locales. This common code identifies the language used in the locale.

To define a language:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Languages.


For more information about defining language codes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Date Formats

You can set up common codes for date formats used when setting up locales. This common code format identifies the format how date is entered at a locale.

To define a date format:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Date Formats.

For more information about defining date formats, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.




---

## Define Time Formats

You can set up common code formats for time formats used when setting up locales. This common code format identifies how time is entered at a locale.

To define a time format:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Time Formats.


For more information about defining time formats, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Date and Time Formats

You can set up common code formats for date and time formats used when setting up locales. This common code format identifies the format how dates with time are entered at a locale.

To define a date time format:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Date Time Formats.


For more information about defining date/time formats, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Currencies

Currency definitions define symbols of each currency and indicate Euro currency membership and expiration date, if applicable.

To define a currency:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Currencies.


For more information about defining currency definitions, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Currency Conversions

Currency conversion enables you to set up exchange rates from one currency to another. These exchange rates are used to translate between currencies used by organizations as defined by their locale.

To configure a currency conversion:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Define Currency Conversions.


For more information about defining currency conversions, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Data Version Labels

To track the versions of configuration data, or set of changes made to the configuration data, you can create version labels for databases to capture changes from a source database, compare and deploy them onto a target database, which can be the same database or a different database.

To configure a data version label:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Select Configure Data Version Labels.



For more information about configuring data version labels, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Specify the IBM Sterling Web Version

You can specify the version of the Sterling Web application that you want associated with the Sterling Call Center and Sterling Store applications.

To specify the version of the Sterling Web application:

1. In the Channel Applications Manager, click  icon adjacent to Configure Initial System Setup to expand the branch.
2. Click the Advanced Configurations link.
3. Click Define Sterling Web Version.
4. Enter the Sterling Web application version in the Define The Sterling Web Version Associated To The Sterling Call Center and Sterling Store Application field.
5. Click  to save your changes.

---

## Configure an Enterprise Profile

An Enterprise represents the organization that owns and controls all the transactions. An Enterprise controls the flow of documents, such as a sales order, and is considered the owner of the document. Most business rules and fulfillment processes for an order are defined by the Enterprise. On a sales order, the Enterprise is also assigned the role of the Seller organization in most cases. However, in some cases, if a higher level organizational unit wants to control and enforce business rules or document flow of all its subsidiaries, that organizational unit is assigned an Enterprise role and its subsidiary organizations are assigned Seller and Buyer roles.

Even though most business rules are controlled by the Enterprise, pricing rules are always controlled by the Seller organization in both sales and purchase situations. For more information about defining enterprise attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.


If implementing an enterprise to be used by the Sterling Selling and Fulfillment Foundation integration, the Account with Hub attribute must be populated with the Sterling Selling and Fulfillment Foundation application's StoreFront skin name. This is used when punching out to the Sterling Selling and Fulfillment Foundation application from within the Sterling Call Center and Sterling Store applications.

---

## Define Shipping Nodes and Stores

You can define ship nodes from where products are shipped and delivered. You can create node types and classify them.

To define a shipping node and store:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click Define Shipping Nodes and Stores.

For more information about creating node types, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.




---

## Define Carriers

You can define carriers for your business. To define a carrier, create a carrier as the role for an organization and define the carrier attributes.

To define a carrier:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Select Define Carriers.


For more information about defining carrier attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Vendors

You can define vendors for your business. A vendor can be a seller organization, shipping node, or both. To define a vendor, choose Seller as the role for an organization and configure the seller attributes.

To define a shipping node and store:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Select Define Shipping Nodes and Stores.


For more information about defining seller attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure the Fulfillment Network Model

You can configure the fulfillment network model to describe the relationship between various supply chain participants.

To configure the fulfillment network model:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Select Configure Fulfillment Network Model.


For more information about configuring the fulfillment network model, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Region Match Preferences

As an advanced configuration, you can specify the level at which addresses can be matched with regions for each country.

To define the region matching preferences:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Region Match Preferences.


For more information about defining region match preferences, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Region Levels

A region level classifies regions into distinct categories. As an advanced configuration, you can specify region levels such as Country, State, County, City, and so forth, based on the levels at which you want to aggregate your regions, and define the address field that corresponds to a region level. Region levels also provide the capability to create a region hierarchy.

To configure the region levels:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Region Levels.


For more information about defining region levels, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Region Schemas

A region schema is the complete hierarchical set of regions that define a given geography. As an advanced configuration, you can configure a region as a specific territory. For example, you can define a region for a state, city, or town.

To configure a region schema:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Region Schemas.


For more information about defining region schemas, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Node Types

As an advanced configuration, you can define node types to allow a user to classify nodes into various categories.

To define a node type:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Define Node Types.


For more information about defining node types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure the Level of Service

As an advanced configuration, you can configure the levels of service that control the logistics for your business.

To configure the level of service:

1. In the Channel Applications Manager, click  icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Level Of Service.

For more information about configuring the levels of service, see the *Sterling Distributed Order Management: Configuration Guide*.




---

## Configure Units of Measure

You can configure standard units of measure to associate with your items and locales.

To configure units of measure:

1. In the Channel Applications Manager, click  icon adjacent to Manage Products and Categories to expand the branch.
2. Select Configure Units of Measure.


For more information about configuring units of measure, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Manage Products

You can manage the product items that you sell.

To manage the products:

1. In the Channel Applications Manager, click  icon adjacent to Manage Products and Categories to expand the branch.
2. Select Manage Products.


For more information about defining product items, see the *Catalog Management: Configuration Guide*.

---

## Define Types of Product Classifications

You can define the types of product classification that you require. To define the types of product classification, define a classification definition and associate an item attribute with it.

To define the types of product classification:

1. In the Channel Applications Manager, click  icon adjacent to Manage Products and Categories to expand the branch.
2. Select Define Types of Product Classifications.


For more information about defining classification definitions, see the *Catalog Management: Configuration Guide*.

---

## Define Classification Values

You can define various values for a classification type in a classification hierarchy.

To define the classification values:

1. In the Channel Applications Manager, click  icon adjacent to Manage Products and Categories to expand the branch.
2. Select Define Classification Values.


For more information about defining a classification hierarchy, see the *Catalog Management: Configuration Guide*.

---

## Define Alternate Identifications for an Item

As an advanced configuration, you can specify the types of alternate identification for an item.

To define alternate identification for an item:

1. In the Channel Applications Manager, click  icon adjacent to Manage Products and Categories to expand the branch.
2. Click the Advanced Configurations link.
3. Select Define Alternate Identifications for Item.
4. Select the appropriate option.


For more information about defining item alias types, see the *Catalog Management: Configuration Guide*.

---

## Define Association Types for an Item

As an advanced configuration, you can specify the association types for an item.

To define an association type for an item:

1. In the Channel Applications Manager, click  icon adjacent to Manage Products and Categories to expand the branch.
2. Click the Advanced Configurations link.
3. Select Define Association Types for Item.
4. Select the appropriate option.

For more information about defining item association types, see the *Catalog Management: Configuration Guide*.

---


## Configure Display of Model Items

As an advanced configuration, you can configure the display of model item attributes.

To configure display of model items:

1. From the Channel Applications Manager, select Manage Products and Categories.
2. Select the Advanced Configurations link.
3. Select Configure Display of Model Items.
4. Select the appropriate option. The following table describes the fields in the Configure Display of Model Items window.

Field	Description
Display With Radio Buttons	Select this option to display the attributes of the model item with radio buttons.
Display With List Boxes	Select this option to display the attributes of the model item with list boxes.
Preview	Based on the option chosen, a preview of the Style Items pop-up is displayed.



5. Click  to save your changes.

---

## Configure the Display of a Product Web Page for an Item

This is an advanced configuration that allows you to configure and display the URL of the product Web page pertaining to an item in the Item Details screen and the Line Summary screen.

To configure and display the URL of the product Web page pertaining to an item:

1. In the Channel Applications Manager, click  icon adjacent to Manage Products and Categories to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Display of a Product Web Page for an Item.
4. Select an asset type from the Asset Type To Be Used When Displaying The Product Web Page For An Item drop-down list. The asset type you select will be used to display the URL of the product Web page pertaining to an item.
5. Click  to save your changes.




---


## Configure Item Search Options

As an advanced configuration, you can configure the item search options. This configuration enables you to specify whether the users should search for all the items in the database or only for the items that are currently being sold. You can also configure barcodes and/or alternate item identifiers which can be scanned or entered into the item ID field.

To configure item search options:

1. In the Channel Applications Manager, click  icon adjacent to Manage Products and Categories to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Item Search Option.
4. Select the appropriate options. The following table describes the fields in the Configure Item Search Options window.

Field	Description
Search Through All Items	Select this option to allow users to search for all the items present in the database.
Search Through Items Currently Being Sold	Select this option to enable users to search only for items that are available in the current active search index.
Allow User To Search All Items in the Database Or Only Items Currently Being Sold	Select this option to allow users to either search for all the items in the database or only for the items that are available in the current active search index.
Enable the Scanning Of Items Using Barcode	Select this check box to allow users to search for an item using the alternate item identifiers.
Enable Availability Checks During Item Search To Be Performed Using Cached Inventory	Select this check box to check for item availability during an item search, using a cached inventory.


5. Click  to save your changes.

---

## Define Slot Groups

All delivery and installation promises are made against a time slot. You can define these slots against which appointment promises are made.

To define a slot group:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Slot Groups.


For more information about defining slot groups, see the *Sterling Global Inventory Visibility: Configuration Guide*.

---

## Define Service Skills

You can define a master list of service skills that can be associated to services offered.

To define a service skill:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Service Skills.


For more information about defining service skills, see the *Catalog Management: Configuration Guide*.

---

## Define Delivery Service UOM Master

Units of measure are the various units a delivery service can be offered in.

To define a delivery service UOM master:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Delivery Service UOM Master.


For more information about defining master units of measure, see the *Catalog Management: Configuration Guide*.

---

## Define Delivery Service Types

Delivery service types are used to determine the capacity UOM and complexity level of delivery services.

To define a delivery service type:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Delivery Service Types.


For more information about defining delivery service types, see the *Catalog Management: Configuration Guide*.

---

## Define Options Offered with Delivery Services

You can define a master list of options that are offered with various delivery services.

To define the options offered with delivery services:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Options Offered with Delivery Services.


For more information about defining delivery service options, see the *Catalog Management: Configuration Guide*.

---

## Define Installation Service of UOM Master

You can configure the units of measure an installation service can be offered in.

To define the installation service of UOM master:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Installation Service UOM Master.


For more information about defining master units of measure, see the *Catalog Management: Configuration Guide*.

---

## Define Installation Service Types

Provided service types are used to determine the capacity UOM and complexity level of provided services.

To define the installation service types:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Installation Service Types.

For more information about defining service types, see the *Catalog Management: Configuration Guide*.




---

## Configure Options Offered with Installation Services

You can define a master list of options that are offered with various installation services.

To configure options offered with installation services:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Configure Options Offered with Installation Services.


For more information about defining provided service options, see the *Catalog Management: Configuration Guide*.

---

## Select Region Usage for Resource Pools

As an advanced configuration, you can select the region schema that is used when defining the specific regions that a resource pool can service.

To select region usage for resource pools:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Click the Advanced Configurations link.
3. Select Region Used for Resource Pools.


For more information about defining region usage for resource pools, see the *Sterling Global Inventory Visibility: Configuration Guide*.

---

## Define Address-Related Questions

You can define a list of questions that helps in understanding the physical characteristics of a customer's location.

To define address-related questions:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Address-Related Questions.


For more information about configuring questions, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Types of Capacity and Service Classifications

You can configure product-level control parameters for setting up capacity and service association rules. You can choose the applicable product classifications to use for the purpose of capacity and service association.

To define types of capacity and service classification:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Types of Capacity and Service Classifications.


For more information about defining classifications, see the *Catalog Management: Configuration Guide*.

---

## Configure Sourcing Rules for Delivery

You can configure a set of sourcing rules that helps identify the location from where deliveries should be made for a given customer address.

To configure sourcing rules for delivery:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Configure Sourcing Rules for Delivery.


For more information about defining sourcing rules for delivery service items, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Node Groups for Installation Services

You can create a group of nodes that can be used when determining sourcing for installation services. This configuration is similar to configuring node groups for shipping products.

To define node groups for installation services:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Node Groups for Installation Services.


For more information about defining distribution groups, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Sourcing Rules for Installation

You can define a set of sourcing rules that helps identify the location from where installation services should be made for a given customer address.

To configure sourcing rules for installation:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Configure Sourcing Rules for Installation.


For more information about defining sourcing rules for provided service items, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Resource Pools

Resource pools represent sets of resources that provide the services.

To define resource pools:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Define Resource Pools.

For more information about defining resource pools, see the *Sterling Global Inventory Visibility: Configuration Guide*.




---

## Configure Service Supervisors

You can configure the supervisor that is associated with a node for a given seller organization.

To configure service supervisors:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Select Configure Service Supervisors.


For more information about configuring service supervisors, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Capacity Rules

As an advanced configuration, you can configure rules that affect capacity like setting the default capacity reservation expiration time.

To configure capacity rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Capacity Rules.


For more information about defining capacity rules, see the *Sterling Global Inventory Visibility: Configuration Guide*.

---

## Define Service Complexity Levels

As an advanced configuration, you can define service complexity levels for provided service items and delivery service items.

To define service complexity levels:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Click the Advanced Configurations link.
3. Select Define Service Complexity Levels.


For more information about defining service complexity levels, see the *Catalog Management: Configuration Guide*.

---

## Configure Additional Capacity

As an advanced configuration, you can configure additional capacity for a delivery service type and region level combination.

To configure additional capacity:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Additional Capacity.


For more information about defining additional capacity, see the *Catalog Management: Configuration Guide*.

---


## Configure the Delivery Appointment Calendar View

You can configure the default view of the appointment calendar and display it.

To configure the default view of the appointment calendar:

1. In the Channel Applications Manager, click  icon adjacent to Configure Delivery and Installation to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Delivery Appointment Calendar View.
4. Choose the appropriate options. The following table describes the fields in the Delivery Appointment Calendar View.

Field	Description
<b>Capacity Information</b>	
Limit Users to View Capacity for a Maximum of <number_of_days> Days	Check this box and enter the maximum number of days you want to allow the users to view the capacity information. If you check this box, the user can view the capacity information for the specified number of days. If you uncheck this box, the user can view the capacity information for an infinite number of days or until the future capacity is unavailable.
<b>Calendar Display</b>	
Monthly View	Choose this option if you want the calendar to display the monthly view.
Display View for <number_of_weeks> Weeks	Choose this option and enter the number of weeks to display in the calendar. You may enter any number between 1 and 6. The default value is 0.
<b>Default Appointment Calendar View</b>	
Select Slot First, Then Choose the Day	Choose this option if you want to select the slot before selecting the day for service appointments.
Select Day First, Then Choose a Slot	Choose this option if you want to select the day before selecting a slot for service appointments.
<b>Preview</b>	
Based on the option chosen, a preview of the appointment calendar displays.	


5. Click  to save your changes.

---

## Configure Customer Rules

You can configure customer classifications that can be associated to customers as well as the slot group to use for defining customer slot preferences.

To configure customer rules:

1. In the Channel Applications Manager, click  icon adjacent to Define Customers to expand the branch.
2. Select Configure Customer Rules.


For more information about defining customer rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Contact Types

You can configure the contact types when specifying the contact information of a customer on work order notes.

To configure contact types:

1. In the Channel Applications Manager, click  icon adjacent to Define Customers to expand the branch.
2. Select Configure Contact Types.


For more information about defining contact types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Customer Definitions

You can define the B2B customers and consumers that place orders with your business.

To define customer definitions:

1. In the Channel Applications Manager, click  icon adjacent to Define Customers to expand the branch.
2. Select Define Customer Definitions.

For more information about defining customer definitions, see the *Sterling Distributed Order Management: Configuration Guide*.





---


## Define Titles

You can define the titles to be displayed in the Title drop-down on Address user interface screens.

To define titles:

1. In the Channel Applications Manager, click  icon adjacent to Define Customers to expand the branch.
2. Select Define Titles. The Title window is displayed.
3. Click  to add a new title. The Title Details pop-up window is displayed.
4. Enter information in the applicable fields. The following table describes the fields in the Title Details window.

Field	Description
Title	Enter the title.
Short Description	Enter a short description of the title.
Long Description	Enter a long description of the title.


5. Click  to save your changes.

---


## Configure Customer Search Rules

You can configure the default customer search screen to be used while identifying a customer.

To configure customer type rules:

1. In the Channel Applications Manager, click  icon adjacent to **Define Customers** to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Customer Search Rules.
4. Enter information in the applicable fields. The following table describes the Customer Type Rules.

Field	Description
Display screen which performs advanced customer search	Select this option to use the advanced customer search screen.
Display screen which performs address search	Select this option to use the address search screen.
Display screen which performs basic customer search	Select this option to use the basic customer search screen.
Customer Type to Default in Search	Select one of the following as default customer type: Consumer or Business. This option is enabled only if you select the basic or advanced customer search screens.



5. Click  to save your changes.

---

## Configure Customer Payment Method Rules

As an advanced configuration, you can configure customer display rules. This configuration provides a user with the option of storing the payment method information pertaining to a customer and display it on the application interface.

To configure customer display rules:


1. In the Channel Applications Manager, click  icon adjacent to **Define Customers** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Customer Payment Method Rules**.
4. Select the **Allow Customer Payment Method Information To Be Stored And Used Through The Interface** check box to store the payment method information pertaining to a customer and to display it on the application interface.
5. Click  to save your changes.

---

## Configure Consumer Rules

You can configure a rule that defines a default user role to be assigned when creating consumer customers. User roles define the permissions that the user will have when accessing any of the applications.


To define a default consumer user role:

1. In the Channel Applications Manager, click  icon adjacent to **Define Customers** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Consumer Rules**.
4. Select a user role from the **Select A Default Consumer User Role** drop-down list. The following table describes the field in the Consumer Customer Rules.

---

Field	Description
Select A Default Consumer User Role	Select a default user role that you want to assign to consumer customers.

---


5. Click  to save your changes.

---

## Configure Customer Grades

You can configure customer grades which when assigned to customers enables you to offer discounts based on the customer's rating.

To define customer grades:

1. In the Channel Applications Manager, click  icon adjacent to **Define Customers** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Customer Grades**.


For more information about configuring customer grades, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Select Complexity Level Required for Sourcing Rules

You can determine how to make sourcing decisions at a high level.

To select the level of complexity required for sourcing rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Complexity Required for Sourcing Rules.


For more information about defining basic sourcing configuration, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Fulfillment Types

Fulfillment types define the rules for making accurate customer order promises.

To define fulfillment types:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Define Fulfillment Types.


For more information about defining fulfillment types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Order Sourcing Classifications

This provides another control parameter that can be used when setting up sourcing rules.

To define order sourcing classifications:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Define Order Sourcing Classifications-.

For more information about defining order sourcing classifications, see the *Sterling Distributed Order Management: Configuration Guide*.




---

## Define Types of Sourcing and Procurement Classifications

You can configure product-level control parameters for setting up sourcing and procurement rules. In this configuration, you choose which product classifications should be used for the purposes of sourcing and procurement.

To define the types of sourcing and procurement classifications:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Define Types of Sourcing and Procurement Classifications.


For more information about defining classifications, see the *Catalog Management: Configuration Guide*.

---

## Define Scheduling Rules

Scheduling rules control when an order is scheduled and what constraints should be applied when scheduling an order.

To define scheduling rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Define Scheduling Rules.


For more information about defining scheduling rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Landed Cost Computation Rules

You are provided with highly advanced optimization algorithms that can use landed cost computations to select shipping nodes that minimize the cost.

To configure the rules of landed cost computation:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Configure Landed Cost Computation Rules.


For more information about configuring landed cost optimization, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Rules for Determining Forwarding or Transfers

You can set up rules that control how product transfers should be handled between two nodes.

To configure the rules that determine forwarding and transfers:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Configure Rules for Determining Forwarding/Transfers.


For more information about defining forwarding/transfer rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Node Groups

You can define sets of nodes that represent a logical group. The logical group can then be used in your sourcing rules.

To define node groups:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Define Node Groups.


For more information about defining distribution groups, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Sourcing Rules

You can configure sourcing rules to determine the node, external organization, or group of nodes to use to ship a product.

To configure sourcing rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Configure Sourcing Rules.


For more information about defining sourcing rules for product items, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Node Groups for Transfers or Procurement

You can create a group of nodes that can be used when determining sourcing for transfers or procurements. This configuration is similar to configuring node groups for shipping products.

To define node groups for transfers or procurement:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Define Node Groups for Transfers/Procurement.


For more information about defining distribution groups, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Sourcing Rules for Transfers or Procurement

You can configure rules to determine the nodes from where a transfer or procurement can be made to a given shipping node when enough inventory is not available in the shipping node.

To configure sourcing rules for transfers or procurement:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Configure Sourcing Rules for Transfers/Procurement.

For more information about defining procurement rules, see the *Sterling Distributed Order Management: Configuration Guide*.




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## Configure Transit Time Computation Rules

You can specify how transit time is calculated for the order scheduling operation.

To configure transit time computation rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Select Configure Transit Time Computation Rules.


For more information about defining logistics attributes, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Miscellaneous Scheduling and Reservation Rules

As an advanced configuration, you can configure miscellaneous scheduling and reservation rules. These rules control the behavior of order reservation and scheduling.

To configure miscellaneous scheduling and reservation rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Miscellaneous Scheduling and Reservation Rules.


For more information about defining fulfillment rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Select Region Schema used for Order Promising

As an advanced configuration, you can select the region schema used for order promising. Regions provide a geography level control parameter in sourcing rules.

To select the region schema that is used for order promising:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Click the Advanced Configurations link.
3. Select Region Schema used for Order Promising.


For more information about defining sourcing region selection, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Override Promising Parameters for Individual Items

As an advanced configuration, you can override promising parameters for individual items, such as minimum notification time.

To override promising parameters for individual items:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Click the Advanced Configurations link.
3. Select Override Promising Parameters for Individual Items.


For more information about defining item level controls, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Override Promising Parameters for Individual Nodes

As an advanced configuration, you can override promising parameters, such as minimum notification time, at the ship node level.

To override promising parameters for individual nodes:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Promising Rules to expand the branch.
2. Click the Advanced Configurations link.
3. Select Override Promising Parameters for Individual Nodes.

For more information about defining node level controls, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Basic Rules for Payment Handling

You can configure general rules for payment handling.

To configure general rules for payment handling:

1. In the Channel Applications Manager, click  icon adjacent to Configure Payment Handling to expand the branch.
2. Select Configure Basic Rules for Payment Handling.


For more information about defining additional payment rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Payment Rules

You can configure payment rules to determine how authorizations and charges are handled at a high level.

To configure payment rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Payment Handling to expand the branch.
2. Select Configure Payment Rules.

For more information about defining payment rules, see the *Sterling Distributed Order Management: Configuration Guide*.


---

## Define Payment Types

You can define various tender types that your business accepts.

To define payment types:

To configure general rules for payment handling:

1. In the Channel Applications Manager, click  icon adjacent to Configure Payment Handling to expand the branch.
2. Select Payment Types.

For more information about defining payment types, see the *Sterling Distributed Order Management: Configuration Guide*.





---

## Define Credit Card Types

This configuration allows the configuring of different credit card types.


To configure credit card types:

To configure general rules for payment handling:

1. In the Channel Applications Manager, click  icon adjacent to Configure Payment Handling to expand the branch.
2. Select Define Credit Card Types.
3. Click  to add new credit card types.

Enter information in the applicable fields. The following table describes the fields in the Credit Card Type Details window.

Field	Description
Credit Card Type	Enter the type of the credit card.
Short Description	Enter a short description of the credit card type.
Long Description	Enter a long description of the credit card type.


4. Click  to save your changes.

---

## Configure Payment Failure Rules

This is an advanced configuration that allows you to configure payment failure rules.

To configure payment failure rules:


1. In the Channel Applications Manager, click  icon adjacent to Configure Payment Handling to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Payment Failure Rules.

Enter information in the applicable fields. The following table describes the field in the Payment Failure Rules window.

---

Field	Description
Send notification when number of payment failures reach <n> due to hard decline	Enter the number of payment failures to be reached before notification is sent out.

---


4. Click  to save your changes.

---

## Payment Processing Rules Determination

This is an advanced configuration that allows you to configure the payment processing rules at the enterprise level or seller organization.

To configure the payment processing rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Payment Handling to expand the branch.
2. Click the Advanced Configurations link.
3. Select Payment Processing Rules Determination.


For more information about payment processing rules determination, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Advanced Credit Card Rules

This configuration allows the configuring of different credit card rules.


To configure credit card rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Payment Handling to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Advanced Credit Card Rules.
4. Enter information in the applicable fields. The following table describes the fields in the Advanced Credit Card Rules window.

---

Field	Description
Use A Single Input Field For When Entering The Name On Card Information On A Credit Card In the User Interface	Check this box to use a single field for displaying or entering card name.
Authorize Credit Cards Real Time On Draft Orders	Select Authorize Credit Cards Real Time On Draft Orders to process real time credit card authorizations before confirming draft orders.
Do not Authorize Credit Cards In Real Time	Select Do not Authorize Credit Cards In Real Time to process credit card authorization at a later time, using payment collection and payment execution agents.

---

5. Click  to save your changes.

---

## Configure Order Entry Rules

Channel Applications Manager provides an Order Entry Controller Wizard that enables you to configure the Order Entry user interface and the configuration choices for your order entry process.

To access the Order Entry Controller Wizard:

1. From the Channel Applications Manager, select Configure Order Administration.
2. Under Configure Order Administration, select Configure Order Entry Rules. The Order Entry Rules screen displays the current configuration choices for order entry.
3. To change the current or default order entry configuration, click Change Configuration. As you make decisions, the wizard displays information in two panels: the left panel displays the current decision choices you can make and the right panel displays a summary of all of the configuration choices you have made.
4. Select the screen on which you want to start the order entry task. To display the Customer Identification screen first during order entry, select the Show Customer Identification Step First option. To display the Item Entry screen first during order entry, select the Show Item Entry Step First option.

(This rule can also be used during return creation. If the customer details are not available when creating the exchange order, this rule can be used to determine whether the Customer Identification screen should be displayed before or after the Item Entry screen.)

5. In the Provide a default name to be used during order creation field, enter a name for the draft order. This name is automatically populated in the Confirm pop-up window that is displayed when a user attempts to close the Order Entry screen before completing the process of order creation.
6. Click Next.  
You are then prompted to indicate the type of Customer Search screen that should be displayed when identifying customers.
7. Select the Display Advanced Customer Search Screen option to display the advanced customer search screen.
8. Select the Display Address Search Screen option to display the address search screen.
9. Select the Display Basic Customer Search Screen option to display the basic customer search screen.
10. Click Next.

You are then prompted to indicate whether you want to allow users to enter tax options for a business customer. This screen is displayed only if the Display Advanced Customer Search Screen option is selected.

11. Select the Change Tax Options for a business customer check box to enable a user to enter tax options for a business customer.

12. Click Next.

You are then prompted to indicate the type of customer search you want to perform when identifying customers.

When users perform a customer search using an existing address, by default, both consumer customers and business customers are listed. You can indicate whether you want to include or exclude business customers from searches using the existing addresses.

13. Select the Enable Business Customer Search box, to enable search for business customers.

**Note:** This configuration is only applicable for sales order and exchange order.

14. Select Consumer to search for consumer customers by default. Select Business to search for business customers by default.

15. Click Next.

In this screen, you can choose to display the large order entry screen. It is designed to handle large numbers of order lines.

16. Select the Always display large order entry screen option to display the large order entry screen always.

17. Select the Display large order entry screen when the number of order lines is option and enter the number of order lines after which the large order entry screen needs to be displayed. If the number of order lines exceeds the preconfigured number and if more order lines are added to the order, the large order entry screen is displayed.

18. Select Never display large order entry screen, to not display the large order entry screen.

19. Click Next.

You are then prompted to indicate the fulfillment methods that need to be displayed and also the default fulfillment method for items on the order.

20. Select the Display Shipping and Delivery Fulfillment Options Separately box to display delivery and shipping as separate fulfillment options.

21. Select any one of the following options when entering items on an order:

- ◆ If you want to enable pick up as the default option, choose the 'Default Pick Up' option.
- ◆ If you want to enable shipping as the default option, choose the 'Default Shipping' option.
- ◆ If you want to enable delivery as the default option, choose the 'Default Delivery' option. This option is enabled only if you check the Show Delivery as Separate Fulfillment Method box.

22. Click Next.

You are then prompted to choose the columns to be displayed in the line entry screens.

23. Select the check boxes against the columns that you want to be displayed in the user interface for order line entries.

24. You can also configure where the focus of the cursor should shift to after adding an item to an order in the Add Item screen:

- ◆ Select the Focus on the next Item ID entry field option to shift the focus of the cursor to the next Item ID field. This option should be selected when most of the order lines have a single unit per order line.

- ◆ Select the Focus on the next enterable field (usually Quantity) option to shift the focus of the cursor to the next editable field. This option should be selected if you want to force the call center and store representatives to enter the quantity for each of the items entered in the order. This option is useful when the order lines have multiple quantities.

**Note:** If you have configured the screen to shift the focus of the cursor to the next editable field (usually Quantity) after adding an item to the order, and also configured the screen to not display the Line Quantity column in the line entry step, the Quantity is defaulted to one, but is not displayed to the user.

25. Select any of the following options to configure the number of blank order line panels to be displayed in the Add Items screen.

- ◆ Select the Set number of line panels to 3 (Default) option if you want three blank order line panels to be displayed in the Add Items screen.
- ◆ Select an appropriate value from the Set number of line panels to drop-down list if you want to display one or more blank order lines to be displayed in the Add Items screen. The values available in the drop-down list are 1, 2, 3, 4, and 5.

26. Click Next.

27. You can now configure to display the related items as a panel on the line entry screen or as a separate pop-up.

- ◆ Select A Panel On The Line Entry Screen option to display the related items as a panel.
- ◆ Select A Pop-up Window option to display the related items as a pop-up window.

28. Click Next.

You are then prompted to configure the item association types that you want to display on the Order Entry screen.

29. To configure item association rules and relationship types:

- ◆ Select the Show in UI check box to display the product items for that association type in the related items panel or pop-up.
- ◆ From the Item Association drop-down list, select one of the following options:
  - Relate Item: In the Related Items pop-up window or the Related Items panel in the Add Items screen, if the user selects an item with the corresponding association type, the item will be added as an associated item of the original item in the order.
  - Replace Item: In the Related Items pop-up window or the Related Items panel in the Order Entry screen, if the user selects an item with the corresponding association type, the original item will be replaced with the associated item.
- ◆ Select the Check Inventory check box to perform availability checks for the associated product item. If the inventory for the associated item is not available, the associated item will not be displayed in the related items panel or pop-up. If the check box is not selected, the associated item will be displayed in the panel or popup regardless of whether the inventory is available or not.

- ◆ Select the relationship type to be used when adding product items as related items.

To configure relationship type for a service association, select the relationship type to be used when adding provided services as related services.

30. Click the Finish button to close the Order Entry Controller wizard and save your settings.



---

## Define Hold Types

An order can be put on hold for multiple reasons. In this configuration, a user can define various types of holds that can be associated to an order. For more information about defining hold types, see the *Sterling Distributed Order Management: Configuration Guide*.


When a new hold type is defined, an exception type with the same name as the hold type must be created. As a result of this, links to the associated alerts that have been raised when an order goes on hold if there are any associated alerts for that event are displayed in the Remove Hold screen.

---

## Configure Price Match Rules


This configuration allows you to control the criteria that determines when a price match can be performed on an item in an order.

To configure price match rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Configure Price Match Rules.
3. Enter information in the applicable fields.

The following table describes the fields in the Price Match Rules Details window.

Fields	Description
Maximum Number Of Days After The Order Line Was Created To Allow Price Match	Enter the maximum number of days after an order date to allow price matching of an item.
Maximum No Hassle Unit Price Difference	Enter the maximum unit price difference for an order to qualify for no hassle price matching.
Maximum No Hassle Unit Price Difference (%)	Enter the maximum unit price difference percentage for an order to qualify for no hassle price matching.
Maximum No Hassle Line Quantity	Enter the maximum item quantity for an order to qualify for no hassle price matching.
Default Number Of Days For Price Matches To Expire	Enter the default number days allowed to pass before a price match expires.
Price Match Percentage Applied	Enter the price match percentage applied to an order.
Charge Category Representing Shipping Charges To Default On The Price Match Worksheet	Select the default charge category to be used in the price match work sheet from the drop-down list.
Price Match Recorded As	Select one of the following: Change in Order Line's Unit Price or Discount Charge on Order Line.
Charge Category	Select the charge category as Price Match from the drop-down list.
Charge Name	Select the charge name from the drop-down list.


4. Click  to save your changes.

---

## Configure Order Modification Rules

You can configure the types of modifications allowed on an order or an order line when it is in a given status.

To configure order modification rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Configure Order Modification Rules.


For more information about defining modification rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Work Order Modification Rules

Work orders are created for performing delivery and installation services.

To configure order modification rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Configure Work Order Modification Rules.


For more information about defining modification rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---


## Define Appeasement Reasons

This configuration provides a list of reason codes that are available during the customer appeasement process.

To define appeasement reasons:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Define Appeasement Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Appeasement Reason Details window.

Fields	Description
Appeasement Reason	Enter a name for the appeasement reason.
Short Description	Enter a short description of the appeasement reason.
Long Description	Enter a more detailed description of the appeasement reason.


4. Click  to save your changes.

---


## Define Cancellation Reasons

This configuration provides a list of reason codes that are available during the cancellation process.

To define cancellation reasons:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Define Cancellation Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Cancellation Reason Details window.

Fields	Description
Cancellation Reason	Enter a name for the cancellation reason.
Short Description	Enter a short description of the cancellation reason.s
Long Description	Enter a more detailed description of the cancellation reason.


4. Click  to save your changes.

---


## Define Reship Reasons

This configuration provides a list of reason codes that are available during the reship process.

To define reship reasons:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Define Reship Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Reship Reason Details window.

Fields	Description
Reship Reason	Enter a name for the reship reason.
Short Description	Enter a short description of the reship reason.
Long Description	Enter a more detailed description of the reship reason.


4. Click  to save your changes.

---

## Define Price Override Reasons


This configuration provides a list of reason codes that are available for price override.

To define price override reasons:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Define Price Override Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Price Override Reasons Details window.

---

Fields	Description
Price Override Reasons	Enter a name for the price override reason.
Short Description	Enter a short description of the price override reason.
Long Description	Enter a more detailed description of the price override reason.

4. Click  to save your changes.




---


## Define Charge Override Reasons

This configuration provides a list of reason codes that are available for charge override.

To configure charge override reasons:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Define Charge Override Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Charge Override Reason Details window.

Fields	Description
Charge Override Reasons	Enter a name for the charge override reason.
Short Description	Enter a short description of the charge override reason.
Long Description	Enter a more detailed description of the charge override reason.


4. Click  to save your changes.

---


## Configure Open Box Options

The open box items are defect items that were returned by the customers. Such items are put on display and sold at a discounted price. You can define how an enterprise handles open box items.

To configure the handling options for open box items:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Configure Open Box Options.
3. Enter information in the applicable fields. The following table describes the fields in the Configure Open Box Options window.

Fields	Description
Allow Addition of Open Box Items to Orders	Check this box if you want to allow users to add open box items to an order.
Tag Identifier for Open Box ID	Select the appropriate tag attribute from the drop-down list that identifies the open box items. Note: This option is available only if you check the 'Allow Addition of Open Box Items to Orders' box.
Product Class for Open Box Items	Select the appropriate product class from the drop-down list for the open box items.
Fulfillment Methods Supported for Open Box Items	Check the boxes of the appropriate fulfillment method for open box items. Pick Up—indicates to pick up open box items at a store. Shipping—indicates to ship open box items. Delivery—indicates to deliver open box items.



4. Click  to save your changes.

---


## Define Order Note Types and Configuring Automatic Note Logging

Channel Applications Manager provides an Order Notes Wizard that enables you to define note types and configure automatic note logging.

To access this wizard:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select Define Note Types and Configure Automatic Note Logging. The Order History Notes Wizard screen displays the current configuration choices for order notes.
3. To change the current or default order entry configuration, click Change Configuration. As you make decisions, the wizard displays information in two panels: the left panel displays the current decision choices you can make and the right panel displays a summary of all of the configuration choices you have made.
4. This screen displays all the note types that have been configured. To add a note type:
  - ◆ Click  to add a new note type.
  - ◆ Enter information in the applicable fields. The following table describes the Note Types fields.

Field	Description
Note Reason	Enter a name for the Note Reason.
Short Description	Enter a short description of the Note Reason.
Long Description	Enter a more detailed description of the Note Reason.

- ◆ Click  to save your changes.

After configuring the note types, you are prompted to choose when you want notes to be automatically logged.

5. Check the boxes of the hold types for which the note has to be automatically logged when the hold is added. Select the note type from the drop-down list. Enter the XSL translation file to be used.
6. Check the boxes of the hold types for which the note has to be automatically logged when the hold is resolved. Select the note type from the drop-down list. Enter the XSL translation file to be used.
7. Check the boxes of the hold types for which the note has to be automatically logged when the hold is rejected. Select the note type from the drop-down list. Enter the XSL translation file to be used.
8. On this screen you can enable notes to be automatically logged when an alert is raised against an order by checking the A new alert is raised against an order box. Select the note type from the drop-down list. Enter the XSL translation file to be used.

You can configure to log notes automatically when the status of an order is changed.

9. Check the Any order line quantity is backordered box to log notes automatically when the order status is changed to backorder. Select the note type from the drop-down list. Enter the XSL translation file to be used.
10. Check the Any order line quantity is shipped box to log notes automatically when the order status is changed to shipped. Select the note type from the drop-down list. Enter the XSL translation file to be used.

You can configure to log notes automatically when an appointment related action takes place.


11. Check the An appointment is completed box to log notes automatically when an appointment is completed. Select the note type from the drop-down list. Enter the XSL translation file to be used.
12. Check the An appointment is failed box to log notes automatically when an appointment fails. Select the note type from the drop-down list. Enter the XSL translation file to be used.
13. On this screen you can select a service that will be executed when a note is logged against an order. Choose the service to be executed from the drop-down list.
14. Click the Finish button to close the Order Notes Wizard and save your settings.

---

## Define Order Types and Line Types

As an advanced configuration, you can define order types and line types. Orders and order lines can be categorized into multiple types such as urgent, high priority, or normal.

To define order types and line types:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Define Order Types and Line Types.

For more information about defining order types, see the *Sterling Distributed Order Management: Configuration Guide*.


For more information about defining lines, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Order Validations Required

You can control the levels of validation required for an order. For more information about configuring a document's order validation, see the *Sterling Distributed Order Management: Configuration Guide*.

To configure the required order validations:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Order Validations Required.


For more information about configuring a document's order validation, see the *Sterling Distributed Order Management: Configuration Guide*.

---


## Configure Alternate Item Identifier Display

As a part of advanced configuration, you can configure to use alternate item identifiers for the same item.

To configure alternate item identifier display:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Alternate Item Identifier Display.
4. Enter information in the applicable fields. The following table describes the fields in the Configure Alternate Item Identifier window.

Field	Description
Store Alternate Item IDs on Order Lines	Select this box if you want to store the alternate item identifiers. This will allow you to scan the alternate item identifier and enhance the system to store and display.
Item Alias to Use for Alternate Item ID	Select the appropriate item alias for the alternate item ID that identifies the original item from the drop down list. For more information about defining item alias types, see the <i>Catalog Management: Configuration Guide</i> . You can select the item alias only if the Store Alternate Item IDs on Order Lines rule is enabled.


5. Click  to save your changes.

---

## Configure Add Line Rules

This is an advanced configuration that allows you to control the number of days (post order creation) after which line additions are not allowed.


To add line rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Add Line Rules.
4. Enter information in the applicable fields. The following table describes the field in the Add Line Rules window.

---

Field	Description
Maximum number of days after order date to allow adding an order line	Enter the maximum number of days after an order date to allow the adding of an order line.

---

5. Click  to save your changes.





---

## Configure Available Gift Options

This is an advanced configuration which enables you to configure the gift options.

To configure the gift options:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Available Gift Options.
4. Select the Items Being Shipped check box to indicate that the items that have a fulfillment method of Shipment can be gift items.
5. Select the Items Being Picked Up check box to indicate that the items that have a fulfillment method of Pick Up can be gift items.
6. Select the Items Being Delivered check box to indicate that the items that have a fulfillment method of Delivery can be gift items
  - ◆ To set the gift options for delivery items at the work order level, select the Work Order Level option.
  - ◆ To set the gift options for delivery items at the order line level, select the Order Line Level option.
7. To enable gift wrapping for items, select the Allow Gift Wrapping Of Items check box.
8. Click  to save your changes.



**Note:** When configuring gift options, ensure that you configure the "Change Mark For" and "Gift Flag Modifications" modification types in the Applications Manager.

---

## Configure Address Verification Rules

This is an advanced configuration that allows you to control the system behavior when the address verification system is not available.

To configure address verification rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Address Verification Rules.
4. Check the Keep the order on hold when the address verification system is down box.
5. Click  to save your changes.

---

## Configure Country and State Display Rules



You can configure the way the Country and State entry fields are displayed in certain screens in the Sterling Call Center and Sterling Store applications.

### Derive City and State Names using Country and Postal Code

When entering an address, the Country and Postal Code are used to derive the names of the City and State. To populate the City and State fields using the information provided in the Country and Postal Code fields, create a region schema that adheres to the following standards:

- ◆ The first level of the region schema must be Countries.
- ◆ The second level of the region schema must be States.
- ◆ The third level of the region schema must be Cities.
- ◆ The region-level names must be Country, State, and City.
- ◆ For more information about creating a region schema, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To select the region schema to use for deriving the City and State names using the Postal Code and Country:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Country and State Display Options.
4. Select the appropriate region schema from the Region Schema To Use For Defaulting City and State from Postal Codes drop-down list.
5. Click  to save your changes.

### Configure the State Drop-Down Menu


When entering an address, the Country drop-down list contains a list of all the countries. This drop-down list can be hidden if your enterprise accommodates only one country.

If you want a drop-down list of States to be displayed in Sterling Call Center and Sterling Store, create a region schema that adheres to the following standards:


- ◆ The first level of the region schema must be Countries.
- ◆ The second level of the region schema must be States.
- ◆ The region-level names must be Country and State.

When a country is selected from the Country drop-down list the system finds the corresponding region within the configured region schema representing that country. All child regions with a region level of State are shown in the State drop-down menu. If no region level of State is found, the State drop-down list changes to a text field to enable you to type the name of the state manually.

To configure the State drop-down list:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Country and State Display Options.
4. Select the appropriate region schema from the Region Schema To Use For State Selection drop-down list. The following table describes the fields in the Configure Country and State Display Rules.

Field	Description
Region Schema To Use For Defaulting City and State from Postal Codes	Select the region schema to be used to derive the City and State fields using the Country and Postal Codes.
Region Schema to Use for State Selection	Select a region schema to be used for the State drop-down list.
Allow Country to be Entered for Screens that Check Item Availability	Select this check box to facilitate the Country drop-down list to be displayed on the screens that check for item availability. <b>Note:</b> The Country drop-down list is always displayed in the Address panel.

5. Click  to save your changes.


**Note:** Ensure that the states configured in the Region Schema to Use for State Selection are same as the states configured in the Region Schema To Use For Defaulting City and State from Postal Codes.

---

## Define Instruction Types

As an advanced configuration, you can define a master list of instruction types.

To define the instruction types:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Define Instruction Types.


For more information about configuring a document's instruction types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Custom Modification Types

As an advanced configuration, the system categorizes all order modifications into modification type. All rules for controlling modifications are associated to these modification types. For more information about defining custom modification types, see the *Sterling Distributed Order Management: Configuration Guide*.

To define the custom modification types:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Define Custom Modification Types.


For more information about configuring a document's instruction types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configuring which Modifications Trigger Re-pricing

As an advanced configuration, you can identify modification types that must trigger order re-pricing. For more information about defining modifications impacting pricing, see the *Sterling Distributed Order Management: Configuration Guide*.

To configure the modifications that trigger re-pricing:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure which Modifications Trigger Re-pricing.


For more information about configuring a document's instruction types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configuring Transaction Specific Rules

As an advanced configuration, you can configure transaction specific rules. This is a miscellaneous set of rules that are associated to specific business transaction. For more information about defining transaction rules, see the *Sterling Distributed Order Management: Configuration Guide*.

To configure transaction specific rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Transaction Specific Rules.

For more information about configuring a document's instruction types, see the *Sterling Distributed Order Management: Configuration Guide*.




---

## Define Charge Categories and Names

As an advanced configuration, you can define various charge categories and names that are associated to an order.

To define the charge categories and names:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Define Charge Categories and Names.

For more information about defining charge definitions, see the *Sterling Distributed Order Management: Configuration Guide*.

As part of the IBM® Sterling Multi-Channel Selling Solution integration, to use the Order Pricing rules, you must configure the OSDISCOUNT and UPLIFT charge categories.


**Note:** For the Sterling Multi-Channel Selling Solution integration, it is recommended that the Charge Name validation be disabled. Otherwise, all the Coupon Names created in the application will need a corresponding Charge Name in Sterling Call Center and Sterling Store.

---


## Configure Availability Check and Reservation Options

You can specify when availability checks and item reservations occur.

To configure the availability check and reservation options:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Availability Check and Reservation Options.
4. Check the appropriate box to configure the availability check and reservation options. The following table describes the fields in the Availability Check and Reservation Options window.

Field	Description
Prevent Initial Availability Checks During Order Entry and Order Modifications. Availability Checks Will Be Performed Only on the Alternate Stores and Fulfillment Summary Screens	Check this box to perform an availability check in the Alternate Stores and Fulfillment Summary screens.
Prevent Availability Check When Searching for Items	Check this box to prevent an availability check when searching for an item.
Reserve Items During Order Entry and Order Modifications	Check this box to reserve items when entering or modifying an order.
Get Real Time Inventory For All The Child Items	Choose this option to perform an availability check when opening the Style Items pop-up window.
Get Cached Inventory For All The Child Items For Distribution Group ID	Choose this option and select the required distribution group ID from the drop-down list to perform an availability check of all the child items for the selected distribution group ID.

5. Click  to save your changes.


**Note:** The Inventory Check Required Rule is independent of the Prevent Initial Availability Checks During Order Entry Configuration. For more information about the Inventory Check Required Rule, see [Configure Order Entry Rules](#).

---

## Define Unit of Measure Display Rules


This is an advanced configuration that enables you to define which units of measure should be displayed in the application screens. Based on this configuration, either the transaction UOM or the inventory UOM is displayed.

To define the unit of measure display values:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Select the Advanced Configurations link.
3. Select Define Unit Of Measure Display Rules.
4. Choose the applicable Unit Of Measure display rules. The following table describes the fields in the Unit of Measure Display Rules window.

---

Field	Description
The Unit Of Measure In Which The Order Was Placed	Choose this option to display the order line UOM as it is specified on the order.
The Unit Of Measure In Which Inventory Is Stored	Choose this option to display the order line UOM as it is maintained for the item in inventory.
Do Not Show Unit of Measure	Choose this option to not display the UOM of an order line.


5. Click  to save your changes.

---


## Configure Print Options

You can specify when an order invoice is printed.

To configure order invoice print options:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Print Options.
4. Select the appropriate radio button to configure when an order is printed. The following table describes the fields in the Configure Print Options window.

Field	Description
Automatically Printing	Choose this option to automatically print a change order slip after each order.
Prompting the User to Print	Choose this option to prompt the user to print a change order slip after every order modification.
Never Printing	Choose this option to never prompt the user and never automatically print a change order slip.


5. Click  to save your changes.

---

## Configure User Interface Payment Handling

You can specify whether external payments are external to the call center, store, or external to both.


To configure external payment options:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure User Interface Payment Handling.
4. Check the appropriate box to specify if payment is handled externally to the call center or the store user interface. The following table describes the fields in the Configure User Interface Payment Handling window.

---

Field	Description
Payment is External to the Call Center	Select this box to specify that Sterling Call Center and Sterling Store handles payments externally to the Call Center.  When this option is selected, Sterling Call Center and Sterling Store does not prompt the user to enter payment information when creating or modifying an order at the call center. It is assumed that the payment is handled in the store or by an external system such as a point-of-sale system.  <b>Note:</b> If you check this box, ensure to check the "Payment is External to the Store" box.
Payment is External to the Store	Select this box to specify that Sterling Call Center and Sterling Store handles payments externally to the Store.  When this option is selected, Sterling Call Center and Sterling Store does not prompt the user to enter payment information when creating or modifying an order in the store. It is assumed that the payment is handled at the call center or by an external system such as a point-of-sale system.

---

5. Click  to save your changes.


**Note:** If payment is handled externally ensure to remove permissions for the Add Payment, View Payment Details, and Change Payment Method tasks.

---


## Configure Special Order Modification Rules

You can configure to allow cancellation or modification of fulfillment options for delivery and pick up order lines that are beyond the released status.

To configure the modification rules for delivery and pick up lines that are released:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Special Order Modification Rules.
4. Check the appropriate box to allow modification or cancellation. The following table describes the fields in the Configure Special Order Modification Rules window.

Field	Description
<b>Order Lines Being Picked Up</b>	
Allow Modification of Fulfillment Options For Pick Up Lines after Release	Check this box to enable the modification of fulfillment options for pick up lines after they are released.
Allow Cancellation of Pick Up Lines after Release	Check this box to enable the cancellation of pick up lines after they are released.
<b>Order Lines Being Delivered</b>	
Allow Modification of Fulfillment Options for Delivery Lines after Release	Check this box to allow modification of fulfillment options for delivery lines that are released.
Allow Cancellation of Delivery Lines after Release	Check this box to allow cancellation of delivery lines that are released.


5. Click  to save your changes.

---

## Configure Information Recorded During Level of Service Selection

You can configure to enable users to record committed dates when the user selects the level of service.


To enable users to record committed dates:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Information Recorded During Level of Service Selection. The following table describes the field in the Configure Information Recorded During Level of Service Selection window.

---

Field	Description
Save committed dates on the line	Check this box to use the committed date for the order.

---


4. Click  to save your changes.

---

## Configure Line Relationship Type

As an advanced configuration, you can define the line relationship types for an item. In the Sterling Selling and Fulfillment Foundation, ensure that you select the Consider For Sorting box available in the Line Relationship Type Details window. For more information about defining a line relationship type, see the *Sterling Distributed Order Management: Configuration Guide*.

To configure line relationship type:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Line Relationship Type.


For more information about configuring a document's instruction types, see the *Sterling Distributed Order Management: Configuration Guide*.



---


## Configure FTC Compliance

You can tailor the FTC Compliance feature to meet the demands of your customized business processes.

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure FTC Compliance Settings.
4. Enter information in the applicable fields. The following table describes the fields in the FTC Compliance window.

---

Field	Description
Default First Promise Date (days)	Enter the number of days after the order date that the first promise date will be set to, if no promise date has been given to the customer. This value must be a positive integer that is less than 30.
Default Cancel Date (days)	Enter the number of days after first promise date to set the cancel date to, when a delay is found. This delay can be more than 30 days or an indefinite delay. The cancel date is the date when the order will be automatically cancelled if the customer does not respond. This value must be a positive integer that is less than 5.
Process Buffer Time (hours)	Enter the number of hours by which to extend the promise date in order to consider process constraints, such as small carrier or warehouse processing delays that cannot be taken into account in advance. If a shipment is delayed within this configured value of hours, no notification will be sent. If, at any time, the delay becomes greater than this configured value, a notification will be sent. This value must be less than 72 hours.
Cancel Reason Code	Enter the cancellation reason code that will be used when a line is cancelled in order to comply with FTC regulations.


5. Click  to save your changes.

---

## Configure Price Match Statuses


You can configure the list of statuses allowed for price match.

To configure price match status:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Price Match Statuses.
4. Enter information in the applicable fields.

The following table describes the fields in the Price Match Status Details window.

Fields	Description
Price Match Status	Indicates the status for the price match.
Short Description	Enter a short description of the price match status.
Long Description	Enter a more detailed description of the price match status.

5. Click  to save your changes.


**Note:** The statuses available for a price match record are APPROVED, REJECTED and PENDING. You cannot add a new status for a price match record.

---

## Configure Competitor Statuses


You can configure the list of statuses allowed for a competitor.

To configure competitor status:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Competitor Statuses.
4. Enter information in the applicable fields.

The following table describes the fields in the Competitor Status Details window.

Fields	Description
Competitor Status	Indicates the status of the competitor.
Short Description	Enter a short description of the competitor status.
Long Description	Enter a more detailed description of the competitor status.

5. Click  to save your changes.


**Note:** The statuses available for a competitor record are APPROVED, REJECTED and PENDING. You cannot add a new status for a competitor record.

---

## Configure Bundle Components Display


You can configure if the bundle components need to be displayed on the Order Summary, Return Summary, and Shipment Summary screens, and the Order Pricing Summary pop-up window.

To configure the display of bundle components:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Bundle Components Display.
4. Enter information in the applicable fields. The following table describes the field in the Bundle Component Display window.

---


Field	Description
Display Component Items For Bundles In Summary Screens	Select this check box to display bundle components on the Order Summary, Return Summary, and Shipment Summary screens, and the Order Pricing Summary pop-up window. By default, this option is unchecked for all enterprises.

5. Click  to save your changes.


---

## Configure External User Interface Rules

You can configure the default URL that should be used within the application user interface.

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure External User Interface URL.
4. Enter the external user interface URL that should be used.

**Note:** Ensure that the IP address that you enter is same as the BaseURL that is specified in the locationsycfg file. For more information about launching the Application Console from within the Sterling Call Center and Sterling Store applications, see the *Sterling Call Center and Sterling Store: Deployment Guide*.



5. Click  to save your changes.

---

## Configure Display of Fulfillment Summary Screen

You can configure the type of fulfillment summary screen that should be displayed.

To configure the display of fulfillment summary screen:


1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Display of Fulfillment Summary Screen.
4. Select one of the following options:
  - ◆ Display Basic Fulfillment Summary Screen (Recommended for B2C Orders) to display the Basic Fulfillment Summary screen.
  - ◆ Display Advanced Fulfillment Summary Screen (Recommended for B2B Orders) to display the Advanced Fulfillment Summary screen.
5. From the Scheduling Rule For Additional Shipping Option drop-down list, select the default scheduling rule to be used to display an additional shipping option in the Advanced Fulfillment Summary screen.
6. Click .

---

## Configure Order Tags for Sales Orders

As an advanced configuration, you can configure order tags for sales orders. Order tags are used to determine the compatibility of an order with different versions of the Sterling Call Center and Sterling Store application.

To configure the order tags for sales orders:

1. In the Channel Applications Manager, click  icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Order Tags for Sales Orders.



For more information about configuring order tags, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Quote Entry Rules

This configuration allows you to define the customer search options and the associated item relationships used for a quote entry.

To configure the quote entry rules:

1. In the Channel Applications Manager, click the  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Select **Configure Quote Entry Rules**.  
The Define Quote Entry Rules screen is displayed.
3. The **Enable Customer Type Search** check box is selected by default in the Customer Search Rules panel. When searching the customer master database, you can configure the customer type during the search as follows:
  - ◆ Select the **Consumer** option to allow the user to search for the consumer customer type during the search.
  - ◆ Select the **Business** option to allow the user to search for the business customer type during the search.
4. To configure the item association rules and relationship types:
  - ◆ Select the **Show in UI** check box to display the corresponding product items in the Related Items dialog box.
  - ◆ From the **Relationship Type** drop-down list, select the relationship type to be used when adding product items as related items.
5. Click  to save your changes.

For more information about defining relationship types, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.



---

## Define Quote Hold Types

A quote can be put on hold for multiple reasons. In this configuration, you define various types of holds that can be associated with a quote. You also configure the behavior of other system functions when the quote is on hold. For more information about defining hold types, see the *Sterling Distributed Order Management: Configuration Guide*.


When a new hold type is defined, an exception type with the same name as the hold type must be created. As a result of this, links to the associated alerts that have been raised when an order goes on hold if there are any associated alerts for that event are displayed in the Remove Hold screen.

---

## Configure Quote Modification Rules

This configuration enables you to control the type of modifications that are allowed on a quote or quoteline when it is in a given status.

To configure quote modification rules:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Select **Configure Quote Modification Rules**.


For more information about defining modification rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Quote Abandonment Reasons

This configuration provides a list of reason codes that are available during the quote abandonment process.

To define a quote abandonment reason:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Select **Define Quote Abandonment Reasons**.  
The Cancellation Reasons screen is displayed.


For more information about quote abandonment reasons, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Quote Approval Plans

This configuration allows you to define the approval plan used to order how the approval process will flow.

To configure the quote approval plans:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Select **Configure Quote Approval Plans**.


For more information about configuring quote approval plans, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Quote Approval Rule Violation Reasons

This configuration allows you to define the approval rule violation reasons that can be used when defining approval plans.

To configure the quote approval rule violation reasons:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Select **Configure Quote Approval Violation Reasons**.


For more information about configuring quote approval rule violation reasons, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Quote Note Types and Configuring Automatic Note Logging

This configuration allows you to define the note types that can be logged against a quote. Also, you can define which events will automatically log a note against an quote, and the service to be used for logging notes.


To define quote note types and configure automatic note logging:

1. In the Channel Applications Manager, click the  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Define Quote Note Types and Configure Automatic Note Logging**.

The Quote Audit Notes screen containing the current configuration choices for the quote notes is displayed.

4. To change the current or default quote entry configuration, click **Change Configuration**.


The Quote Audit Note Wizard is displayed. The wizard displays information in two panels: the left panel displays the existing note reasons, and the right panel displays a summary of all of the note reasons you have configured.

5. To add a note reason type:
  - a. Click .
  - b. Enter information in the applicable fields. The following table describes the fields in the Note Reason Details dialog box.

---

Field	Description
Note Reason	Enter a name for the note reason.
Short Description	Enter a short description for the note reason.
Long Description	Enter a more detailed description for the note reason.

---

- c. Click  to save your changes.

After configuring the note reason type, you can choose when you want the notes to be automatically logged.

6. Click **Next**.
7. In the **Create Quote** panel, perform the following steps:
  - a. Select **A quote is created** check box for a note to be automatically logged when a quote is created.
  - b. Select the **Note Type** from the drop-down list.
  - c. Enter the **XSL Translation File** to be used.

8. In the **Convert Quote To Order** panel, perform the following steps:
  - a. Select **A quote is converted to order** check box for a note to be automatically logged when a quote is converted to an order.
  - b. Select the **Note Type** from the drop-down list.
  - c. Enter the **XSL Translation File** to be used.
9. Click **Next**.
10. In the **Quote Presented To Customer** panel, perform the following steps:
  - a. Select **A quote is presented to customer** check box for a note to be automatically logged when the related quote is presented to a customer.
  - b. Select the **Note Type** from the drop-down list.
  - c. Enter the **XSL Translation File** to be used.
11. In the **Quote Sent For Approval** panel, perform the following steps:
  - a. Select **A quote is sent for approval** check box for a note to be automatically logged when the related quote is sent to the customer for approval.
  - b. Select the **Note Type** from the drop-down list.
  - c. Enter the **XSL Translation File** to be used.
12. Click **Next**.
13. From the **Service to Execute** drop-down list, select a service that will be executed when a note is logged against a quote.
14. Click **Finish** to close the Quote Audit Notes Wizard and save your settings.

**Note:** After you select a note type from the **Note Type** drop-down list for an event and save the configuration, the note type is still displayed in the **Note Type** drop-down list even after you delete the note type. In such a scenario, you must manually change the configuration and ensure that the deleted note type is not selected for the event. For example, let us suppose that you select the **SentToCustomer** note type to be used to log notes on a quote when the quote is presented to a customer, and save the configuration. In this example, if you delete the **SentToCustomer** note type in the Quote Audit Note Wizard, this note type is still displayed in the **Note Type** drop-down list in the **Quote Presented To Customer** panel.

---

## Configure Proposal Templates


This configuration enables you to add, modify, or delete proposal templates which are used by enterprises to generate quote proposals.

You can perform the following tasks:

- ◆ [Add a Proposal Template](#)
- ◆ [Modify a Proposal Template](#)
- ◆ [Delete a Proposal Template](#)

### Add a Proposal Template

To add a proposal template:

1. In the Channel Applications Manager, click the  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Proposal Templates**.

The Configure Proposal Templates screen is displayed. This screen displays the **Template Name** and the **Template Description** of all the proposal templates that have been configured.


4. Click .

The Proposal Template Details dialog box is displayed.

5. Enter information in the applicable fields. The following table describes the fields in the Proposal Template Details dialog box.


---

Field	Description
Proposal Template	Enter a name for the proposal template. This is the name that is displayed in Sterling Field Sales. This name should contain the service name that is used to generate the corresponding proposal template.
Short Description	Enter a short description for the proposal template. The text entered in this field is displayed on the user interface.
Long Description	Enter a more detailed description for the proposal template.



6. Click  to save your changes.

### Modify a Proposal Template

To modify a proposal template:



1. In the Channel Applications Manager, click the  icon adjacent to **Configure Quote Administration** to expand the branch.



2. Click the Advanced Configurations link.
3. Select **Configure Proposal Templates**.  
The Configure Proposal Templates screen is displayed. This screen displays the Template Name and the Template Description of all the proposal templates that have been configured.
4. Select the proposal template you want to modify.
5. Click . Alternatively, right-click and select **Details**.  
The Proposal Template Details dialog box is displayed.
6. Enter the information in the applicable fields.  
**Note:** The **Proposal Template** name cannot be modified.
7. Click  to save your changes.

## Delete a Proposal Template

To delete a proposal template:

1. In the Channel Applications Manager, click the  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Proposal Templates**.  
The Configure Proposal Templates screen is displayed. This screen displays the Template Name and the Template Description of all the proposal templates that have been configured.
4. Select the proposal template you want to delete.
5. Click . Alternatively, right-click and select **Delete**.
6. The Confirmation dialog box with the message *Are you sure you want to delete this record?* is displayed. Click **Yes**.  
The proposal template is deleted.

---

## Configure Proposal Formats

This configuration enables you to add, modify, or delete proposal formats that are used by enterprises to generate quote proposals. The following print formats are supported:


- ◆ Portable Document Format
- ◆ Rich Text Format

You can perform the following tasks:


- ◆ [Add a Proposal Format](#)
- ◆ [Modify a Proposal Format](#)
- ◆ [Delete a Proposal Format](#)

### Add a Proposal Format


To add a proposal format:

1. In the Channel Applications Manager, click the  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Proposal Formats**.

The Configure Print Formats screen is displayed. This screen displays the **Format Type** and the **Format Description** of all the print formats that have been configured.




4. Click .  
The Format Type Details dialog box is displayed.
5. Enter information in the applicable fields. The following table describes the fields in the Format Type Details dialog box.

Field	Description
Format Type	Enter a name for the format type. This is the name that is displayed in Sterling Field Sales. This name should contain the service name that is used to generate the corresponding print format.
Short Description	Enter a short description for the print format. The text entered in this field is displayed on the user interface.
Long Description	Enter a more detailed description for the print format.

6. Click  to save your changes.



## Modify a Proposal Format

To modify a proposal format:

1. In the Channel Applications Manager, click the  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Proposal Formats**.  
The Configure Print Formats screen is displayed. This screen displays the **Format Type** and the **Format Description** of all the print formats that have been configured.
4. Select the print format you want to modify.
5. Click . Alternatively, right-click and select **Details**.  
The Format Type Details dialog box is displayed.
6. Enter the information in the applicable fields.  
**Note:** The **Format Type** name cannot be modified.
7. Click  to save your changes.

## Delete a Proposal Format

To delete a proposal format:


1. In the Channel Applications Manager, click the  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Proposal Formats**.  
The Configure Print Formats screen is displayed. This screen displays the **Format Type** and the **Format Description** of all the print formats that have been configured.
4. Select the print format you want to delete.
5. Click . Alternatively, right-click and select **Delete**.
6. The Confirmation dialog box with the message *Are you sure you want to delete this record?* is displayed. Click **Yes**.  
The proposal format is deleted.

---

## Define Quote Types and Line Types

As an advanced configuration, you can define quote types and line types. Quotes and quote lines can be categorized into multiple types such as urgent, high priority, or normal. This configuration enables you to define the valid list of quote types, line types, and other codes that help in this categorization.

To define quote types and line types:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Define Quote Types and Line Types**.


For more information about defining quote types and line types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Quote Validations Required

You can control the levels of validation required for a quote.

To configure the required quote validations:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Quote Validations Required**.


For more information about configuring a document's quote validation, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Quote Instruction Types

This configuration enables you to provide a master list of instruction types. When capturing an instruction, each instruction is associated with a particular type. This groups instructions into multiple categories such as PACK, SHIP, and GIFT.

To define the quote instruction types:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Define Quote Instruction Types**.


For more information about configuring a document's instruction types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Custom Quote Modification Types

The system categorizes all quote modifications into a "modification type". All rules for controlling modifications are associated with these modification types. This configuration enables you to create your own custom modification types that can be used for controlling modifications of specific quote attributes, including extended quote attributes.

To define custom quote modification types:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Select **Define Custom Quote Modification Types**.

For more information about defining custom quote modification types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure which Modifications Trigger Re-pricing

As an advanced configuration, you can identify modification types that must trigger quote re-pricing.

To configure the modifications that trigger quote re-pricing:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure which Modifications Trigger Re-pricing**.

For more information about configuring modifications that trigger quote re-pricing, see the *Sterling Distributed Order Management: Configuration Guide*.



---

## Define Charge Categories and Names

This configuration enables you to define various charge categories and names associated for a quote.

To configure basic rules for payment handling:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Define Charge Categories and Names**.


For more information about defining charge definitions, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Payment Terms

As an advanced configuration, you can define the payment terms that can be used with quotes.

To configure the payment terms:

1. In the Channel Applications Manager, click  icon adjacent to Configure Quote Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Payment Terms.


For more information about configuring the payment terms, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Financial Rules

This configuration allows you to define what date is used for pricing, if charge names need to be validated, and what the charge name used for shipping is.

To configure the financial rules:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Financial Rules**.


For more information about configuring financial rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Line Relationship Type

Relationship types provide a mechanism to establish a relationship between the quote lines on a quote.

To configure a line relationship type:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Line Relationship Type**.


For more information about configuring line relationship types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Order Tags for Quotes

This configuration enables you to define the order tags to be applied to a quote when certain criteria are met. For example, you can define a tag to be applied to a quote when a certain modification is performed on the quote.

To configure the order tags for quotes:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Order Tags for Quotes**.


For more information about configuring order tags for quotes, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Transaction Specific Rules

As an advanced configuration, you can configure transaction specific rules. This is a miscellaneous set of rules that are associated to specific business transaction.

To configure transaction specific rules:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Transaction Specific Rules**.


For more information about configuring transaction specific rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Quote Expiration and Recommended Item Rules

This configuration allows you to define the expiration policy and the line type to use for "Recommended Items" on a quote.

To configure the quote expiration and recommended item rules:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Quote Administration** to expand the branch.
2. Click the Advanced Configurations link.
3. Select **Configure Quote Expiration and Recommended Item Rules**.


For more information about configuring the quote expiration and recommended item rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Opportunity Note Reasons

This configuration allows you to define note reasons for quote.

To define opportunity note reasons:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Opportunity Administration** to expand the branch.
2. Select **Define Opportunity Note Reasons**.

For more information about defining opportunity note reasons, see the *Sterling Distributed Order Management: Configuration Guide*.




---

## Define Opportunity Lead Origins

This configuration allows you to define a set of ways that an opportunity originated in.

To define opportunity lead origins:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Opportunity Administration** to expand the branch.
2. Select **Define Opportunity Lead Origins**.

For more information about defining opportunity lead origins, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Opportunity Lost Reasons

This configuration allows you to define a set of reasons why an opportunity was lost.

To define opportunity lost reasons:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Opportunity Administration** to expand the branch.
2. Select **Define Opportunity Lost Reasons**.


For more information about defining opportunity lost reasons, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Store Pick Up Rules

This configuration enables you to select the default settings when searching for alternate stores to fulfill an order.


To configure store pick up rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Store Pick Up Administration to expand the branch.
2. Select Configure Store Pick Up Rules.
3. Select the appropriate options for the store pick up rules. The following table describes the fields in the Store Pick Up Rules window.

Field	Description
Allow Pick Up	Select this box to allow users to see store pick up options.
Distance Radius to Consider When Finding Nearby Stores	Enter a number to determine the radius to consider when finding nearby stores.
Distance Radius to Consider When Finding More Stores	Enter a number to determine the radius to consider when finding more stores.
Distance UOM	Select from the drop-down list the unit of measurement to use when defining the distance radius.
Standard Search Fulfillment Type	Select the standard search fulfillment type from the drop-down list. When this option is selected, the application will use this fulfillment type when searching for item availability in the Alternate Stores Search screen. This fulfillment type is used in a sourcing rule that determines the correct set of nodes to consider. For example, you may specify a fulfillment type that corresponds to a sourcing rule representing all nodes of the type 'store'. This ensures that all store nodes are considered when searching for alternate stores.
Extended Search Fulfillment Type	Select the extended search fulfillment type from the drop-down list. When this option is selected, the application will use this fulfillment type when performing an extended stores search in the Alternate Store Search screen. This fulfillment type is used in a sourcing rule that determines the correct set of nodes to consider for an extended store search. For example, you may specify a fulfillment type that corresponds to a sourcing rule representing all nodes of type 'store', including distribution centers that allow customer pick up.
Display Available Quantity On Alternate Stores Popup	Select this check box to view the available quantity in the Display Near-By Stores pop-up window of the Sterling Call Center and Sterling Store applications.

---

Field	Description
Display Nearby Store Availability Panel In Store Mode	<p>Select one of the following options:</p> <ul style="list-style-type: none"><li>◆ Display Nearby Stores Availability Panels In Store Mode on Item Details Page. If you select this option, in the Sterling Store application, the item available quantity for the selected country and postal code is displayed.</li><li>◆ Do Not Display Nearby Stores Availability Panels In Store Mode on Item Details Page. If you select this option, in the Availability panel of the Sterling Store application, the View Nearby Stores For Availability link is displayed.</li></ul> <p>For more information about viewing product item details, see the <i>Sterling Call Center and Sterling Store: User Guide</i>.</p>


4. Click  to save your changes.

---


## Configure Verification Criteria

This configuration enables you to specify the customer verification criteria in the Customer Pick task.

To configure verification criteria:

1. In the Channel Applications Manager, click  icon adjacent to Configure Store Pick Up Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Verification Criteria.
4. Enter information in the applicable fields. The following table describes the fields in the Customer Verification Type Details table.

Field	Description
Customer Verification Type	Indicates the customer verification type.
Short Description	Enter a short description of the customer verification type. This literal will be displayed on the customer pick and backroom pick screens. If you want mnemonics to appear for these literals when displayed on the screen, prefix the character which should appear as a mnemonic with the "&".
Long Description	Enter a more detailed description of the customer verification type.


5. Click  to save your changes.

---

## Configure the IBM Sterling Web Cart Rules

The Channel Applications Manager provides a Sterling Web Cart Rules wizard that enables you configure the behavior of carts in the Sterling Web application.

To access the Sterling Web Cart Rules wizard:

1. In the Channel Applications Manager, click the  icon adjacent to Configure Sterling Web Application.

The list of rules that can be configured are displayed.

2. Click Configure Sterling Web Cart Rules.

The Sterling Web Cart Rules screen displays either the default configuration settings if you are configuring the Sterling Web Cart Rules for the first time, or the last saved configuration settings if you have configured the Sterling Web Cart Rules previously.

3. To change the default Sterling Web Cart configuration, click Change Configuration.

As you proceed with the configuration, the wizard displays information in two panels:

- ◆ The left panel displays the configuration rules that you can configure.
- ◆ The right panel displays a summary of all the configuration rules that you have configured so far.

4. Select the Check Inventory When Creating or Viewing Cart check box to enable inventory checks on items when a Sterling Web user is either creating or viewing a cart.

Select the Verify Real-Time Inventory When Cached Inventory Is Low check box to enable real-time inventory checks on items when the cached inventory is low.

5. Click Next.

You are prompted to configure the item association types to be displayed in the Order Entry screen of the Sterling Web application.

6. To configure the item association rules and relationship types:

- ◆ Select the Show In UI check box of the corresponding association type to enable the display of product items for that association type in the Item Details screen of the Sterling Web application.

**Note:** In Sterling Web, Release 1.0, only the cross-sell and up-sell associations are considered.

- ◆ In the Max # To Show column, enter the maximum number of items, which correspond to the association type, to be displayed in the Item Details screen of the Sterling Web application.
- ◆ In the Function column, select one of the following options from the drop-down list corresponding to the association type:
  - Relate Item: In the Sterling Web Add Items screen, if a user selects an item for the association type, the item will be added as an associated item of the original item in the order.
  - Replace Item: In the Sterling Web Add Items screen, if a user selects an item for the association type, the original item will be replaced with the associated item.



- ◆ In the Relationship Type column, select a relationship type from the drop-down list corresponding to the association type. The relationship type will be used when adding product items as related items.
7. Click Next.  
You are prompted to configure the Sterling Web application to enable customers to add coupons to a cart.
  8. Select the Enable Coupon Entry check box to enable customers to add coupons to an order cart.
  9. Click Next.  
You are prompted to configure the validation rules for the configurable items.
  10. Select the Validate Configurable Items During Checkout check box to validate the configurable items when a customer checks out of the order cart.  
Select the Validate Configurable Items When Viewing Cart check box to validate the configurable items when a customer views the order cart.
  11. Click Next.  
You are prompted to select a default carrier service for the new orders.
  12. Select a carrier service from the Default Carrier Service For Draft Order Lines drop-down list.
  13. Click Finish to close the Sterling Web Cart Rules wizard and save your changes.

---

## Configure IBM Sterling Web User Rules

This configuration enables you to configure the user preferences within the Sterling Web application. You can also configure the application to remember the login credentials of a Sterling Web user when that user logs in to the application.

To configure the Sterling Web User Rules:

1. In the Channel Applications Manager, click the  icon adjacent to Configure Sterling Web Application.  
The list of rules that can be configured are displayed.
2. Click Configure Sterling Web User Rules.
3. Select the Allow Users To Select The "Remember Me" Option During Login check box to display the Remember Me check box in the Sterling Web application Home page.
4. Select the Allow Users To Change Their Preferences check box to enable users to personalize the appearance of the Sterling Web application.
5. Click  to save your changes.





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## Configure IBM Sterling Web Categories Display Rules

This configuration enables you to configure the number of categories to be displayed in the Sterling Web application Home page.

To configure the Sterling Web Categories Display Rules:


1. In the Channel Applications Manager, click the  icon adjacent Configure Sterling Web Application. The list of rules that can be configured are displayed.
2. Click Configure Sterling Web Categories Display Rules.
3. In the No. Of Categories To Be Displayed In The Sterling Web Navigation Bar field, enter the number of categories to be displayed in the Sterling Web application Home page.
4. Click  to save your changes.

---

## Configure IBM Sterling Web Store Display Rules

This configuration enables you to configure the number of stores to be displayed for each item, and the store radius in the Sterling Web application.


To configure the Sterling Web Store Display Rules:


1. In the Channel Applications Manager, click the  icon adjacent to Configure Sterling Web Application.

The list of rules that can be configured are displayed.

2. Click Configure Sterling Web Store Display Rules.
3. Enter information in the applicable fields. The following table describes the fields in the Sterling Web Store Display Rules window.

---

Field	Description
Enable Store Pick Up	Select the Enable Store Pick Up check box to enable Sterling Web users to view the store pick up options in the Sterling Web application. <b>Note:</b> If the Enable Store Pick Up check box is not selected, all the rules listed in this table will be disabled.
Distance User Can Enter	Select the check box against the corresponding distance. This distance will be considered as the approximate distance between a store and a user's shipping address.  You can also create new distances. Click  to create a new distance.
Distance UOM To Consider When User Searches For Stores	Select a unit of measurement for the distance.
Maximum Number Of Stores To Be Displayed	Enter the maximum number of stores to be displayed for each item in the Sterling Web application.
Enable Store Pick Up For Future Date	Select this check box to enable the Sterling Web users to pick up items at a date later than the one specified.


4. Click  to save your changes.

---

## Define Carriers

You can define carriers that control logistics for your business. To define a carrier, you have to choose Carrier as the role for an organization and configure the carrier attributes.

To define a carrier:

1. In the Channel Applications Manager, click  icon adjacent to Configure Outbound Logistics to expand the branch.
2. Select Define Carriers.

For more information about assigning the organization's roles and participant associations, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.


For more information about defining carrier attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Carrier Services

You can set up codes to identify different carrier services a carrier uses to ship orders.

To define a carrier service:

1. In the Channel Applications Manager, click  icon adjacent to Configure Outbound Logistics to expand the branch.
2. Select Define Carrier Services.


For more information about configuring cross application carrier services, see the *Sterling Logistics Management: Configuration Guide*.

---

## Define Types of Routing Guide Classifications

You can configure product-level control parameters for setting up routing rules. You can choose which product classifications to use for the purpose of routing guides.

To define the types of routing guide classifications:

1. In the Channel Applications Manager, click  icon adjacent to Configure Outbound Logistics to expand the branch.
2. Select Define Types of Routing Guide Classifications.


For more information about defining classification definitions, see the *Catalog Management: Configuration Guide*.

---

## Configure Outbound Constraints

You can configure outbound constraints that describe conditions that control how shipping is done. These include whether certain items can be shipped together, whether to use Economic Shipping Parameters, and how routing is performed.

To configure outbound constraints:

1. In the Channel Applications Manager, click  icon adjacent to Configure Outbound Logistics to expand the branch.
2. Select Configure Outbound Constraints.


For more information about defining outbound constraints, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Shipment Modes

You can define shipment modes to indicate how an order is being shipped.

To define a shipment mode:

1. In the Channel Applications Manager, click  icon adjacent to Configure Outbound Logistics to expand the branch.
2. Select Define Shipment Modes.


For more information about defining shipment modes, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Outbound Shipment Modification Rules

You can configure the types of modifications allowed on a shipment or shipment line when it is in a given status.

To configure the outbound shipment modification rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Outbound Logistics to expand the branch.
2. Select Configure Outbound Shipment Modification rules.

For more information about configuring outbound shipment modification rules, see the *Sterling Logistics Management: Configuration Guide*.



---

## Configure Order Fulfillment Process

You can configure transactions, statuses, pipelines, and services associated with the order fulfillment process. For more information about defining process type pipelines, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

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## Configure Shipping Process

You can configure transactions, statuses, pipelines, and services associated with the shipping process for an order. For more information about configuring an order document's shipment-specific components, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Delivery and Installation Process

You can configure transactions, statuses, pipelines, and services associated with the delivery and installation process for an order. For more information about defining a value-added services process model, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Return Fulfillment Process


You can configure transactions, statuses, pipelines, and services associated with the return fulfillment process. For more information about defining process type details, see the *Sterling Reverse Logistics: Configuration Guide*.

---

## Configure Quote Fulfillment Process

This process represents an overall fulfillment process for a quote. You can configure transactions, statuses, pipelines, and services associated with the fulfillment process through this configuration.

To configure the quote fulfillment process:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Business Process Models and Monitoring Rules** to expand the branch.
2. Select **Configure Quote Fulfillment Process**.


For more information about configuring the quote fulfillment process, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Opportunity Fulfillment Process

This process represents an overall fulfillment process for an opportunity. You can configure transactions, statuses, pipelines, and services associated with the fulfillment process through this configuration.

To configure the opportunity fulfillment process:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Business Process Models and Monitoring Rules** to expand the branch.
2. Select **Configure Opportunity Fulfillment Process**.

For more information about configuring the opportunity fulfillment process, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Receipt Process

You can configure transactions, statuses, pipelines, and services associated with the receipt process. For more information about defining process type details, see the *Sterling Reverse Logistics: Configuration Guide*.

---

## Define Order Milestones

You can define milestones for the fulfillment process of a sales order. For more information about defining milestones, see the *Sterling Distributed Order Management: Configuration Guide*.



---

## Define Order Monitoring Events

You can define your own monitoring events for the fulfillment process of a sales order. You can also control which event to raise when an alert is detected by the order monitor. For more information about defining monitoring events, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Milestones for Returns

You can define milestones for the fulfillment process of a return order. For more information about defining milestones, see the *Sterling Reverse Logistics: Configuration Guide*.

---

## Define Monitoring Events for Returns


You can define monitoring events for the fulfillment process of a return order. You can also control which event to raise when an alert is detected by the return order monitor. For more information about defining monitoring events, see the *Sterling Reverse Logistics: Configuration Guide*.

---

## Define Quote Milestones

The application presents a powerful concept of milestones for a quote. You can define required milestones for a quote through this configuration. These milestones can be used to define monitoring rules that can pro-actively alert you when you are in danger of missing a milestone.

To define the quote milestones:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Business Process Models and Monitoring Rules** to expand the branch.
2. Select **Defined Quote Milestones**.


For more information about defining the quote milestones, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Define Monitoring Events for Quotes

This configuration enables you to define your own events and how those events are handled. These events can then be associated with quote monitoring rules and you can control which event is raised when an alert situation is detected by the monitor.

To define the monitoring events for quotes:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Business Process Models and Monitoring Rules** to expand the branch.
2. Select **Define Monitoring Events for Quotes**.

For more information about defining the monitoring events for quotes, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Transactions and Events for Inventory, Item, and UI

As an advanced configuration, you can configure transactions, events, and services associated to miscellaneous processes, including inventory, item, and UI related processes. For more information about defining transactions, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Document Types and Process Types


As an advanced configuration, you can configure document types and their corresponding process types. You can create new document types, document template definitions, item validation rules, and document type parameters. For more information about configuring process models, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Inventory Related Rules

You can configure rules associated with inventory availability, monitoring, and costing.

To configure the inventory related rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Inventory Synchronization to expand the branch.
2. Select Configure Inventory Related Rules.

For more information about configuring inventory rules, see the *Sterling Global Inventory Visibility: Configuration Guide*.




---

## Configure Supply and Demand Types

As an advanced configuration, you can define various supply and demand types.

To configure the supply and demand types:

1. In the Channel Applications Manager, click  icon adjacent to Configure Inventory Synchronization to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Supply and Demand Types.


For more information about defining supply types, demand types, and considerations, see the *Sterling Global Inventory Visibility: Configuration Guide*.

---

## Configure Availability Safety Factors

As an advanced configuration, you can specify safety factors to apply to each supply type when using them for answering availability questions.

To configure the safety factors:

1. In the Channel Applications Manager, click  icon adjacent to Configure Inventory Synchronization to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Availability Safety Factors.


For more information about the inventory availability safety factor, see the *Sterling Global Inventory Visibility: Configuration Guide*.

---

## Configure how Supply and Demand are Changed with Order Status

As an advanced configuration, you can control the movement of quantity in different supply and demand types as an order progresses through its life-cycle. The status inventory types are used to associate statuses with specific supply and demand types according to the organization.

To configure how supply and demand are changed with the order status:

1. In the Channel Applications Manager, click  icon adjacent to Configure Inventory Synchronization to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure How Supply and Demand are Changed with Order Status.


For more information about defining status inventory types, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Inventory Node Type Rules

As an advanced configuration, you can configure inventory node type rules. These rules allow for the configuration of inventory level node type rules to determine whether to apply on-hand and future safety factors to inventory.

To configure inventory node type rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Inventory Synchronization to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Inventory Node Type Rules.


For more information about configuring inventory node type rules, see the *Sterling Global Inventory Visibility: Configuration Guide*.

---

## Configure Return Order Modification Rules

You can configure the modification rules for a return order to allow users to perform modifications on a return order that is in a particular status.

To configure the return order modification rules:

1. In the Channel Applications Manager, click  icon adjacent to Configure Return Administration to expand the branch.
2. Select Configure Return Order Modification Rules.

For more information about defining modification rules, see the *Sterling Reverse Logistics: Configuration Guide*.

---


## Define Return Reasons

This configuration provides a list of reason codes that are available during the return process.

To define return reasons:

1. From the Channel Applications Manager, select Configure Return Administration.
2. Under Configure Return Administration, select Define Return Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Return Reasons Details table.

Field	Description
Return Reasons	Enter a name for the return reason.
Short Description	Enter a short description of the return reason.
Long Description	Enter a more detailed description of the return reason.
RE-price Sales Order	Check this to reprice the sales order with the reduced qty.


4. Click  to save your changes.

---


## Define Charge Override Reasons

This configuration provides a list of reason codes that are available for charge override.

To configure charge override reasons:

1. In the Channel Applications Manager, click  icon adjacent to Configure Return Administration to expand the branch.
2. Select Define Charge Override Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Charge Override Reason Details window.

Fields	Description
Charge Override Reasons	Enter a name for the charge override reason.
Short Description	Enter a short description of the charge override reason.
Long Description	Enter a more detailed description of the charge override reason.

4. Click  to save your changes.

---


## Define Receiving Disposition Codes

This configuration provides a list of receiving disposition codes that are available during the return process.

To configure receiving disposition codes:

1. From the Channel Applications Manager, select Configure Return Administration.
2. Under Configure Return Administration, select Define Return Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Disposition Details window.

Field	Description
Receiving Disposition	Enter a name for the receiving disposition.
Short Description	Enter a short description of the receiving disposition.
Product Class	Select a product class for the receiving disposition.
Damaged	Check this box to indicate that the disposition is for damaged items.
Final Disposition	Check this box to indicate that the disposition is a final disposition.

4. Click  to save your changes.



---


## Configure Rules for Wrongly Shipped Items

This configuration enables you to define reship reasons for wrongly shipped items and whether a customer can return unknown items that were wrongly shipped.

To configure rules for wrongly shipped items:

1. From the Channel Applications Manager, select Configure Return Administration.
2. Under Configure Return Administration, select Configure Rules for Wrongly Shipped Items.
3. Enter information in the applicable fields. The following table describes the fields in the Configure Rules For Wrongly Shipped Items window.

Field	Description
Drop-down list for Default Reship Reason for Wrongly Shipped Items	Select among the reship reasons displayed in the drop-down list. For more information, see <a href="#">Define Reship Reasons</a> .
Check box for Allow Creation of Return for Unknown Items	Select this check box to enable a CSR to return unknown items.
Use Item field	Enter the temporary item ID that will be used to identify unknown items until these items can be identified during receiving.

4. Click  to save your changes.

---

## Configure Return Entry Rules

This configuration provides a list of return entry rules that are available during the return process.


To configure return entry rules:

1. From the Channel Applications Manager, select Configure Return Administration.
2. Under Configure Return Administration, select Configure Return Entry Rules.
3. Select the applicable fields or check boxes. The following table describes the fields in the Return Entry Rules window.

---

Field	Description
Override Return Policy Note Type	The note type used when overriding the return policy. The default is Return Policy Overridden, which, when enabled, allows users to override the return policy. For more information about configuring return note reasons, see <a href="#">Define Return Note Reasons</a> .
Default Exchange Type	This specifies what your enterprise defaults to as the exchange type: REGULAR, ADVANCED, or PREPAID. The default exchange type for the enterprise is REGULAR.
Allow End Users to Modify the Exchange Type on an Exchange Order	Enables users to access and change the Exchange Type.
Display Reshipped Items During Return Entry by Default	When this check box is selected, reshipped lines are displayed when the screen loads.
Allow Return of Items without an Order	Enables customers to return items without an order. When this check box is selected, the Items without an order tab is displayed on the line selection screen.

---

4. Click  to save your changes.

---

## Define Return Note Reasons

This configuration provides a list of note reasons that are available during the return process.


To define return notes reasons:

1. From the Channel Applications Manager, select Configure Return Administration.
2. Under Configure Return Administration, select Define Return Note Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Note Reason Details window.

---

Field	Description
Note Reason	Enter a name for the note reason.
Short Description	Enter a short description of the note reason
Long Description	Enter a more detailed description of the note reason.

---

4. Click  to save your changes.

---

## Define Return Cancellation Reasons

This configuration provides a list of cancellation reasons that are available during the return process.


To configure return cancellation reasons:

1. From the Channel Applications Manager, select Configure Return Administration.
2. Under Configure Return Administration, select Define Return Cancellation Reasons.
3. Enter information in the applicable fields. The following table describes the fields in the Cancellation Reason Details window.

---

Field	Description
Cancellation Reason	Enter a name for the cancellation reason.
Short Description	Enter a short description of the cancellation reason
Long Description	Enter a more detailed description of the cancellation reason.

---

4. Click  to save your changes.

---

## Define Return Types and Return Line Types

As an advanced configuration, you can define return types and return line types. Return orders and lines can be categorized into multiple types such as exchange and credit. This configuration allows you to define a valid list of return types, line types, and other codes that help in this categorization. For more information about configuring a document's attributes, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Return Receipt Handling

As an advanced configuration, you can define rules to determine how return receipts must be handled. For more information about defining receipt preferences, see the *Sterling Reverse Logistics: Configuration Guide*.

---

## Define Charge Categories and Names

As an advanced configuration, you can define charge definitions that can be associated with orders and invoices by creating charge categories. For more information about defining charge definitions, see the *Sterling Reverse Logistics: Configuration Guide*.

---


## Configure Extraneous Item/Wrong Item Rules

This configuration provides line types for extraneous items and for wrongly shipped items.

To configure extraneous and wrong item rules:

1. From the Channel Applications Manager, select Configure Return Administration.
2. Under Configure Return Administration, select Advanced Configurations.
3. Select Configure Extraneous Item/Wrong Item Rules.
4. Enter information in the applicable fields. The following table describes the fields in the Extraneous Item/Wrong Item Rules.

Field	Description
Line Types to Be Used For Extraneous Items	Define a line type for extraneous returns.
Line Types to Be Used For Wrongly Shipped Items	Define a line type for wrongly shipped items.

5. Click  to save your changes.




---

## Define Alert Types

You can classify the different alerts or exceptions that are raised by the system.

To define alert types:

1. In the Channel Applications Manager, click  icon adjacent to Configure Alert Management to expand the branch.
2. Select Define Alert Types.


For more information about defining exception types, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Alert Queues

You can define alert queues that can be used to group related alerts. Users can subscribe to one or more queues and can process alerts from their subscribed queues.


To define alert queues:

1. In the Channel Applications Manager, click  icon adjacent to Configure Alert Management to expand the branch.
2. Select Define Alert Types.

For more information about configuring alert queues, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.


---

## Configure User Alert Notifications

This configuration enables you to notify users about an alert. An  (alerts) icon is displayed with the current number of open alerts.

**Note:** To notify users about the alerts raised in their respective queues, ensure that the queues to which the users are subscribed to are audited.


To configure the user alert notifications:

1. In the Channel Applications Manager, click  icon adjacent to Configure Alert Management to expand the branch.
2. Select Configure User Alert Notifications.
3. Select the appropriate button to indicate users about alert notifications. The following table describes the fields in the Configure User Alert Notifications window.

---

Field	Description
Notify User Whenever an Alert is Assigned to the Current User	Select this to notify the current user that an alert assigned. If this option is chosen, you must set the time interval (in minutes) for the application to search for new alerts. The default time is set to 5 minutes.
Notify Users Whenever an Alert is Added to a Queue the User is Subscribed To	Select this to notify users about an alert added to a queue to which that user is subscribed. If this option is chosen, you must set the time interval (in minutes) for the application to search for new alerts. The default time is set to 5 minutes. By default, this option is selected.
Never Notify Users About Alerts	Select this if you do not want to notify users about alerts.
Search Alerts only for store logged in	Select this option to search alerts only for the store logged in
Polling Interval in Minutes	Enter the polling interval in minutes to poll for new alerts for which users need to be notified. The polling interval should be a valid number between 1 and 99,999.

---


4. Click  to save your changes.

---

## Define User Roles

You can define different user roles or user groups for your organization.

To define user roles:

1. In the Channel Applications Manager, click  icon adjacent to Define User Roles to expand the branch.
2. Select Define Classification Values.

For more information about defining user groups, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Users

This configuration enables you to define users for your organization.

### Define Users for a Call Center

The following table provides the menu description for call center users.

Users	Menu Description
All Users	Default Menu

### Define Users for a Store

The following table describes the menu description for store users.

Users	Menu Descriptions
All Users	Default Store Menu

For more information about defining users, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Teams

As an advanced configuration, you can define teams and associate users to them. You cannot associate one user to multiple teams.

Users can log in from one store to another store. To provide this capability, configure the team, which provides access to specific nodes and adds users to that team. For more information about defining teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Rules for Password Policies

As an advanced configuration, you can define and configure rules that govern the password policies. Rules can be created based on pre-defined rule types. For more information about defining rules, see the *Sterling Selling and Fulfillment Foundation: Password Policy Management Guide*.

---

## Configure Policy Parameters

As an advanced configuration, you can configure a password policy parameter once the rules have been defined. While rule definition specifies the framework, password policy parameters allow you to specify the actual values required for the rules. These values are used for rule validation. For more information about configuring policy parameters, see the *Sterling Selling and Fulfillment Foundation: Password Policy Management Guide*.



---

## Define Password Authentication Questions

As an advanced configuration, you can define a set of questions for user authentication during a new password request, password expiry, forgot password or password reset. These questions are set at the enterprise level. For more information about defining questions, see the *Sterling Selling and Fulfillment Foundation: Password Policy Management Guide*.

---

## Configure Password Policy Rules


As an advanced configuration, you can define a password policy rule to send a confirmation to the user when the user's password is reset. For more information about configuring the rule to send confirmation to users on password reset, see the *Sterling Selling and Fulfillment Foundation: Password Policy Management Guide*.

---

## Configure System Purge Criteria

You can define the parameters to be used when purging system-related records.

To configure the system purge criteria:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select Configure System Purge Criteria.


For more information about defining purge criteria, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Sales Order Purge Criteria

You can define the parameters to be used when purging sales order-related records.

To configure the sales order purge criteria:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select Configure Sales Order Purge Criteria.


For more information about configuring a document's purge criteria, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Work Order Purge Criteria

You can define the parameters to be used when purging work order-related records.

To configure the work order purge criteria:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select Configure Work Order Purge Criteria.


For more information about defining purge criteria, see the *Sterling Warehouse Management System: Configuration Guide*.

---

## Configure Return Order Purge Criteria

You can define the parameters to be used when purging return order-related records.

To configure return order purge criteria:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select Configure Return Order Purge Criteria.


For more information about configuring a document's purge criteria, see the *Sterling Reverse Logistics: Configuration Guide*.

---

## Configure Quote Purge Criteria

This configuration enables you to configure the parameters used when purging quotes from the system.

To configure the purge quote criteria:

1. In the Channel Applications Manager, click  icon adjacent to **System Administration** to expand the branch.
2. Select **Configure Quote Purge Criteria**.


For more information about configuring the quote purge criteria, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Opportunity Purge Criteria

This configuration enables you to configure the parameters used when purging quotes from the system.

To configure the purge quote criteria:

1. In the Channel Applications Manager, click  icon adjacent to **System Administration** to expand the branch.
2. Select **Configure Opportunity Purge Criteria**.

For more information about configuring the opportunity purge criteria, see the *Sterling Distributed Order Management: Configuration Guide*.




---

## Define Agent Criteria Groups

You can configure the agent criteria groups that classify the nodes. This is a node level configuration that indicates whether the agent is handling high or low volume data.

To define agent criteria groups:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select Define Agent Criteria Groups.


For more information about defining agent criteria groups, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Initial Context Factory Codes

You can configure additional initial context factory codes to define the class providing an initial context implementation for the application server to enable remote java clients to connect.

To define initial context factory codes:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select Define Initial Context Factory Codes.


For more information about defining initial context factory codes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define View Servers

You can view a list of configured servers for agents and services. You can specify server parameters like monitor start time and idle wait time.

To define view servers:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select View Servers.


For more information about viewing the list of configured servers, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Health Monitor Rules

You can configure parameters for monitoring the health of your application.

To configure health monitor rules:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select Configure Health Monitor Rules.


For more information about defining health monitor rules, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Pagination Rules

As an advanced configuration, you can configure rules that determine the display of the pagination panel. You can configure to allow search on history records and also if the total number of records for a search criteria should be displayed.


To configure the pagination rules:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Select the Advanced Configurations link.
3. Select Configure Pagination Rules.
4. Choose the appropriate options. The following table describes the fields in the Pagination Rules window.

---

Field	Description
Automatically Search For History Orders When No Non-History Orders Have Been Found In the Order Search Screen	Select this option to search for history records when non-history records are not found in the Order Search screen.
Never Display The Total Number Of Records	Select this option not to display the total number of records.
Always Display The Total Number Of Records	Select this option to display the total number of records.
Allow The User To Request The Display The Total Number Of Records	Select this option to allow to user to request for the display the total number of records.

---



5. Click  to save your changes.

---

## Configure Announcement Rules

As an advanced configuration, you can configure the exception type and the polling interval for announcements.

To configure the announcement rules:


1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Announcement Rules.
4. Select an alert type from the Alert Type To Be Used For Announcement drop-down list.
5. Enter the Polling Interval in Minutes to specify the intervals at which the application must search for new announcements. By default, the polling interval is set to 10 minutes.
6. Click  to save your changes.

---

## Define Qualified Tag Type

As an advanced configuration, you can define qualified tag type details.

To define a qualified tag type:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Define Qualified Tag Type.


For more information about defining qualified tag types, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Qualified Tags

As an advanced configuration, you can define a list of Qualified Tags for the rules and common codes pertaining to a particular version of the Sterling Call Center and Sterling Store application. You can associate one or more qualified tags with a particular Qualified Tag Type.

To define a qualified tag:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Define Qualified Tag.

For more information about defining Qualified Tags, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.




---

## Configure Qualified Tag and Application Compatibility

As an advanced configuration, you can associate the Installed Application Code and Application Version with a particular Qualified Tag.

To configure qualified tag and application compatibility:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Qualified Tag and Application Compatibility.




For more information about configuring the qualified tag and application compatibility, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Version-Specific Rules

As an advanced configuration, you can specify different values for rules based on the version of the application that is accessing the rule.

To configure version-specific rules:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Version-Specific Rules.
4. To configure the rules with the default values, select the Default Value option.  
To configure the rules based on a version-specific qualifier, select the Version-Specific Rule For Qualified Tag option and select a qualifier from the Qualifier drop-down list.
5. In the Rules For Displaying Fulfillment Summary Screens panel, select the type of Fulfillment Summary screen to be displayed, and select a scheduling rule from the Scheduling Rule For Additional Shipping Option drop-down list. Click .
6. In the Rule For Enabling Tax Options For Business Customers panel, select the Change Tax Options for a business customer check box to enable users to change the tax options defined for a business customer. Click .




**Note:** If you have selected a qualifier, but have not configured any of the rule values, a message is displayed, indicating that the rule values are not configured for the qualifier.

---

## Configure Version-Specific Common Codes for Sales Orders

As an advanced configuration, you can specify different values for the common codes based on the version of the application.

To configure version-specific common codes:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Version-Specific Common Codes for Sales Orders.
4. Click  to add a new cancellation reason.
5. Enter information in the applicable fields. The following table describes the fields in the Common Code Details window: Click .

---

Field	Description
Qualified Tag Id	Select a Qualifier Tag ID from the drop-down list.
Cancellation Reason	Enter a cancellation reason.
Short Description	Enter a short description for the cancellation reason.
Long Description	Enter a long description for the cancellation reason.




---

---

## Configure Version-Specific Common Codes for Return Orders

As an advanced configuration, you can specify different values for the common codes based on the version of the application.

To configure version-specific common codes:

1. In the Channel Applications Manager, click  icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Version-Specific Common Codes for Return Orders.
4. Click  to add a new cancellation reason.
5. Enter information in the applicable fields. The following table describes the fields in the Common Code Details window: Click .

---

Field	Description
Qualified Tag Id	Select a Qualifier Tag ID from the drop-down list.
Cancellation Reason	Enter a cancellation reason.
Short Description	Enter a short description for the cancellation reason.
Long Description	Enter a long description for the cancellation reason.


---

---

## Configure Region Schema

You can define the region schema the organization you are configuring uses for selling.

To define region schema:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Pricing Administration** to expand the branch.
2. Select **Configure Region Schema**.


For more information about defining region schemas, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Pricing Organization Rules

You can configure the rules that are defined by the pricing organization. These rules affect how the pricing engine calculates prices. In addition, this section describes the rules that affect the Pricing Administration user interface in IBM® Sterling Business Center.

To define pricing organization rules:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Pricing Administration** to expand the branch.
2. Select **Configure Pricing Organization Rules**.


For more information about defining pricing organization rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure Pricing Enterprise Rules

You can configure the rules that are defined by the enterprise of the pricing organization. These rules control the behavior of the price list selection based on assignments.

To define pricing enterprise rules:

1. In the Channel Applications Manager, click  icon adjacent to **Configure Pricing Administration** to expand the branch.
2. Select **Configure Pricing Enterprise Rules**.

For more information about defining pricing enterprise rules, see the *Sterling Distributed Order Management: Configuration Guide*.

---

## Configure User Exit Management

You can configure user exits to enable business logic extensions to the various transactions. The transactions invoke user exits so that you may plug-in custom logic by implementing these pre-defined user exits. For more information about defining user exit implementations, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.



---

## Customize the Application Menus

You can define menus to allow users to view them after logging into the application. For more information about defining menus, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Extended Application Resources

You can define new resources that you can use to enable your extended components that are permission-controlled. When you create a resource, you can grant or revoke permission to this resource through the user role configuration. For more information about defining resources, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

The reference implementation provides transactional and configurational data to demonstrate the functionality of all the features. Additionally, you can use the data provided in the reference implementation as a starting point for your implementation. Although the data provided needs to be used exactly as it is given, it helps you understand how to configure the application to suit your business needs.

---

## Define Themes

You can define new color themes that are used in the Sterling Selling and Fulfillment Foundation Console and the Applications Manager screens. For more information about defining themes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Custom Common Code Types

You can configure custom common code types for your application. Common codes are values that enable a user to choose from options rather than having to enter the data manually. For more information about defining custom common code types, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Custom Common Codes

You can configure common code values for the custom common code types for your application. For more information about defining custom common code values, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Define Custom Error Codes

You can define custom error codes and the descriptions to be used along with the default error codes. For more information about defining custom error codes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*

---

## Define Store Users

You can define the user of a store belonging to the Enterprise. A user is a single person assigned with a certain task, such as Hub Administrator or store manager, depending on what role the user plays in the organization. For more information about defining users, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Store Devices

You can configure store devices such as printers, weighing scale, and so forth. For more information about defining a device type, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.



---

## Configure Store Print Documents

You can configure the print documents pertaining to a store such as receiving worksheet, cycle count worksheet, and so forth. For more information about defining print documents, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Return Order Receiving Preferences

You can configure the return order receiving preferences pertaining to a store. For more information about defining receiving preferences, see the *Sterling Warehouse Management System: Configuration Guide*.

---

## Configure Data Security

As an advanced configuration, you can control access to data by the users. If a user is not associated with a data security group, the user is considered to have default access. For more information about defining data security groups, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

---

## Configure Barcodes


As an advanced configuration, you can configure barcodes which are machine-readable symbols comprising black-and-white patterns of bars and stripes, or in some cases checkerboard-like grids. Bits of information are encoded within barcodes. This data is read by barcode scanners, and is often used in conjunction with databases. For more information about defining barcodes, see the *Sterling Warehouse Management System: Configuration Guide*.

---

## Configure Backroom Pick Rules

As an advanced configuration, you can specify if the shipment should move to the Ready for Backroom Pick status in the shipment pipeline.

To configure a backroom pick rule:

1. From the Channel Applications Manager, select Store-Specific Tasks.
2. Select the Advanced Configuration link.
3. Select Configure Backroom Pick Rules. The Load Store Configuration pop-up screen is displayed. Select the store from the drop-down list and click OK. The Backroom Pick Required screen is displayed.
4. Select the Backroom Pick Required check box if the shipment should move to Ready for Backroom Pick status in the shipment pipeline.
5. Click  to save your changes.

---

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