

IBM Sterling Order Management V9.2.1 Overview

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Agenda

- Functional Enhancement
- Technical Enhancements
- Performance Enhancements
- Optional License Options

Continuous Order Management Investments

Release 8.5	Release 9.0	Release 9.1	Release 9.2
<ul style="list-style-type: none"> - Multi-enterprise architecture enhancements - New Business Intelligence capabilities - New Business Administration application - Enhancements to the following capabilities to support B2B order processes <ul style="list-style-type: none"> - Customer - Order management - Sourcing and inventory - Payment 	<ul style="list-style-type: none"> - Secure data capture server and PA-DSS certification - Product/Service Configurator in Common Platform - New quoting processes/capabilities and new field sales user experience - New eCommerce user interface 	<ul style="list-style-type: none"> - WebSphere Commerce integration - Multiple Inventory Items for a Selling Item - Multi-hop Purchase and Transfer Orders - Real-Time Availability Monitor Matrix - Reverse Authorization and Settlement Match - Transfer Cost Enhancement - Cost Minimization Sourcing Rules - Establish Pricing Rules for Provided Services - Quoting in Call Center and Store - Quoting Analytics 	<ul style="list-style-type: none"> - WebSphere Commerce integration - Store based Fulfillment <ul style="list-style-type: none"> - Ship from Store - Node Capacity - Business Intelligence <ul style="list-style-type: none"> - Returns Dashboard - Ad-hoc Reporting - CPQ enhancements <ul style="list-style-type: none"> - Configurator Enhancements - Quoting Enhancements

2009

2010

2011

2012

IBM Selling & Fulfillment Strategic Focus Areas

**Enable
Omni-Channel
Selling
Anytime &
Anywhere**

**Deliver
Omni-Channel
Promising and
Order
Fulfillment**

**Improve
Customer
Intimacy and
Personalization
through
Context**

**Empower
Business Users
and Reduce IT
Involvement**

**Provide
Technical and
Performance
Leadership**

Delivering true Omni-channel Commerce at the POS

- ✓ Enables the store to fully participate in omni-channel commerce, by converging Commerce and POS into a seamless omni-channel store experience
- ✓ Improves customer service and satisfaction by providing an enterprise-wide view of customer orders both online and POS
- ✓ Provides significant functional enhancements for pricing, promotions and returns

- ✓ Enabling “endless Aisle” and “save the sale” functionality at the Point of Sale

- ✓ Enterprise Add-On provides unparalleled performance and scalability

**Enable
Omni-Channel
Commerce
Anytime &
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**Deliver
Omni-Channel
Promising and
Order Fulfillment**

**Provide Technical
and Performance
Leadership**

Executing the Vision for Point-of-Commerce

Addressing the **Evolving Retail Store**

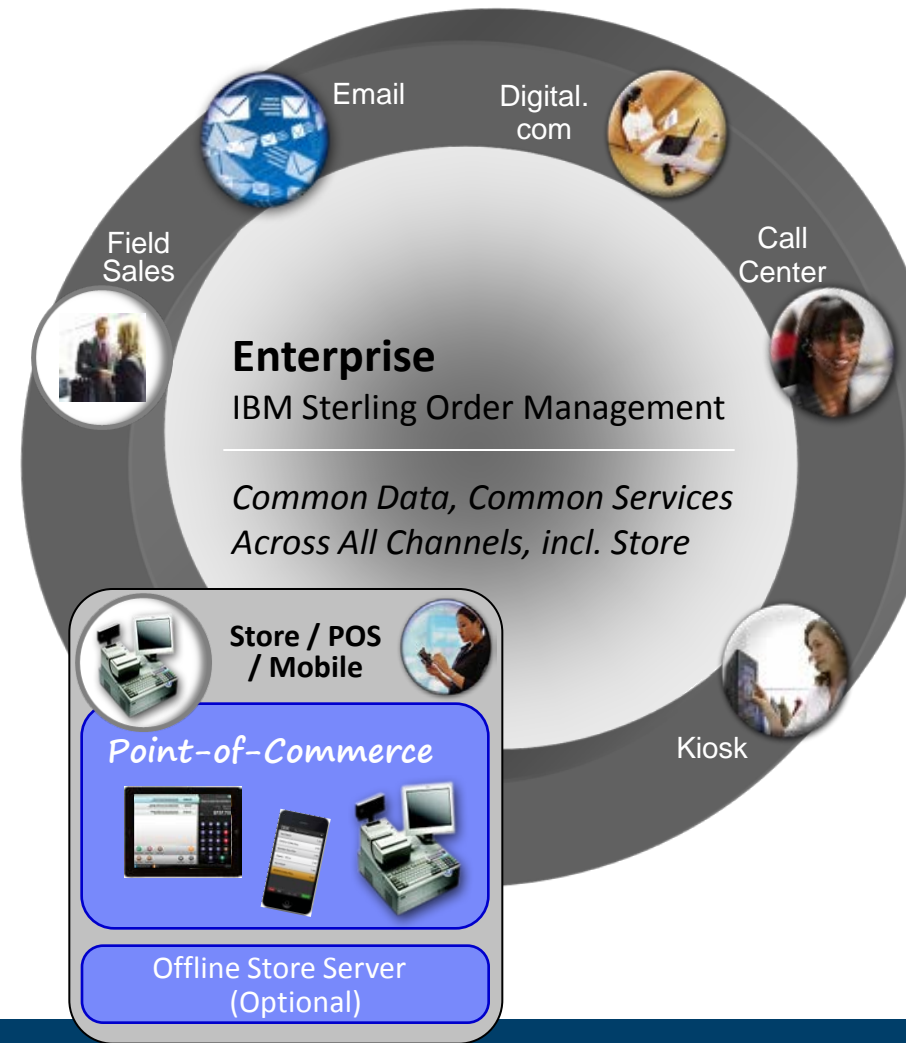
- Flexible clients, optimizing how the web-based client can be configured to run on various devices from POS to Tablets to Smartphones.
- Flexible deployment, optimizing 'thin client' and 'thin store' deployment options that allow retailers to manage how to deployed IT while balancing need for mission-critical availability.

Addressing the **Empowered Consumer**

- Full and flexible function, enabling associates to execute traditional POS functions, plus a full suite of store-to-store and cross-channel scenarios at checkout to improve consumer satisfaction; while ensuring an extensibility model that allows you to manage your retailer unique requirements as needed.

Addressing **Optimizing IT Investment**

- Common data and common services as the foundation for sustainable IT costs and reduced IT complexity – based on IBM Sterling Order Management – easing pressure on IT staff across channels and allowing focus on other high-value priorities.



Order Management Enhancements for POS Scenarios

- Pricing and Promotions
- Payment Processing
- Returns
- Manager Overrides
- Taxation
- Loyalty Program Integration



Pricing and Promotions

- Provide a way for stores to implement innovative pricing and promotions strategies. Examples:
 - Store and Region based pricing
 - Define effective dates, days, and time for coupon and pricing rules based on time zone.
 - Lowest item price search

The screenshot displays the IBM Business Center interface for configuring a pricing rule. The page title is "Pricing Rule Summary" and the rule ID is "OT1". The rule description is "OT1 - OT>10, get \$2 off". The rule is currently "ACTIVE".

The "Conditions" tab is selected, showing the following configuration:

- Apply to order that meets the following criteria:** The adjustment will be applied if the order total is equal to or greater than the order total specified below.
- Order Total:** \$ 10.000000
- Set up adjustments:** Adjustment Type: Absolute discount, Adjustment: 2.000000
- Apply adjustments to:** Order Currency: US Dollar, Payment Type: [Dropdown]
- Analytics:** Discount Charge Name: E1_Discount

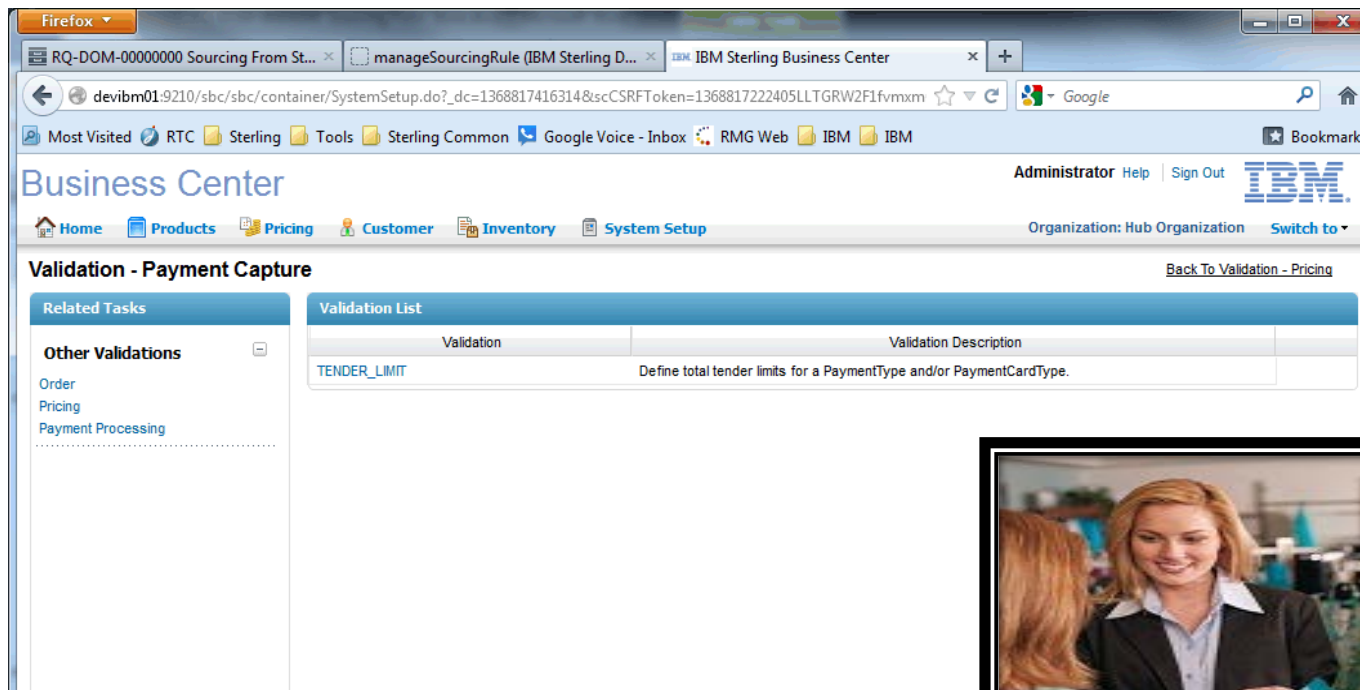
The "Schedule" tab is also visible, showing the following configuration:

- Pricing Rule will be valid on days which are selected below:** All Days, Valid On Sunday, Valid On Monday, Valid On Tuesday, Valid On Wednesday, Valid On Thursday, Valid On Friday, Valid On Saturday.
- Time of the day when the Pricing Rule will be active:** Start Time: [Dropdown], End Time: [Dropdown]

The "Schedule" tab is circled in red, and an arrow points to the "Pricing Rule will be valid on days which are selected below" section.

Payment Processing

- More choices for payment scenarios for POS. For example:
 - Debit card handling
 - Payment rules for cash and carry
 - Payments for cross channel ordering at POS



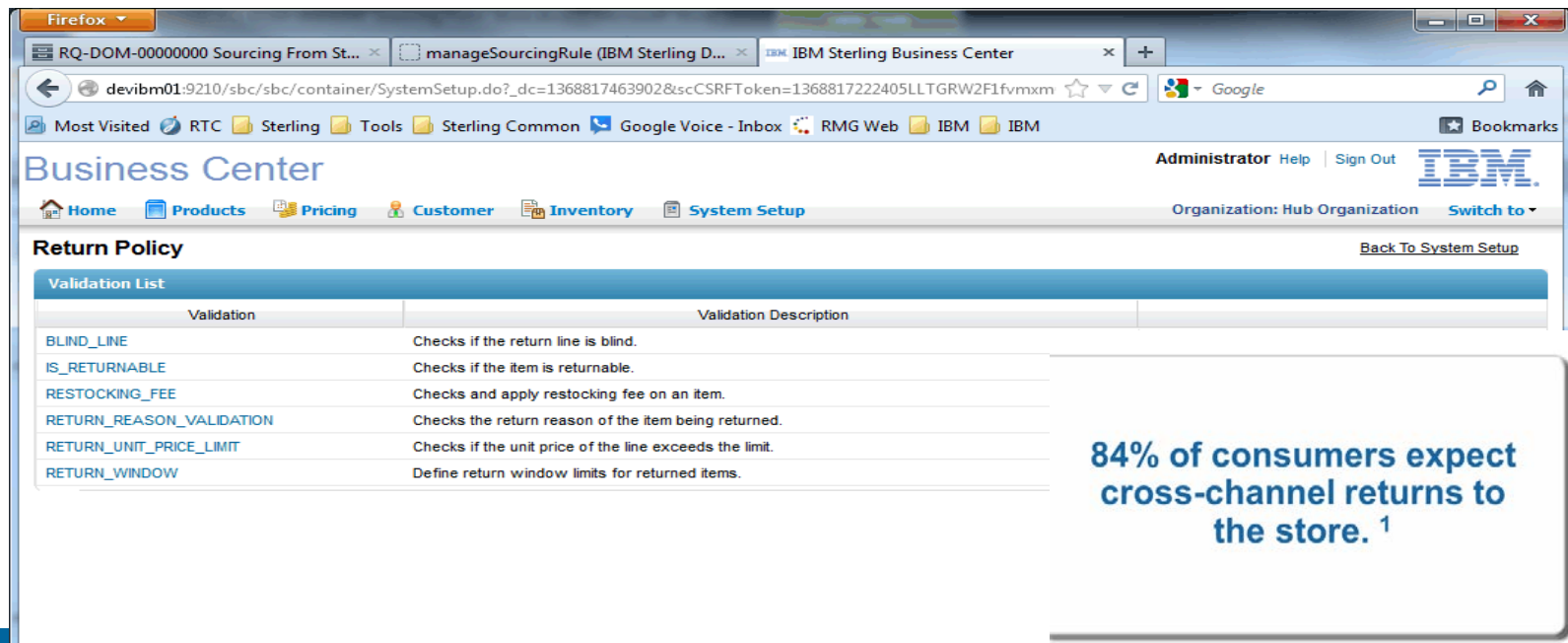
The screenshot shows the IBM Sterling Business Center web application interface. The browser window is Firefox, displaying the URL: `devibm01.9210/sbc/sbc/container/SystemSetup.do?_dc=1368817416314&scCSRFToken=1368817222405LLTGRW2F1fvmxm`. The page title is "Business Center" and the user is logged in as "Administrator". The navigation menu includes "Home", "Products", "Pricing", "Customer", "Inventory", and "System Setup". The current page is "Validation - Payment Capture", with a "Back To Validation - Pricing" link. A "Related Tasks" sidebar on the left lists "Order", "Pricing", and "Payment Processing". The main content area shows a "Validation List" table with the following data:

Validation	Validation Description
TENDER_LIMIT	Define total tender limits for a PaymentType and/or PaymentCardType.



Returns Enhancements

- **Implement fair and consistent return policies**
 - Define and maintain return policies
 - Re-pricing of returns including promotions
 - Allow blind returns with item's lowest price
 - Smart matching for return receipts
 - Easy returns for cross channel orders



The screenshot shows the IBM Sterling Business Center interface. The browser window title is "IBM Sterling Business Center". The URL is "devibm01:9210/sbc/sbc/container/SystemSetup.do?...". The page header includes "Business Center" and "Administrator Help | Sign Out". The main navigation bar has "Home", "Products", "Pricing", "Customer", "Inventory", and "System Setup". The "Return Policy" section is active, showing a "Validation List" table with the following data:

Validation	Validation Description
BLIND_LINE	Checks if the return line is blind.
IS_RETURNABLE	Checks if the item is returnable.
RESTOCKING_FEE	Checks and apply restocking fee on an item.
RETURN_REASON_VALIDATION	Checks the return reason of the item being returned.
RETURN_UNIT_PRICE_LIMIT	Checks if the unit price of the line exceeds the limit.
RETURN_WINDOW	Define return window limits for returned items.

84% of consumers expect cross-channel returns to the store. ¹

Manager Overrides

- Flexible framework to define validations for coupons and discounts and provide conditions under which the manager approval is mandatory for an override.
- Individual modules will use this framework
 - Off-line payment tender limits
 - Exceeded number of coupons per transaction
 - Item not on file

The screenshot shows the IBM Sterling Business Center interface. The main content area is titled 'Validation - Payment Processing' and contains a 'Validation List' table. The table has two columns: 'Validation' and 'Validation Description'. The first row is 'CALL_FOR_AUTHORIZATION' with the description 'Validates that a manager has confirmed the called authorization code was entered properly.' The second row is 'OFFLINE_LIMIT' with the description 'Checks if the total amount of offline transactions exceed the limit.' The 'OFFLINE_LIMIT' row is highlighted in blue. On the left side, there is a 'Related Tasks' sidebar with 'Other Validations' and a list of tasks: 'Order', 'Pricing', and 'Payment Capture'. The top navigation bar includes 'Home', 'Products', 'Pricing', 'Customer', 'Inventory', and 'System Setup'. The IBM logo and 'Administrator Help | Sign Out' are visible in the top right corner.

Validation	Validation Description
CALL_FOR_AUTHORIZATION	Validates that a manager has confirmed the called authorization code was entered properly.
OFFLINE_LIMIT	Checks if the total amount of offline transactions exceed the limit.

Order Management Enhancements

- Loyalty Programs Integration
 - Record participation in a Loyalty program
 - Call out to Loyalty management system at key touch points
- Taxation
 - Miscellaneous enhancements to identify charge groups as taxable
- Cross-Channel in the store
 - Buy online, return in store
 - Buy online, modify in store
 - Endless aisle in store (Cash and Carry and Ship To Home in the same transaction)
 - Alternate store pickup

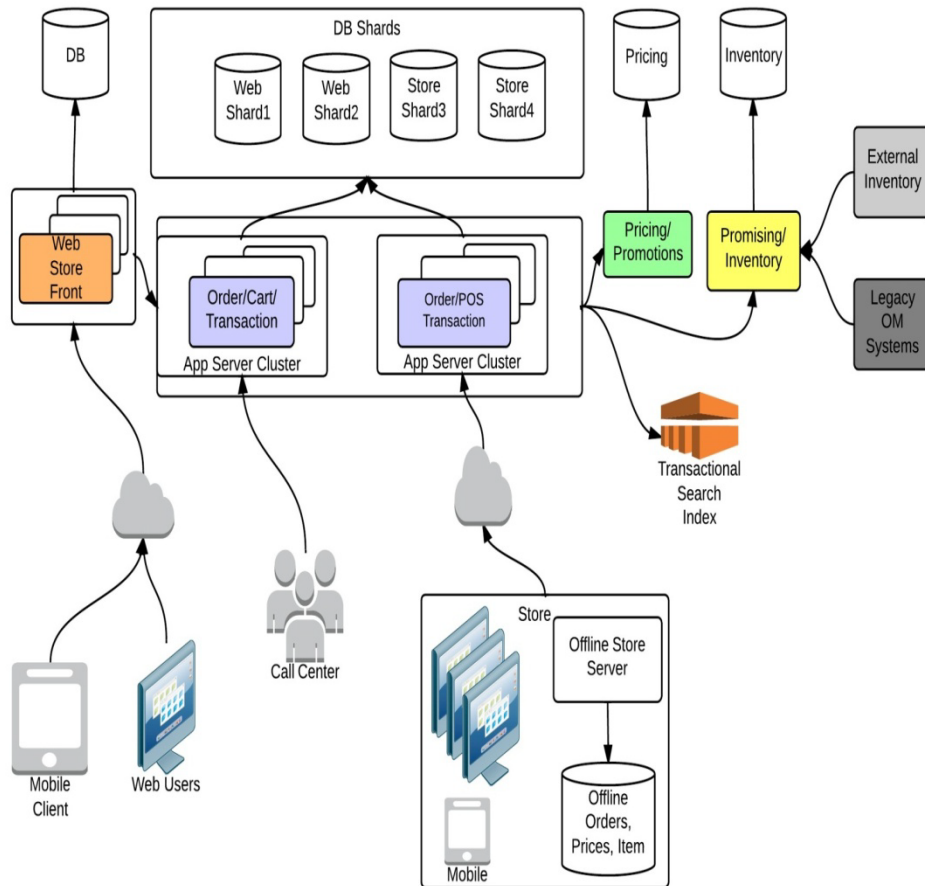


Store Based Pricing for Sterling Store

- Flexibility and predictability for store licensing model
 - New way to licensing Sterling Store – by size of store
 - Flexibility to switch between device formats



Enterprise and Advanced Add-on



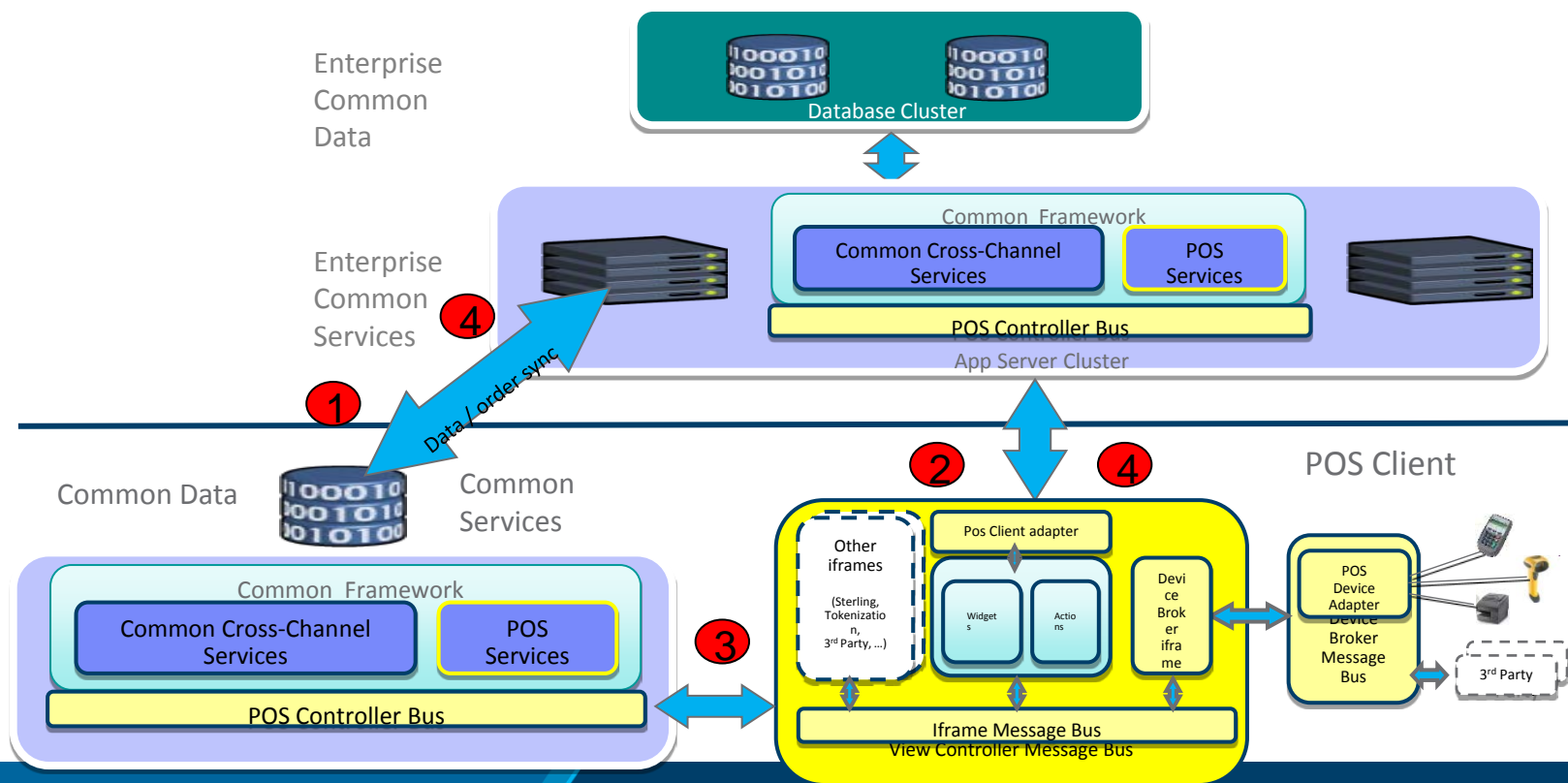
Innovative design that understands and exploit sharding technologies

- Separate inventory and promising from order execution to enable each to scale separately
- Allows sharding by enterprise as well as within enterprise
- Prepares you for exponential omni-channel volumes
- Enables alternative business models like marketplaces

Data Sync Architecture

Tool for synchronizing information and data for offline scenarios

- Communication between corporate servers and store backup servers
- Continuity of operations at the store
- Intuitive interface for business user



Configuring Data Sync

Business Center

Home Products Pricing Customer Inventory System Setup

Home

Dashboard

Reset Dashboard

My Change Projects

New Change Project Search

Name	Status
No records to display	

My Change Requests

Name	Change Project	Status
No records to display		

Data Synchronization

Sync Profile
New Profile | Find Profile

Sync Target
New Target | Find Target

Sync Subscription
New Subscription | Find Subscription

Ease of Upgrade

- Incremental Capabilities
- Backward Compatibility
- Schema changes non-intrusive

What are the IBM Early Access Programs?

▪ Objective of Early Design Program

- *Benefit to customer – provide their requirements to PM and Development on the new functionality*

Show screen mock-ups and eventually demos of the new or enhanced features of the upcoming release to obtain their input on design

Prioritize the customer input to determine what can be included in this release and what input needs to be deferred to the next release

▪ Objective of Beta Program

- *Benefit to customer – focused “hands on testing” with the new/enhanced capabilities and online forum to exchange input and experiences.*

Provide software to the beta testers for testing of the new or enhanced capability.

Beta testers can determine which functionality they want to test.

With beta id access, will have access to the beta software and the forum to provide input, questions and issues. .

Regular scheduled communication meetings



External Information on Sterling Order Management V9.2.1

- The [Sterling Selling and Fulfillment Suite Information Center](#) has been updated - see the topic "Sterling Order Management - What's new"
 - This release extends IBM Smarter Commerce™ capabilities with pricing, payments, and returns enhancements, as well as with prebuilt integration to point-of-sale solutions, such as Toshiba® TCxGravity™ , which will be particularly important to retail clients.
- The Order Management and Configure Price Quote installation process includes license acceptance for an update to the V9.2.1 license agreement. This license agreement (OM: L-MROA-94VKZ5, CPQ: L-MROA-94TK4B) can be viewed on the IBM Software License Agreements site - <http://www-03.ibm.com/software/sla/sladb.nsf/> - at the following links
 - [IBM Sterling Order Management](#)
 - [IBM Sterling Configure Price Quote](#)
- Announcement letter: IBM United States Software Announcement dated May 21, 2013:
- [IBM Sterling Selling and Fulfillment Suite V9.2.1 enhancements help enterprises expand the omni-channel customer experience and accelerate business operations with improved integration and business user tools](#)

Internal Information on Sterling Order Management V9.2.1

For download from the internal [Software Sellers Workplace Software Downloads](#) site look for the part numbers:

- IBM Sterling Order Management (7 eAssemblies) - Search for
 - Brand: Other Software
 - Family name: Sterling OM SVP PSP
 - Date posted: Within past 1 month

- IBM Sterling Configure Price Quote (3 eAssemblies) - Search for
 - Brand: Other Software
 - Family name: Sterling CPQ SVP PSP
 - Date posted: Within past 1 month

END