

# Customer Order Management PCA

## Concepts

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# Contents

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## Preface

Intended Audience .....	ix
Structure .....	ix
Documentation .....	ix
Conventions .....	xi

## 1 Introducing the Sterling Customer Order Management PCA

1.1	Business Challenges .....	1
1.2	Components of the Sterling Customer Order Management PCA Solution.....	2
1.2.1	Enterprise Data.....	3
1.2.2	Order Promising .....	4
1.2.3	Participant Modeling .....	6
1.2.4	Delivery and Installation .....	7
1.2.5	Products .....	8
1.2.6	Payments.....	9
1.2.7	Order Administration .....	9
1.2.8	Order Monitoring.....	10
1.2.8.1	Document Types .....	10
1.2.8.2	Repositories .....	11
1.2.8.3	Process Type Pipelines .....	12
1.2.8.4	Transactions.....	15
1.2.8.4.1	Externally-Triggered Transactions.....	15
1.2.8.4.2	User-Triggered Transactions .....	16
1.2.8.4.3	Time-Triggered Transactions.....	16
1.2.8.5	Conditions.....	16

1.2.8.6	Events .....	16
1.2.8.7	Statuses .....	16
1.2.8.8	Actions .....	17
1.2.8.9	Services.....	17
1.2.9	Logistics.....	17
1.2.10	Process Modeling and Monitoring .....	17
1.2.10.1	Create .....	18
1.2.10.2	Schedule .....	19
1.2.10.3	Release.....	19
1.2.10.4	Ship .....	20
1.2.10.5	Return .....	20
1.2.10.6	Close .....	21
1.2.10.7	Purge .....	21
1.2.11	Inventory Visibility and Monitoring.....	21
1.2.12	Event Management and Alerts.....	22
1.2.13	Security.....	22
1.2.14	Returns.....	23
1.2.15	System Administration .....	23
1.2.16	Advanced System Setup.....	24
1.2.17	Customizations .....	24
1.3	Call Center Features .....	24
1.3.1	Alerts .....	25
1.3.2	Searches.....	26
1.3.3	Order Tasks.....	26
1.3.4	Delivery Tasks .....	28
1.3.5	Miscellaneous Tasks.....	29
1.3.6	Frequent Queries.....	30
1.4	Store Order Management Features .....	31
1.4.1	Alerts .....	31
1.4.2	Searches.....	32
1.4.3	Order Tasks.....	32
1.4.4	Delivery Tasks .....	34
1.4.5	Miscellaneous Tasks.....	35
1.4.6	Frequent Queries.....	36

---

1.4.7	Managing Users .....	37
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**Index**



# Preface

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This manual provides general concepts and explanations about the different features in the Sterling Customer Order Management PCA.

## Intended Audience

This manual is intended to provide a high-level overview to all users of the Sterling Customer Order Management PCA.

## Structure

This document contains the following sections:

### **Chapter 1, "Introducing the Sterling Customer Order Management PCA"**

This chapter introduces the Sterling Customer Order Management PCA and details how it can be used in different business environments.

## Documentation

For more information about the Sterling Customer Order Management PCA<sup>®</sup> components, see the following manuals in the Sterling Customer Order Management PCA<sup>®</sup> documentation set:

- *Sterling Customer Order Management PCA<sup>®</sup> Release Notes*
- *Sterling Customer Order Management PCA<sup>®</sup> Installation Guide*
- *Sterling Customer Order Management PCA<sup>®</sup> Concepts*
- *Sterling Customer Order Management PCA<sup>®</sup> Implementation Guide*

- *Sterling Customer Order Management PCA® User Guide*
- *Sterling Customer Order Management PCA® Upgrade Guide*
- *Sterling Customer Order Management PCA® Javadocs*

For more information about the Sterling Supply Chain Applications® components, see the following manuals in the Sterling Supply Chain Applications® documentation set:

- *Sterling Supply Chain Applications® Release Notes*
- *Sterling Supply Chain Applications® Installation Guide*
- *Sterling Supply Chain Applications® Upgrade Guide*
- *Sterling Supply Chain Applications® Performance Management Guide*
- *Sterling Supply Chain Applications® High Availability Guide*
- *Sterling Supply Chain Applications® System Management Guide*
- *Sterling Supply Chain Applications® Localization Guide*
- *Sterling Supply Chain Applications® Customization Guide*
- *Sterling Supply Chain Applications® Integration Guide*
- *Sterling Supply Chain Applications® Product Concepts*
- *Sterling Warehouse Management System® Concepts Guide*
- *Sterling Supply Chain Applications Platform® Configuration Guide*
- *Sterling Distributed Order Management® Configuration Guide*
- *Sterling Supply Collaboration® Configuration Guide*
- *Sterling Global Inventory Visibility® Configuration Guide*
- *Sterling Product Management® Configuration Guide*
- *Sterling Logistics Management® Configuration Guide*
- *Sterling Reverse Logistics® Configuration Guide*
- *Sterling Warehouse Management System® Configuration Guide*
- *Sterling Supply Chain Applications Platform® User Guide*
- *Sterling Distributed Order Management® User Guide*
- *Sterling Supply Collaboration® User Guide*

- *Sterling Global Inventory Visibility<sup>®</sup> User Guide*
- *Sterling Logistics Management<sup>®</sup> User Guide*
- *Sterling Reverse Logistics<sup>®</sup> User Guide*
- *Sterling Warehouse Management System<sup>®</sup> User Guide*
- *Sterling Supply Chain Mobile Application<sup>®</sup> User Guide*
- *Sterling Supply Chain Analytics<sup>®</sup> Guide*
- *Sterling Supply Chain Applications<sup>®</sup> Javadocs*
- *Sterling Supply Chain Applications<sup>®</sup> Glossary*
- *Sterling Parcel Carrier Adapter<sup>®</sup> Guide*
- *Sterling Application Server<sup>®</sup> Installation Guide* (for optional component)

For a description of the various documents in the Sterling Customer Order Management PCA<sup>®</sup> documentation set, see the Sterling Customer Order Management PCA<sup>®</sup> documentation home page at:

`<YFS_HOME>/documentation/YCD_doc_home.html`

where `<YFS_HOME>` = `<YANTRA_HOME>/Runtime`

and `<YANTRA_HOME>` is the directory where this PCA and the Sterling Supply Chain Applications<sup>®</sup> are installed.

## Conventions

The following conventions may be used in this manual:

Convention	Meaning
...	An ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
mono-spaced text	Mono-spaced text indicates a file name, directory path, attribute name, or an inline code example or command.
/ or \	Slashes and backslashes are file separators for Windows, UNIX and LINUX operating systems. The file separator for the Windows operating system is "\" and the file separator for Unix and Linux systems is "/". The Unix convention is used unless otherwise mentioned.

Convention	Meaning
<YANTRA_HOME>	User-supplied location of the Sterling Supply Chain Applications installation directory.
<YFS_HOME>	Location of the generated <YANTRA_HOME>/Runtime directory.

# Introducing the Sterling Customer Order Management PCA

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This chapter explains the customer order management business challenges and how the Sterling Customer Order Management PCA assists you in solving them.

The following topics are covered in this chapter:

- Sterling Customer Order Management PCA Business Challenges
- Components of the Sterling Customer Order Management PCA Solution
- Call Center Application Features
- Store Order Management Application Features

The Sterling Customer Order Management PCA presents solutions to the challenges found in typical customer order management business scenarios.

## 1.1 Business Challenges

Retailers typically have multiple channels from which orders are generated. In addition to physical stores, the retailers usually provide other customer order channels such as web sites.

No matter which channel an order is placed in, the customers expect the inventory information that they view to be accurate, their orders to be delivered to the correct address, and the promised delivery dates to be met.

Retailers must maintain customer satisfaction by giving the customer a smooth and hassle-free experience. The interaction with a customer may

occur through a call to the call center, web-site navigation, or through a customer's visit to a local store. In all such situations, the retail must present a consistent face to the customer.

To minimize fulfillment costs, the customers' orders have to be captured accurately and fulfilled as accurately as possible. For example, the retailer wants the products sourced from the optimal ship nodes and the shipments to be consolidated to minimize costs. The retailer also needs to have accurate visibility to the inventory.

Retailers must be able to handle exceptions quickly and smoothly. Customers should be able to request modifications to orders after they are placed.

Web order channels also pose other unique problems for a retailer. For example, because an order can be entered by anyone with access to the web site, retailers need to protect themselves from fraudulent orders. The addresses entered by the customer need to be validated to ensure proper delivery.

The Sterling Customer Order Management PCA helps satisfy these requirements by providing:

- Rich functionality around process modeling, order sourcing, inventory management, and monitoring.
- Features to simplify the integration points between external systems, including front-end systems, payment systems, and address verification systems.
- A user interface to handle call center order modifications.
- A user interface to handle store walk-in order modifications.

## 1.2 Components of the Sterling Customer Order Management PCA Solution

The Sterling Customer Order Management PCA solution solves the customer order business challenges at the following levels:

- [Enterprise Data](#)
- [Order Promising](#)
- [Participant Modeling](#)

- Delivery and Installation
- Products
- Payments
- Order Administration
- Order Monitoring
- Logistics
- Process Modeling and Monitoring
- Inventory Visibility and Monitoring
- Event Management and Alerts
- Security
- Returns
- System Administration
- Advanced System Setup
- Customizations

### 1.2.1 Enterprise Data

An Enterprise represents the organization that owns and controls all transactions in the Sterling Customer Order Management PCA. An Enterprise in the Sterling Customer Order Management PCA 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. 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.

- Every transactional document (order, shipment, load) in the Sterling Customer Order Management PCA requires a designated Enterprise.

## 1.2.2 Order Promising

To ensure that all customer orders are fulfilled accurately and efficiently, the Sterling Customer Order Management PCA provides rich order promising functionality.

In the supply chain industry, the products or services requested by means of an order must be checked for availability, promised, scheduled for shipment or delivery, and then released (shipped or delivered).

As a part of its Order Promising functionality, the Sterling Customer Order Management PCA provides configurable rules that are used for controlling the selection of nodes and shipping dates for both products and services.

There are a number of parameters that are factored in when deciding which warehouse to use as a ship node for an order. For example:

- Product Type
- Shipping destination
- Product availability at the node
- Number of shipments required
- Node priority
- Customer constraints
- Geopolitical constraints

To help you understand the capabilities of these Order Promising features, this section describes the Sterling Customer Order Management PCA concepts associated with promising functions and provides information about the required setup to achieve your business objectives.

Order promising functionality is provided for products being shipped as well as service requests (delivery and provided services).

To understand how all of this is accomplished in the Sterling Customer Order Management PCA, you should first be familiar with the following common terms associated with order promising:

### **Node**

A node is a physical location to or from where a product is shipped, returned, or delivered.

When a node is specified on an order line, it indicates the intent to fulfill the order line from that node. If the node is a firm predefined node, order promising functionality ensures that the order line is fulfilled from only this node.

However, certain business requirements may require inventory to be reserved for an order as soon as it is created. This inventory reservation is achieved by specifying the ship node where inventory is reserved on the order line. The node specified for reservation may not be the most optimal node to fulfill the order. In this scenario, the node can be marked as a non-firm node. When promising the order, the Sterling Customer Order Management PCA's scheduling functionality tries to find alternate nodes where inventory may be available based upon the sourcing setup.

By default, the Sterling Customer Order Management PCA treats each node supplied on the order line as a firm node unless otherwise stated.

### **Distribution Group**

A distribution group is a set of nodes or organizations defined for distributing products or services.

### **Available to Promise Rules**

Available to Promise (ATP) rules help to set up a monitoring system for tracking inventory item availability and raise specific actions when the inventory falls below a specified minimum level. The availability of an item can be tracked on the current day, subsequent days within the ATP time frame, and subsequent days outside the ATP time frame. This enables you to more accurately order supplies to meet current and future demand.

### **Scheduling**

Scheduling is the process of:

- Determining the shipping node or supplier for product fulfillment or the service provider for service fulfillment. This logical process step is referred to as "Sourcing".
- Determining the dates when the product or service will be shipped or delivered.

- Reserving the inventory at the shipping location for the shipment date. However, if inventory is already reserved for a product line scheduling does not attempt to re-check inventory.

### Scheduling Rules

Scheduling rules control common scheduling parameters such as:

- When an order should be scheduled.
- How many days ahead should product availability be checked (if you are promising against future inventory).
- What type of optimization should be used for scheduling.

For example, you can optimize based on date so that the Sterling Customer Order Management PCA chooses a shipping node that can deliver on the earliest date. You can also optimize based on the number of shipments so that the Sterling Customer Order Management PCA minimizes the total number of shipments required; even though it may end up getting delivered at a later date.

- Ship complete order or ship complete line parameters.

### Sourcing Rules

Sourcing rules control which node, external organization, or group of nodes should be considered for sourcing a product based on the product, item classifications, ship-to region, and other parameters.

## 1.2.3 Participant Modeling

The business entities that participate as trading partners with an enterprise in the supply chain are referred to as Participants in the Sterling Customer Order Management PCA. Participants can be given different roles. For example, a participant can have an Enterprise, Buyer, Seller, Node, or Carrier role. Each role defined for a participant gives it a certain set of abilities and attributes.

Each participant can have its own attributes defined, such as shipping and billing addresses, communication protocols or calendars. Additionally, relationships between participants can be created using parent and child hierarchy and the supply chain network model.

If a participant is given a role of an Enterprise, it can maintain its own inventory and catalog.

For more information about participant Modelling, see the *Sterling Supply Chain Applications Product Concepts* and the *Sterling Customer Order Management PCA Implementation Guide*.

### 1.2.4 Delivery and Installation

In addition to shipped products, the Sterling Customer Order Management PCA provides the capability to manage the execution of delivery services and provided services.

Shipped products are physical products that are purchased and shipped to a customer, such as a piano.

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.

For each service, a list of valid service options is also created as items are associated to the respective service item.

Besides setting up Delivery and Provided Service items, the catalog must also include the definition of the list of delivery and provided service items available for products. This association can be set up at either a level within an Item Classification hierarchy or at an individual product item level.

A Resource Pool in the Sterling Customer Order Management PCA represents the group of individual resources that perform the services. It is the primary mechanism of defining and managing capacity within the Inventory Management module of the Sterling Customer Order Management PCA. Note that it is not intended to represent every individual resource that actually performs the service and it is only a means to represent an aggregate service resource. Defining a resource pool gives you the option to define capacity at the resource pool level or at the service resource level. Even when capacity is maintained at the

resource pool level, service resources can still be defined for informational purposes.

Every resource pool belongs to one provider organization that owns the resource pool. A resource pool can either provide delivery services or provided services.

Also, a resource pool is associated with a single node. For a delivery service resource pool, this represents the node from where the delivery is made. For a provided service resource pool, this simply represents the node that is responsible for the management of the resource pool capacity.

You can define the:

- Regions that resource pool serves and the day of the week as well as time of day when it serves these individual regions
- Standard capacity on a day-of-the-week basis
- Additional capacity
- Supplemental capacity
- Capacity overrides on an exception day basis
- Calendar associated with the resource pool

The Sterling Customer Order Management PCA promising functions check capacity availability against the resource pools that match the service and geography requirements of the order line.

### 1.2.5 Products

The Sterling Customer Order Management PCA provides you with the capability to manage all of your products and services through catalogs and catalog organizations.

A catalog is an organization's complete set of items. You can use the Sterling Customer Order Management PCA to create these items in a master catalog. These items can then be grouped into categories according to your business practices.

The product definition may reside within the Sterling Customer Order Management PCA or within an external system. The Sterling Customer Order Management PCA provides extension points if the products are maintained externally.

For more information about Product Management see the *Sterling Supply Chain Applications Product Concepts* and the *Sterling Customer Order Management PCA Implementation Guide*.

### 1.2.6 Payments

The Sterling Customer Order Management PCA can be used to carry out the critical payment related processes during order management processing and enables you to integrate with external payment processing systems such as CyberSource or PaymentTech. Payment processing involves payment authorization, settlement, and invoicing.

There is a wide variety of payment types that can be used to pay for the orders. For example, the customers may want to use a stored value card issued by the store, a check, a credit card, multiple credit cards, or a combination of the above. Additionally, the order may have already been paid for prior to its capture in the fulfillment system.

Payment processing is also relevant for returns when refunds have to be issued to customers or uneven exchanges when new items are being added to an exchange order.

In addition to all the typically used payment types, the Sterling Customer Order Management PCA provides integration points with payment systems to validate the payment methods on the orders.

### 1.2.7 Order Administration

Once an order is captured it may need to be modified at various points throughout its life cycle. For example, the customer 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 supervisor may need to give a credit to the customer in order satisfy the customer.

The Sterling Customer Order Management PCA understands the typical modifications that are frequently made to the orders and provides a task-based call center user interface to perform these modifications.

The Sterling Customer Order Management PCA also provides configurable rules to control how and when modifications can be performed.

## 1.2.8 Order Monitoring

When orders reach certain important milestones (for example, at shipment time), it is valuable for the customers to be notified. Similarly, it is also useful for the customer to be notified when a shipment is being delayed and when promised ship dates look like they will not be met. The Sterling Customer Order Management PCA has built-in mechanisms to monitor orders and either raise alerts or send e-mail notifications if applicable.

Process modeling in the Sterling Customer Order Management PCA enables you to set up your business workflow of orders, inventory changes, returns, payment authorizations, or many other system events.

A typical business process model consists of:

- [Document Types](#)
- [Repositories](#)
- [Process Type Pipelines](#)
- [Transactions](#)
- [Conditions](#)
- [Events](#)
- [Statuses](#)
- [Actions](#)
- [Services](#)

### 1.2.8.1 Document Types

The Sterling Customer Order Management PCA uses base document types and document types to carry information through a configured workflow process. A base document type defines the business documents that the Sterling Customer Order Management PCA handles and defines a common storage structure for all derived document types.

The following base document types are defined in the Sterling Customer Order Management PCA:

- Order
- Load

- General
- Count
- Container
- Outbound Picking
- Work Order

Document types are specific business documents that are derived from a base document type. For example, document types such as Sales Order and Purchase Order can be derived from the Order base document type.

The following document types are defined in the Sterling Customer Order Management PCA:

- Planned Order
- Sales Order
- Purchase Order
- Return
- Template Order
- Transfer Order
- Load
- General
- Count
- Container
- Outbound Picking
- Work Order

Business rules such as payment collection rules and modification rules must be set up for each document type. For more information about setting up business rules for document types, see the *Sterling Supply Chain Applications Platform Configuration Guide*.

### **1.2.8.2 Repositories**

A repository is a logical collection of entities that define a given business process.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Services

The Sterling Customer Order Management PCA provides a repository for each of the process types. When creating a new process type from a base process type, the corresponding base repository entities are copied and attached to the new process type. For example, when a Sales Order Fulfillment process type is created from the Fulfillment base process type, the base repository entities contained in the Fulfillment base process are copied and attached to Sales Order Fulfillment process.

### 1.2.8.3 Process Type Pipelines

In the Sterling Customer Order Management PCA, a business document, such as an Order, goes through a series of defined processes. These processes are called Base Process Types. Every type of base document has a defined set of base process types. For example, the Order base document type has the following base process types defined for it:

- Fulfillment
- Negotiation
- Delivery

The Load base document type has the Load base process type defined for it.

The General base document type has the General base process type defined for it.

You configure the flow of these processes in Sterling Supply Chain Process Modeling by creating process type pipelines. A Process Type Pipeline is a series of transactions and statuses that guide document types, such as Sales Order and Purchase Order, through a related process. A pipeline consists of the different statuses a document goes through during fulfillment. You can also set up transactions consisting of

events, actions, and conditions, as they pertain to the pipeline you are configuring.

The following tables detail each base process type, the process types that are derived from them, and the pipelines associated with the process type.

**Table 1–1 Order Fulfillment Base Process Type**

Derived Process Types	Process Type Pipelines
Order Fulfillment	Sales Order Fulfillment
Planned Order Execution	Planned Order Execution
Template Order	None
Reverse Logistics	Reverse Logistics, Consumer Returns
Purchase Order Execution	Purchase Order Execution, Drop Ship Purchase Order Execution
Transfer Order Execution	Transfer Order Execution

**Table 1–2 Order Negotiation Base Process Type**

Derived Process Types	Process Type Pipelines
Order Negotiation	Order Negotiation
Planned Order Negotiation	Planned Order Negotiation
Purchase Order Negotiation	Purchase Order Negotiation

**Table 1–3 Receipt Base Process Type**

Derived Process Types	Process Type Pipelines
Return Receipt	Return Receipt
Purchase Order Receipt	Purchase Order Receipt
Transfer Order Receipt	Transfer Order Receipt

**Table 1–4 Order Delivery Base Process Type**

Derived Process Types	Process Type Pipelines
Outbound Shipment	Outbound Shipment
Inbound Shipment	Inbound Shipment

**Table 1–5 Load Delivery Base Process Type**

Derived Process Types	Process Type Pipelines
Load Execution	Load Execution

**Table 1–6 General Base Process Type**

Derived Process Types	Process Type Pipelines
General	None

**Table 1–7 ‘Pack Process’ Process Type**

Derived Process Types	Process Type Pipeline
Pack Process	Pack Process

**Table 1–8 Count Execution Process Type**

Derived Process Types	Process Type Pipelines
Count Execution	Count Execution

**Table 1–9 Outbound Picking Process Type**

Derived Process Types	Process Type Pipelines
Outbound Picking	Standard Pick Process

**Table 1–10 VAS Process Type**

Derived Process Types	Process Type Pipelines
VAS	VAS Work Order

### 1.2.8.4 Transactions

Every base process type has a set of base transactions defined for it. A Transaction is a logical unit of work that is necessary for performing an activity within the Sterling Customer Order Management PCA. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

In the Sterling Customer Order Management PCA, APIs are used to execute transactions. When an API is invoked, the Transaction ID is determined based on the context that the API was executed. The Transaction ID identifies the transaction to be executed. Depending on the situation, the transaction ID can be passed as an input parameter or it can be pre-defined for the invoking API. For more information about APIs, see the *Sterling Supply Chain Applications Javadocs*.

Transactions can be classified as one or more of the following types:

- [Externally-Triggered Transactions](#)
- [User-Triggered Transactions](#)
- [Time-Triggered Transactions](#)

#### 1.2.8.4.1 Externally-Triggered Transactions

An Externally-triggered transaction is performed through the Sterling Customer Order Management PCA's Services Definition Framework which calls a corresponding API within the Sterling Customer Order Management PCA to execute the transaction.

### 1.2.8.4.2 User-Triggered Transactions

A User-triggered transaction is executed based on user actions performed in the Sterling Customer Order Management PCA User Interface, configured alert queue, or an e-mail exchange.

### 1.2.8.4.3 Time-Triggered Transactions

A Time-triggered transaction is executed on scheduled intervals. In the Sterling Customer Order Management PCA, a time-triggered transaction is also called an agent.

### 1.2.8.5 Conditions

A Condition matches document type attributes against decision points and routes the document to the appropriate path based on the specified attribute and value combinations. The document type attributes against which conditions can be created are pre-defined in the Sterling Customer Order Management PCA. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For example, at a certain point in a Sales Order Fulfillment process-type pipeline you set up a condition to determine if an order contains hazardous materials. When an order reaches this condition in the pipeline, it cannot proceed any further until the condition is met with a definitive Yes or No value. In this example, if the order contains no hazardous materials, the value is No and the order continues through the regular pipeline. If the order contains hazardous materials, the value is Yes and the order is sent down an alternate branch of the order pipeline that has been configured to deal with hazardous material orders.

### 1.2.8.6 Events

An Event is a specific occurrence in the business process; often a status change or generated alert. Releasing an order and cancelling an order are both examples of events. When an event occurs in a transaction an action is triggered.

### 1.2.8.7 Statuses

Statuses are the actual states that a document changes to and from as it moves through the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a

Drop Status when a transaction and its events have been completed. A Pickup Status takes the document from the drop status and moves it through the next transaction. "Created" and "Scheduled" are examples of statuses.

### **1.2.8.8 Actions**

An Action is a process or program that is triggered by an event. These processes and programs send alert notifications and automatically resolve issues.

For example, when an order is released (the event), you can set an action to send the customer an e-mail message.

### **1.2.8.9 Services**

Services define the business process flow between the Sterling Customer Order Management PCA and external systems.

## **1.2.9 Logistics**

The Sterling Customer Order Management PCA Logistics Management provides the capabilities for managing and executing an inbound or outbound delivery process. It accepts, stores and then manages 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. It coordinates all activities among all parties in the delivery chain, and pro-actively monitors events and notifies participants when deviations have occurred. Shipment and delivery records are tied to the original sales or purchase orders for management of dependencies among orders and shipments. It provides post-delivery reconciliation of performance, comparing actual vs. promised, SLA metric analysis, participant performance, and so forth.

## **1.2.10 Process Modeling and Monitoring**

The life cycle of an order is long and complex. It starts with capturing the customer's order into a system and then 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.

For more information about pipelines and Process Modeling, see the *Sterling Supply Chain Applications Product Concepts* and the *Sterling Supply Chain Applications Platform Configuration Guide*.

The Sterling Customer Order Management PCA Sales Order Fulfillment pipeline is used to process orders of the Sales Order document type within the Sterling Customer Order Management PCA.

Orders in this pipeline can be processed by the following types of transactions:

- [Create](#)
- [Schedule](#)
- [Release](#)
- [Ship](#)
- [Return](#)
- [Close](#)
- [Purge](#)

### 1.2.10.1 Create

The first step in fulfilling an order is capturing it. Orders can be captured from a web portal or an external order entry system. The data or the orders are passed to the `createOrder()` API and processed through the `Create Draft Order` and `Create Order` transactions. Both transactions have the same end results, since the order is either dropped into `Created`, `Reserved`, or `Back Ordered` status before it is picked up by the `Schedule` transaction. However, using the `Create Draft Order` transaction

places the order into one of two intermediate statuses, either `Draft Order Created` or `Draft Order Reserved`, where most of the order's attributes can still be modified.

Once the order is ready to be processed, it can be confirmed, through the `Confirm Draft Order` transaction.

The next step is for the order to be scheduled for delivery.

### 1.2.10.2 Schedule

The scheduling process schedules an order so that it can be delivered to the customer. Important shipment attributes such as delivery dates and ship nodes are determined at this point.

The `Schedule` transaction attempts to process orders in the following statuses: `Reserved`, `Back Ordered`, `Unscheduled`, and `Created`. If the orders in `Back Ordered` or `Reserved` status cannot be processed by the `Schedule` transaction, they wait for a predefined time interval before being reprocessed. For more information about reprocessing, see the *Sterling Distributed Order Management Configuration Guide*.

If orders in the `Created` status cannot be scheduled because of insufficient inventory, they are dropped into the `Back Ordered` status and wait to be reprocessed.

If the `Schedule` transaction is successful, but the specified ship node on the order line does not have enough inventory for the shipment and needs to procure its inventory from another node, the creation of a chained order is required. The order is dropped into `Awaiting Chained Order Creation` status where once it is processed by the `Chained Order Create` transaction, it waits to be processed for shipment.

If chained order creation is not required, the order is dropped into the `Scheduled` status. If the ship node is a drop-ship node, the order is released to the node.

### 1.2.10.3 Release

Once the Sterling Customer Order Management PCA has determined one or more ship nodes that can be utilized to ship the ordered merchandise, those nodes are notified with all of the relevant information necessary to send the shipment. This is the `Release` process.

The `Release` transaction takes orders that are in the `Scheduled` status and sends the notification to the nodes. Occasionally, the `Schedule`

transaction's inventory picture and the actual inventory picture at the nodes can get out of synch. When this happens, the `Schedule` transaction sends a notification to a node asking for inventory that does not actually exist. The node then notifies the Sterling Customer Order Management PCA that it cannot fulfill the order due to insufficient inventory, and the order is backordered from the node. The order is then dropped into `Back Ordered` status, and waits to be reprocessed by the `Schedule` transaction at a later time.

If the node has successfully received the release and it has inventory available, the order is shipped.

### 1.2.10.4 Ship

The shipment-related transactions use the information included in the release sent to the warehouse to plan for shipments as efficiently as possible.

When several shipments are going to the same location and can be grouped within the same loads, they can be consolidated together to minimize cost while still meeting the promised delivery dates. If shipment consolidation is required, shipments must be consolidated together before the actual shipment, as represented in the pipeline by the `Consolidate To Shipment` transaction.

Orders can be included in or removed from existing shipments before the actual shipment occurs, with the `Include Order In Shipment` and `Remove Order From Shipment` transactions.

At this point, an order can be considered complete and, in time, is closed and purged from the system. However, if the customer decides to return the merchandise they received, the order's life cycle continues.

### 1.2.10.5 Return

Once the customer has received a shipment, they may find that there is something wrong with the merchandise. For example, some items in the order may be the wrong color, or may have been damaged in transit. The `Include In Return` transaction creates a return order that must be shipped back to a warehouse to be examined.

After a return is created, it must be received and processed by the warehouse. The return's life cycle is handled by the `Reverse Logistics` pipeline. The `Customer Order Management Sales Order Fulfillment`

pipeline listens to the status of the return and updates the status of the order accordingly.

Therefore, when a return is received, the order goes to `Return Received` status through the `Receive Return` listener transaction.

Similarly, if the return is cancelled in the `Reverse Logistics` pipeline, the order goes back to `Shipped` status through the `Remove From Return` listener transaction.

Finally, if after the return was received it is unreceived and sent back to the customer, the return is placed back into `Return Created` status through the `Unreceive Return` listener transaction.

### 1.2.10.6 Close

Once an order has reached the status of `Shipped`, `Cancelled`, or `Return Received`, it is closed by the `Close Order` transaction. By default, closed orders are not searchable in the Sterling Customer Order Management PCA unless explicitly specified on the search screen.

### 1.2.10.7 Purge

After orders have been in a final status like `Shipped`, `Return Received` or `Cancelled` for a specified time, they are purged, which means that the records for those orders are moved from the regular database tables to the history tables. History orders can be reopened at any time, but are by default not searchable in the Sterling Customer Order Management PCA unless explicitly specified on the search screen.

## 1.2.11 Inventory Visibility and Monitoring

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.

Additionally, it is useful for the retailers to know when their inventory levels fall below specified thresholds so that purchase orders can be placed and supply planned accordingly. The Sterling Customer Order Management PCA provides features to help ensure inventory accuracy.

For more information about Inventory Visibility and Monitoring, see the *Sterling Supply Chain Applications Product Concepts* and the *Sterling Global Inventory Visibility Configuration Guide*.

### 1.2.12 Event Management and Alerts

The Sterling Customer Order Management PCA includes a focused solution for Supply Chain Event Management that leverages the capabilities of the Sterling Customer Order Management PCA Platform (process configuration, event engine, status monitoring) for comprehensive supply chain visibility (orders, inventory, shipment, returns, and so forth) and exception handling.

The Sterling Customer Order Management PCA's Supply Chain Event Management provides fully integrated event configuration, status and event monitoring and alert handling capabilities. It provides 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. 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.

### 1.2.13 Security

Security Management enables you 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.

#### **Users**

A User is an individual assigned a certain title, such as, Hub Administrator or Customer Service Representative (CSR), depending on what role they play in the organization and which tasks they are required to perform. Each organization has its own users.

#### **User Groups**

A User Group is a collection of users who perform similar tasks. For example, a group of Customer Service Representatives might be

collectively placed in a CSR user group. Users can belong to multiple user groups. Permissions are assigned to a user group. A user retains all permissions for each user group to which he or she belongs.

Each organization has its own user groups. User groups can only contain users for the same organization of which the user was created, except in the case of a user group created by the Hub organization, which can contain users of any organization.

### 1.2.14 Returns

The Sterling Customer Order Management PCA Reverse Logistics delivers condition-based returns processing, including execution and management of associated processes, such as exchange orders, refurbishment and repair requests, and return disposition. With chained order capability, Reverse Logistics can link multiple returns or repair requests to original sales orders, providing repair life cycle tracking. It manages reverse inventory tracking back to the appropriate node based upon business rules. It handles return receipts, disposition, and initiates the crediting process.

When a product is damaged during shipment or when after receipt it becomes apparent that the product is malfunctioning, the customer may return it. Several possible scenarios can result themselves from a return:

- A refund could be issued.
- The item could be repaired and shipped back to the customer.
- An exchange could be shipped.

Retailers typically inspect the return to determine whether it is in fact malfunctioning, and if so, whether it can be repaired and re-stocked.

The Sterling Customer Order Management PCA offers a reverse logistics module that can be configured and customized to your business needs.

### 1.2.15 System Administration

The System Management module of the Sterling Customer Order Management PCA, allows you can 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.

The System Management module provides features to administer and monitor various components that make up the Sterling Customer Order Management PCA application. The System Management Console provides a complete picture of the Sterling Customer Order Management PCA application 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.

For more information about system administration, see the *Sterling Supply Chain Applications System Management Guide*.

### 1.2.16 Advanced System Setup

The Sterling Customer Order Management PCA provides some advanced system setups that allow you to configure system-wide elements such as locales and units of measure. These are typically configured once during the start of an implementation.

### 1.2.17 Customizations

The user interfaces within the Sterling Customer Order Management PCA can be customized to meet your specific business needs. Tools are provided to help you make these customizations.

For more information about customizations, see the *Sterling Supply Chain Applications Customization Guide*.

## 1.3 Call Center Features

This section provides visibility to the features introduced by the Sterling Customer Order Management PCA to assist in meeting your business requirements for your Customer Order Management environment. The following features of the Sterling Customer Order Management PCA are explained briefly in this section:

- [Alerts](#)
- [Searches](#)
- [Order Tasks](#)
- [Delivery Tasks](#)
- [Miscellaneous Tasks](#)

- [Frequent Queries](#)

For more information about a specific module, see the *Sterling Customer Order Management PCA User Guide*.

### 1.3.1 Alerts

This section provides information regarding the Alert user interface functionality.

#### **Creating Alerts**

The users can create new alerts in the system and log notes for future reference.

#### **Viewing Alert Information**

The Sterling Customer Order Management PCA provides comprehensive visibility to the alert details. The users can view a list of alerts that are due for follow up, all open alerts that are categorized by alert types, and all queues to which the current user is subscribed.

#### **Searching For Alerts**

When a user needs information regarding alerts that are already created, the user can search for alerts.

#### **Get Next Alert**

The Get Next Alert task provides the capability to assign alerts to the current user.

#### **Close Alert**

Use the Close Alert task to close an alert once follow up has been completed.

#### **Assigning Alerts to a User**

Sometimes an alert needs to be addressed by a particular user. For example, some alerts would require a supervisor to perform the necessary action. Such alerts can be assigned to the supervisors.

### **Notification of Alerts**

The number of open or the priority 1 alerts are notified to the user by displaying it on the CSR Message Panel or in a pop-up depending on the configuration.

### **Moving Alerts to a Queue**

A user can move a particular alert to a different queue.

## **1.3.2 Searches**

The Sterling Customer Order Management PCA supports advanced order and item searches. This helps you to refine the search criteria using additional options available to view more detailed order or item information.

### **Advanced Order Search**

When a customer makes complex inquiries about an order, you can perform an advanced order search to locate the order. The customer order management search also enables you to search draft orders.

### **Advanced Item Search**

When a customer makes complex inquiries about an item, you can perform an advanced item search to locate the item.

## **1.3.3 Order Tasks**

This section briefly explains the tasks that you can perform on an order. To perform any task, you must first search for an order. For more information about searching for an order, see the *Sterling Customer Order Management PCA User Guide*.

### **Cancel Order**

A customer may want to cancel all or a part of an order. You can cancel an order for items that are partially shipped or for items that are not shipped.

## **Initiate Return**

A customer may sometimes want to return or exchange ordered items. In such situations, you can perform the Initiate Return task. This task can be performed for items which are in the shipped status.

## **Add Multiple Items to an Order**

After placing an order, the customer may want to order more of an item or want an additional item. Therefore, you may need to add new order lines or modify the existing ones. The call center management user interface enables you to add multiple items to an order. It enables you to validate items before it is added to an order line depending on the order age or the order status. The customer can also choose to add accessories to an item. The customer can select a required fulfillment option such as shipping, delivery, or pickup options and choose an appointment for the selected items and accessories.

## **Track an Item**

Customers may sometimes need to know the status of their orders. For example, if a customer does not receive items that were ordered, then the customer can inquire about the shipment status.

## **Related Items**

Some items are associated with accessories and are termed as related items. For example, if a television is an item, the remote control is the associated related item for the television.

## **Order Notes**

You can enter notes on an order describing the actions taken on that order for future reference. The notes for an order are either system generated or entered by the user.

## **Increase Order Line Quantity**

A customer may want to increase the quantity of an existing order line. If the inventory exists for the item and the items in the order line are not yet shipped, you can increase the quantity of the order line without adding a new order line.

## 1.3.4 Delivery Tasks

This section provides a brief glimpse into the various delivery tasks supported by the Sterling Customer Order Management PCA.

### **Changing Fulfillment Options**

The Sterling Customer Order Management PCA provides the ability to modify the fulfillment method or the ship-to address for an order placed by a customer. For example, after the customer places an order for delivery, the customer may decide to pick up the items at a nearby store. In such situations, the fulfillment options can be modified as requested by the customer.

### **Changing Delivery Appointment**

This task can be performed if a customer wants to change the date and time of the delivery of an item.

### **Changing Delivery Instructions**

When a customer requests a change in the delivery instructions for an item at the time of delivery, the delivery instructions can be modified for the customer. For example, if the customer is not available at home at the time of delivery, you can modify the delivery instructions as requested by the customer such as, "Please deliver the item at the back door steps".

### **Changing Shipping Address**

This is a very common task. After a customer places an order, you may want to modify the address for a previously existing customer to deliver the items.

### **Reshipping an Item**

Sometimes a customer may report that an ordered item is not received or the received item is damaged. In such situations, the item needs to be reshipped or the customer has to be issued a refund for the shipment. Reshipping is possible for items that are in the shipped or delivered status.

### **Fulfillment Summary**

This task provides a comprehensive visibility into the order details from the time the order is captured until it is fulfilled. The order lines can be grouped together based on their fulfillment methods.

## **1.3.5 Miscellaneous Tasks**

This section briefly explains the miscellaneous tasks that can be performed.

### **Gift Options**

You can set items as gift items if the customer wants to gift it to someone. In such situations, the customer can place an order and either the recipient to whom the gift is sent can pick it up from the store or the item can be shipped to the recipient's residence.

### **Appeasing Customers**

You can perform the Customer Appeasement task whenever a customer is dissatisfied or has had a bad experience with any service provided. For instance, a customer may report problems while placing an order online or report having received a damaged item. In such situations, you can perform the appeasement task based on the order number given by the customer.

### **Price Matching of an Item**

A customer may sometimes discover that the item ordered is available at a lesser price at a different web site. You can look into the customer's claims and perform the necessary action. To perform the price match of an item, you must search for the order.

### **Adding Coupon or Promotion Codes**

You can add a coupon or promotion code to an order upon the request of a customer who has already placed an order. To add a coupon or promotion code for an order, you must search for the order.

### **Changing Payment Method**

A customer may need to change the mode of payment or add a new payment method for an order. To add a new payment method, you must search for the order.

### **Viewing Return and Exchange Details**

Customers may inquire about whether you have received the returned items. You can view the current status of the returned items and inform the customer. Moreover, Customers may inquire about the current status of the exchanged items shipped in for the returned items. You can determine the items that are exchanged and view the status of the exchanged items.

## **1.3.6 Frequent Queries**

This section provides information regarding some frequently asked questions.

### **Where is my shipment?**

Customers may need to know about the status of their orders. For example, if a customer does not receive items that were ordered, they can inquire about the shipment.

### **Why was I charged?**

Customers may inquire about certain amounts an order such as charges, refunds, and payment methods.

To inquire about payment for an order, you must search for the order.

### **Why wasn't I refunded?**

Sometimes a customer may call to inquire about the refunds for an order.

### **How much will I be refunded?**

You can clarify the doubts of the customer regarding the refunds for an order.

### **Have you received my returns?**

A customer may ask some questions regarding the returns for an order.

### **Where are my exchange items?**

Sometimes you may need to clarify doubts of the customer regarding exchange items for an order.

## 1.4 Store Order Management Features

This section provides visibility to features introduced in the Sterling Customer Order Management PCA to assist in meeting your business requirements for your Store Order Management environment.

The following store order management features of the Sterling Customer Order Management PCA are explained briefly in this section:

- [Alerts](#)
- [Searches](#)
- [Order Tasks](#)
- [Delivery Tasks](#)
- [Miscellaneous Tasks](#)
- [Frequent Queries](#)

### 1.4.1 Alerts

This section provides information regarding the Alert user interface functionality.

#### **Creating Alerts**

The users can create new alerts in the system and log notes for future reference.

#### **Viewing Alert Information**

The Sterling Customer Order Management PCA provides comprehensive visibility to the alert details. The users can view a list of alerts that are due for follow up, all open alerts that are categorized by alert types, and all queues to which the current user is subscribed.

#### **Searching For Alerts**

When a user needs information regarding alerts that are already created, the user can search for alerts.

#### **Get Next Alert**

The Get Next Alert task provides the capability to assign alerts to the current user.

### **Close Alert**

Use the Close Alert task to close an alert once follow up has been completed.

### **Assigning Alerts to a User**

Sometimes an alert needs to be addressed by a particular user. For example, some alerts would require a supervisor to perform the necessary action. Such alerts can be assigned to the supervisors.

### **Notification of Alerts**

The number of open or the priority 1 alerts are notified to the user by displaying it on the CSR Message Panel or in a pop-up depending on the configuration.

### **Moving Alerts to a Queue**

A user can move a particular alert to a different queue.

## **1.4.2 Searches**

The store order management search feature support advanced order and item searches. This helps you to refine the search criteria using additional options available to view more detailed order or item information.

### **Advanced Order Search**

When a customer makes complex inquiries about an order, you can perform an advanced order search to locate the order. The store order management search feature also enables you to search draft orders and orders that are created in a store.

### **Advanced Item Search**

When a customer makes complex inquiries about an item, you can perform an advanced item search to locate the item.

## **1.4.3 Order Tasks**

This section briefly explains the various tasks that store personnel can perform on an order.

### **Cancel Order**

A customer may want to cancel all or a part of an order. The items of an order can be cancelled before they are shipped or picked by the customer. The store order management user interface enables you to determine whether or not the items to be cancelled are present in the store.

### **Initiate Return**

A customer may sometimes want to return or exchange ordered items. In such situations, you can perform the Initiate Return task. This task can be performed for items which are in the shipped status.

### **Add Multiple Items to an Order**

After placing an order, the customer may want to order more of an item or want an additional item. Therefore, you may need to add new order lines or modify the existing ones. The store order management user interface enables you to add multiple items to an order. It enables you to validate items before it is added to an order line depending on the order age or the order status. The customer can also choose to add accessories to an item. The customer can select a required fulfillment option such as shipping, delivery, or pickup options and choose an appointment for the selected items and accessories.

### **Track an Item**

Sometimes, customers may need to know the status of their orders. For example, if a customer does not receive items that were ordered, then the customer can inquire about the shipment status.

### **Related Items**

Some items are associated with accessories and are termed as related items. For example, if a television is an item, the remote control is the associated related item for the television.

### **Order Notes**

You can enter notes on an order describing the actions taken on that order for future reference. The notes for an order are either system generated or entered by the user. The store order management user interface allows you to add notes to an order line.

### **Increase Order Line Quantity**

A customer may want to increase the quantity of an existing order line. If the inventory exists for the item and the items in the order line are not yet shipped, you can increase the quantity of the order line without adding a new order line.

### **Creating an Order**

This feature helps you to identify a customer and create an order for the customer. You can enter multiple order lines for an order, modify fulfillment options and appointments, and confirm the payment information as requested by the customer.

### **Creating Store Returns**

Customers may want to return or exchange the ordered items. The Create Store Return task allows you to select items from the order that the customers want to return, enter a return reason, enter exchange items, if applicable, and confirm the payment.

### **Printing an Order**

A customer may visit a store to either place an order or make some modifications to an existing order, which may result in some payment changes. In such situations, a printed order slip of the transaction can be presented to the customer.

## **1.4.4 Delivery Tasks**

This section briefly explains the delivery tasks.

### **Changing Fulfillment Options**

When a customer requests a change in the fulfillment options for an item, you can modify the fulfillment options as requested by the customer. For example, after the customer places an order for delivery, the customer may decide to pick the items at your store. In such situations, you can modify the fulfillment options as requested. The fulfillment options on an order can be modified before they are shipped or picked by the customer. The store order management user interface enables you to determine whether the items for which the fulfillment options are modified, are present in the store. You can also perform this

task when a customer requests to modify the delivery address for an order line.

### **Changing Delivery Instructions**

When a customer requests a change in the delivery instructions for an item at the time of delivery, you can modify the delivery instructions as requested.

### **Changing Delivery Appointments**

When a customer requests a change in the delivery date and time, you can change the delivery appointment.

### **Changing the Shipping Address**

Sometimes, a customer provides incorrect shipping address information when placing an order. In such situations, the customer may request to modify the shipping address.

### **Fulfillment Summary**

This feature provides a comprehensive visibility into the order details from the time the order is captured until it is fulfilled. The order lines can be grouped together based on their fulfillment methods.

## **1.4.5 Miscellaneous Tasks**

This section briefly explains the miscellaneous tasks that can be performed.

### **Changing the price of an Item**

A customer may discover that another retailer is selling the same items that were ordered at a lesser price. In such situations, you may look into the claims of the customer and price match the items, if necessary

### **Adding a Coupon or Promotion Code**

You can add a coupon or promotion code to an order on the request of a customer who has already placed an order. You can add any number of coupons to an order.

### **Appeasing Customers**

When a customer is not satisfied or has had a bad experience with any of the services that were provided, you can present them with the option to appease them. For example, a customer may walk in to a store to report having received a damaged item. In such situations, you need to perform an appeasement task to make amends for the bad experience.

### **Open Box Items**

The open box items are defect items that are returned by the customers. Such items are put on display and sold at a discounted rate.

### **Changing Payment Methods**

A customer may need to change the mode of payment for an order. To change the payment method for an order, you need to first search for the order.

### **Viewing Payment Details**

You can view payment details for an order placed by the customer such as charges, refunds, and payment methods.

### **Viewing Return and Exchange Details**

Customers may inquire about whether you have received the returned items. You can view the current status of the returned items and inform the customer. Moreover, Customers may inquire about the current status of the exchanged items shipped in for the returned items. You can determine the items that are exchanged and view the status of the exchanged items.

## **1.4.6 Frequent Queries**

This section explains the different queries that customer tend to inquire regarding the status of their orders.

### **Where is my shipment?**

Customers may inquire about the status of their orders. For example, if a customer does not receive items that were ordered, then the customer may call you to inquire about the shipment.

**Why was I charged?**

Customers may inquire about the charges made against their orders. And can ask for the information regarding charges, refunds, and payment methods.

**Why wasn't I refunded?**

Sometimes customers expect refunds for returned items. If the customer does not receive a refund, they may call to inquire about the refund. You need to clarify why they were not refundable for the returned items.

**How much will I be refunded?**

Customers may inquire about the refundable amount for the returned items. You can view the refund details for the returned items and inform the customer about the refundable amount for the returned items.

**Have you received my returns?**

Customers may inquire about whether you have received the returned items. You can view the current status of the returned items and inform the customer.

**Where are my exchange items?**

Customers may inquire about the current status of the exchanged items shipped in for the returned items. You can determine the items that are exchanged and view the status of the exchanged items.

## 1.4.7 Managing Users

User security enables a store administrator to ensure that users have access to information that is appropriate for carrying out their tasks. Users can access only those system resources for which they have permissions. A store administrator can search for users, assign user groups, or transfer a user to another store.

**Users**

A user is an individual who can perform certain tasks depending on what role the user plays in the organization. Each organization has its own users. The Sterling Customer Order Management PCA does not allow users to manage their own credentials.

### **User Groups**

A user group is a collection of users who perform a similar task. For example, a group of store associates may be collectively placed under a store associate user group. A single user can belong to multiple user groups. Each user group has a set of assigned permissions. If a user belongs to multiple user groups, the user retains the permissions set for all user groups.

## A

---

actions, 17  
ATP (Available To Promise) rules  
  definition, 5

## B

---

base process types, 12

## C

---

capacity, 8  
catalogs, 8  
conditions, 16

## D

---

delivery services  
  definition, 7  
distribution groups  
  definition, 5

## E

---

environment variable  
  YANTRA\_HOME, xii  
  YFS\_HOME, xii  
events, 16, 17  
externally-triggered transactions, 15

## N

---

nodes  
  definition, 4

## P

---

participants, 23  
pipelines, 16  
  process types, 12  
process type pipelines, 12  
promising, 4  
provided services  
  definition, 7

## R

---

repositories, 11

## S

---

scheduling  
  definition, 5  
scheduling rules  
  definition, 6  
security management, 22  
sourcing rules  
  definition, 6  
statuses, 16  
  drop statuses, 17  
  pick up statuses, 17

## T

---

tasks

- CSR, 1

time-triggered transactions, 16

transactions, 15

- externally-triggered, 15

- time-triggered, 16

- user-triggered, 16

## U

---

user groups, 22

users, 22

user-triggered transactions, 16

## Y

---

YANTRA\_HOME, xii

YFS\_HOME, xii