

IBM Sterling Order Management

What's new in 9.2 release

Anand Narayanaswami, Product Manager
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9.2 Release Focus

- WebSphere Commerce / Order Management Integration
- Extend Core Competencies
 - OM Features
 - Store Features
 - CPQ Features
 - Business Intelligence
- Technical / Platform Enhancements
- Reconciliation of Customer Enhancements

Feature Highlights

WC/OM/CPQ side-by-side integration for B2C

- Integration between WebSphere Commerce and Sterling platforms in areas such as Inventory Management, Order Fulfillment, Pricing and Promotions.
- Enables cross-sell of OM into WC customer base with reduced TCO to implement and Supports CaaS with integrated footprint

Store-based Fulfillment

- Enhances the capability of a Store as a fulfillment center thereby matching customer demand with excess and slow moving supply on store shelves

Node Capacity

- Sources from the most optimal node until it reaches its configured capacity for the day and then sources from other nodes

Payment Features

- Support for partial authorization reversal reduces transactions costs associated with payment gateway
- Reconciliation of enhancements to Charge Transaction Request around authorization reversals and payment settlement.

Feature Highlights (Contd.)

CPQ

- Improved performance and UI for Sterling Configurator
- Support for multiple quote approval plans

Business Intelligence

- Cognos Upgrade to 10.0.1
- New BI reports related to Returns
- Capabilities for ad-hoc data analysis reports

Tech Stack and Platform Enhancements

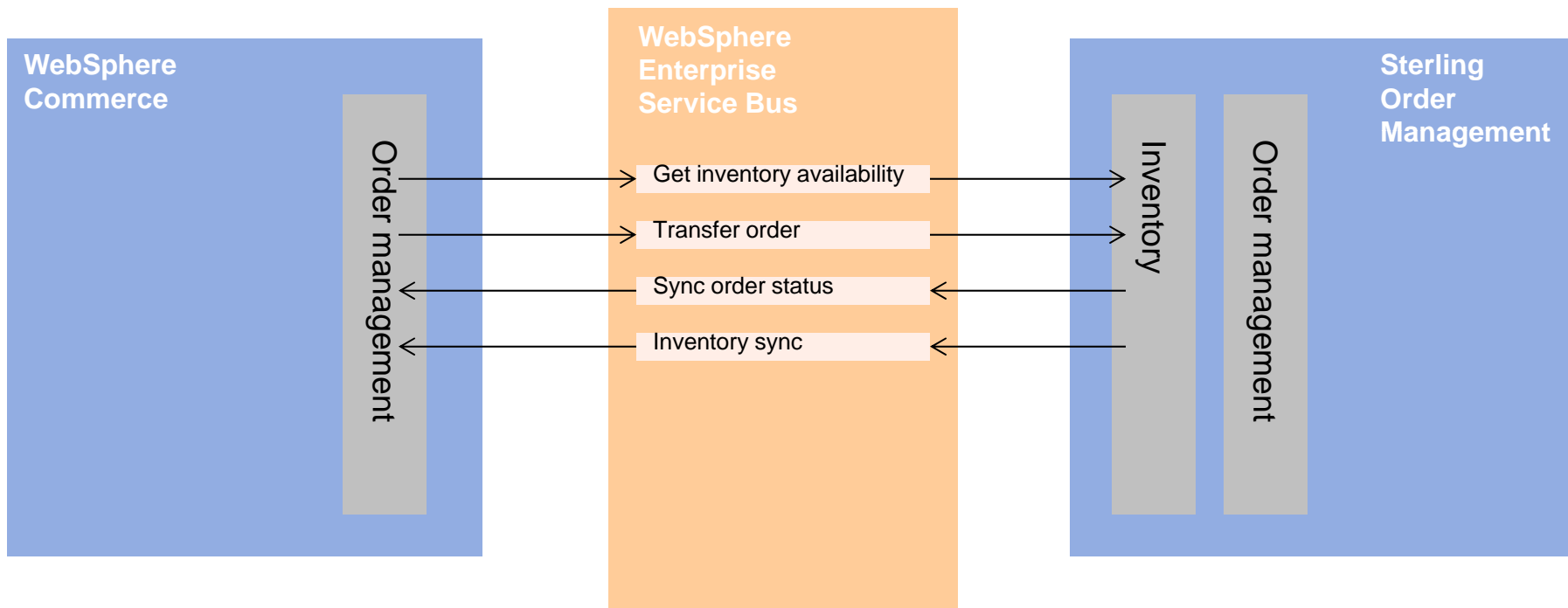
- Technology Stack certifications and platform enhancements to support current market needs and to improve performance

WEBSPHERE COMMERCE - ORDER MANAGEMENT INTEGRATION

Integration Scenarios: WebSphere Commerce FEP3 + Sterling Order Management in 9.1

Key integrations delivered:

- Inventory/Promising
- Asynchronous Order placement and Status updates

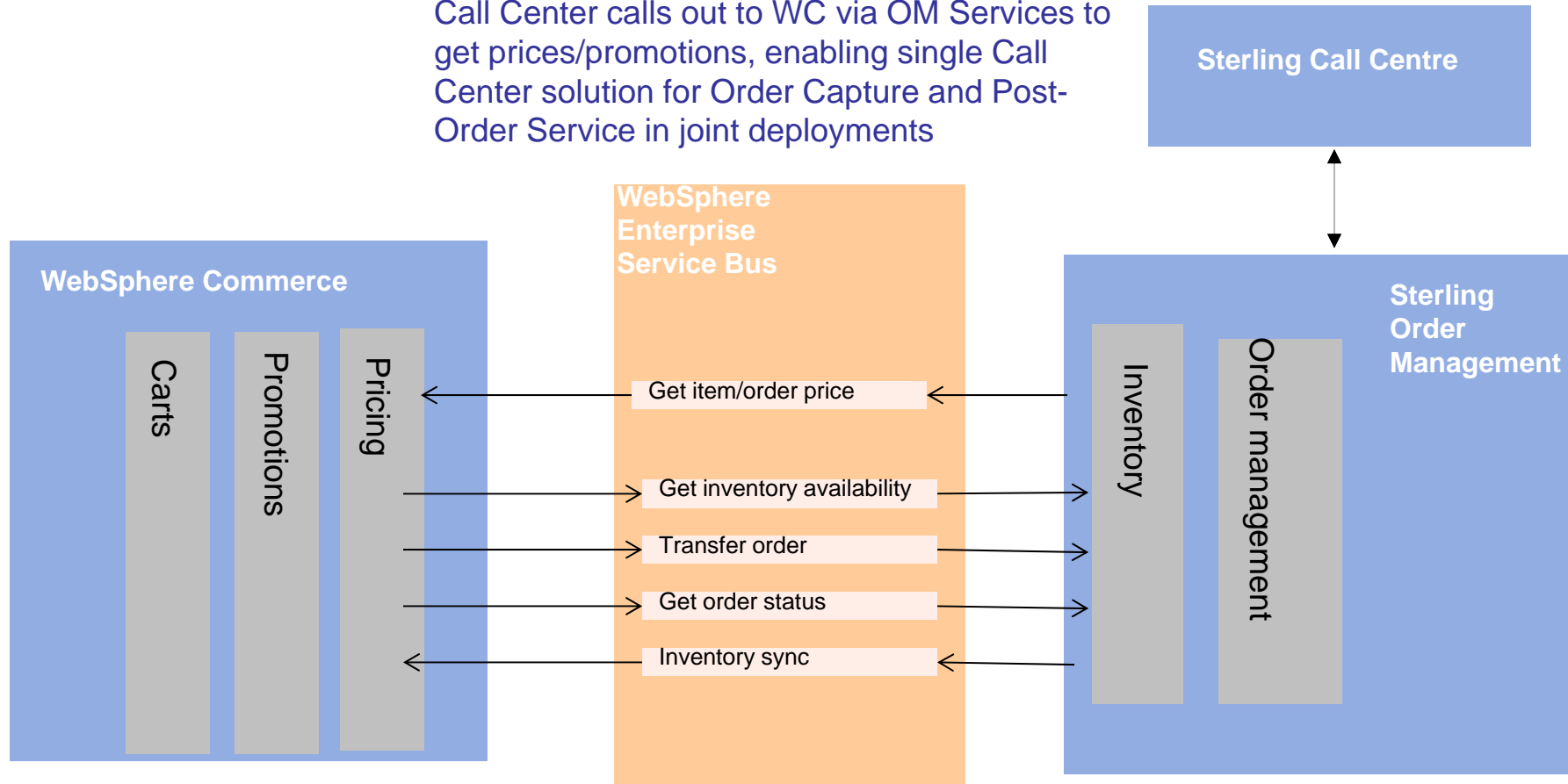


Phase 2: WC – OM Integration

- Delivered in Q2 2012 as part of Gemini 9.2 and WC FEP5
- Primary area of focus around Pricing/Promotions
- In Scope for FEP5 / Gemini
 - Pricing/Promotions integration
 - Call Center order capture enabled for joint deployments with pricing integration
 - Order rationalization in joint deployments
 - Advanced inventory scenarios

Integration Scenarios: WebSphere Commerce FEP5 + Sterling Order Management in 9.2

Call Center calls out to WC via OM Services to get prices/promotions, enabling single Call Center solution for Order Capture and Post-Order Service in joint deployments



Inventory Management in a side-by-side Integration

- OM will be the system of record for inventory and promising
 - Inventory processing, availability computation and sourcing logic will be performed in OM
- OM will maintain inventory cache for Web and Mobile channel
- OM Real-time Availability Monitor (RTAM) is used to refresh the WC inventory cache
 - Real-time inventory availability calls will be made from WC to OM if WC inventory cache entry is not found or expired.
- WC calls OM in real-time for availability for Store pick-up
- Inventory reservations and cancellations, from WC are done directly via API calls to OM

Inventory Availability from Web Store

(WC calls OM to check inventory availability)

The screenshot displays the MADISONS web store interface. At the top, there is a search bar and navigation links for Home, Shopping Cart, My Account, Order Status, and Advanced Search. Below this is a category navigation bar with options for Furniture, Tableware, Kitchenware, and Apparel. The main content area shows the product page for a "5-Piece Everyday Silverware Set" priced at \$14.99. A quantity selector is set to 1, and there is an "Add to Cart" button. Below the "Add to Cart" button are "Add to Compare" and "Add to Wish List" buttons. A red circle highlights the "Check Store Availability" section, which displays the following information:

- Check Store Availability**
- Online Availability:**
 - In Stock
- In-Store Availability:**
 - Batnurs Plaza In Stock
 - Bloor Plaza Out of Stock
 - Borough Plaza Out of Stock
- [Change Store](#)

Cart / Order – Rationalization of Order Entity

- Order functionality will be managed by OM
- Once a cart is confirmed in WC, WC will make a call to OM to create a corresponding Order for the cart
- Order fulfillment will occur in OM
- WC will call OM to obtain order information to be displayed on storefront when needed
- Sterling Call Center uses OM cart, not WC cart to place order
 - Ability to pull cart from WC into Sterling Call Center not yet enabled OOTB, but can be in the field

Order Capture

(WC creates the shopping cart)

The screenshot shows the MADISONS website's shopping cart interface. At the top, there is a navigation bar with the MADISONS logo, a search box, and links for Home, Shopping Cart, My Account, Order Status, and Advanced Search. Below this is a category bar with Furniture, Tableware, Kitchenware, and Apparel. The main heading is 'Shopping Cart'. A red circle highlights the 'Shop Online' radio button, which is selected, next to the 'Pick Up at Store' option. The cart table lists one product: '5-Piece Everyday Silverware Set' (SKU: TASI-0201) with an availability of 'In-Stock', a quantity of 1, and a price of \$14.99. Below the table, there is a 'Promotional code' field with an 'Apply' button. The order summary shows an Order Subtotal of \$14.99, a Discount of \$0.00, and an Order Total of \$14.99. A 'Checkout' button is located at the bottom left of the cart area. On the right side, there is a 'Recommendations' section with a user profile picture and several product thumbnails.

PRODUCT	AVAILABILITY	QTY	EACH	TOTAL
5-Piece Everyday Silverware Set SKU: TASI-0201 Remove Move to Wish List	In-Stock	1	\$14.99	\$14.99

Promotional code: [Apply](#)

Order Subtotal: \$14.99
Discount: \$0.00
Order Total: \$14.99

[Checkout](#)

Order Capture

(WC cart converted to an Order in OM)

MADISONS Search

Home | Shopping Cart | My Account | Order Status | Advanced Search | Store Locator | Sign

Furniture Tableware Kitchenware Apparel Cart: 0 item(s) subtotal: \$0.00

Thank you for your order! [Continue Shopping](#)


You will receive a confirmation by e-mail to verify your order.
Order number: 20003
Order date: December 6, 2011

Shipping Information

Shipping Address:
Bathurst Plaza Bathurst Plaza
781 Bathurst St
Toronto Ontario
Canada M6G 1B4
admin@madisons.ca

Ship as Complete: Yes

Shipping Method: Pickup in store.

Product	Availability	Status	Qty	Each	Total
 5-Piece Everyday Silverware Set SKU: TASI-0201	In-Stock	Pending payment approval	1	\$14.99	\$14.99

Order Subtotal: \$14.99
Discount: \$0.00
Tax: \$0.00
Shipping: \$0.00
Shipping Tax: \$0.00
Order Total: \$14.99

Billing Information

BILLING ADDRESS
laura Apostoloiu
8200 Warden Ave
Markham Ontario
Canada L6G 1C7

BILLING METHOD:
Pay In Store

Amount: \$14.99

Order Details

(WC call OM for Order details)

Search

Home | Shopping Cart | My Account | Order Status | Advanced Search | Store Locator |
Cart: 0 item(s) subtotal

Furniture Tableware Kitchenware Apparel

My Account

- Settings
- Personal Information
- My Address Book
- Quick Checkout Profile
- Wish Lists
- Personal Wish List
- My Orders
- My Orders
- My Coupons
- My Coupons

Order Details

Order Number: 20003
Order Date: December 6, 2011

Shipping Information

Shipping Address: Bathurst Plaza
 Bathurst Plaza
 781 Bathurst St
 Toronto Ontario
 Canada M6G 1B4
 admin@madisons.ca

Ship as Complete: Yes

Shipping Method:
 Pickup in store

Product	Requested Shipping Date	Availability	Status	Qty	Each
 5-Piece Everyday Silverware Set SKU: TASI-0201		In-Stock	Pending payment approval	1	\$14.99

Order Subtotal:

Discount Adjustments:

Tax:

Shipping:

Shipping Tax:

Order Total:

14
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Pricing and Promotions

- OM pricing module will be turned off and the WC pricing/promotions module will be used in a side-by-side scenario
- OM calls WC pricing/promotions service during order placement via Call Center to ensure consistent cross-channel pricing
 - OM user exits implemented to call WC pricing/promotions
- WC management center UI will be used to manage the price rule and price lists and entries.
- During returns OM calls WC pricing/promotions to perform promotion evaluation and return the price adjustments
- Pricing integration enables use of Sterling Call Center as the Call Center solution in joint deployments for both order capture and post-order service

Sterling OM/Call Center Leverages WC Pricing/ Promotions

The screenshot shows the 'Create Order: Add Items' interface in Sterling Call Center. The window title is 'Sterling Call Center - Trace is On [ALL]'. The user is Barbara Marshall, and the order is for Beverly Jones. The interface includes a 'Tasks' pane on the left with options like 'Copy Draft Order', 'Send Order E-mail', and 'Search'. The main area displays a table of items to be added to the order. A red circle highlights the 'Override Price' link for the first item, 'Tierra 42" Plasma Television/HDTV'. The table has columns for Item, Quantity, UOM, Unit Price, Fulfillment Method, Line Total, and a 'Line Total' column. The 'Override Price' link is highlighted in blue.

Item	Quantity	UOM	Unit Price	Fulfillment Method	Line Total	
100001 Tierra 42" Plasma Television/HDTV	1.00	Each	\$749.99	Each	\$749.99	Override Price
100002 Alpha 890 Advanced Universal Remote	1.00	Each	\$10.00	Each	\$10.00	Override Price

Subtotal: \$759.99

Steps: Customer Identification (checked), Add Items (active), Choose Fulfillment, Fulfillment Summary, Enter Payment.



OM FEATURES

Fulfillment Node Capacity for Optimal Sourcing

Feature Overview

- When there are multiple nodes (Store / DC / Drop ship Vendor) to fulfill an order – Source from optimal node ONLY until it reaches its quota of units (pick pack ship) for the day and then source from the other node(s)

Capabilities

- Ability to define the number of units to be released to a node in a day
- Once node capacity reached, use the next DC / store in the sourcing rule
- Node Inventory still used for ATP/ scheduling, just not released to the node if quota reached
- Ability for business users / store managers to mark a Node as “ineligible” for a day to prevent orders from being sent to that node

Benefits

- More accurate order promising
- Improve customer experience by avoiding potential order delays due to node overload
- Reduces operational costs by avoiding idling workforce

Node Capacity Configuration via SBC

The screenshot displays the IBM Sterling Business Center (SBC) web interface in Internet Explorer. The browser address bar shows the URL: `http://devibm01:9200/sbc/sbc/container/inventory/manageNodeCapacity.do?scCSRFToken=7syWPWpl`. The page title is "Business Center" and the user is logged in as "Administrator".

The main content area shows the "Node Capacity" configuration page for "Node: defnode". A green notification banner at the top states: "Weekly Capacity was saved successfully." Below this, the "Weekly Capacity" table is displayed for the period 04/22/2012-04/28/2012.

	Sunday (04/22)	Monday (04/23)	Tuesday (04/24)	Wednesday (04/25)	Thursday (04/26)	Friday (04/27)	Saturday (04/28)
Standard	1,000.0000	1,000.0000	1,000.0000	1,000.0000	200.0000 *	1,000.0000	1,000.00
Consumption	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.00
Availability	1,000.0000	1,000.0000	1,000.0000	1,000.0000	200.0000	1,000.0000	1,000.00

The table uses color coding: grey for "Past Date", yellow for "Today", and red asterisks for "Overriden Capacity". The Thursday (04/26) column is highlighted in yellow, indicating it is the current date. The Thursday "Standard" value is marked with a red asterisk, indicating it is an overridden capacity.

Below the table is a "Legend" section:

- Non Working Day (Blue square)
- Past Date (Grey square)
- Today (Yellow square)
- Overriden Capacity (Red asterisk)

Node Capacity Configuration via Applications Manager

"Consider Only Those Nodes That Have A Minimum Available Capacity Of X % Within The Next Y Day(s)"

The screenshot shows the 'Applications Manager' window with the 'Sourced From Details' tab selected. The window contains several configuration fields and checkboxes. A red box highlights the option: Consider Only Those Nodes That Have A Minimum Available Capacity Of 0 % Within The Next 0 Day(s). Other visible options include 'Substitution Is Allowed', 'Expand to next sourcing sequence to minimize number of shipments', 'Consider only those nodes that are Within 0.00 Radius', 'Procure/Transfer to this Node when inventory is not available', and 'Work Order Creation Is Allowed'. Below the highlighted option, there are radio buttons for 'All Inventory', 'Inventory that will be available in the next 0 day(s)', and 'Only Onhand Inventory'. At the bottom, there is a 'Source From' text area.

Partial Reversal of Authorization

Feature Overview

- Previously reversal was supported for complete authorization amount. With this release, reversal of partial amounts are possible

Capabilities

- Flexibility to reverse authorization for partial amounts rather than the full authorization which would require an additional re-authorization
- Configurable feature. Default setting won't support partial reversal and is for backward compatibility

Benefits:

- Reduce transactional costs due to reduced number of calls to payment gateway

Partial Auth Reversal Example

Scenario: Available open Authorization for \$100, need to settle invoice for \$60

Full Reversal	Partial Reversal
Reverse \$100	Reverse \$40
Authorize \$60	
Charge \$60	Charge \$60
Total transactions: 3	Total transactions: 2

Partial Reversal Configuration

Payment Card Type Details

Payment Card Type

Payment Type: CREDIT_CARD

Payment Card Type ID: VISA

Short Description: Visa

Long Description: Visa

Authorization Reversal Strategy: Reverse When Expired

Partial Reversal Supported

Use Same Authorization Multiple Times

Charge Consolidation Allowed

Consolidation Window (Hrs)

Allow Authorizations To Exceed Settlement Request

Hours Before Authorization Expiration

Hours Authorization Can Still be Reversed

Charge Up To Available

Configuration of Order Modification Rules

Feature Overview

- Previously order status modification rules were only configurable by Enterprise and document type. This release introduces the ability to configure the rules based on user groups and order types.

Capabilities

- Ability to trigger order modifications by user defined conditions
- Allows users belonging to different groups to be able to perform various levels of Order modifications based on the order status

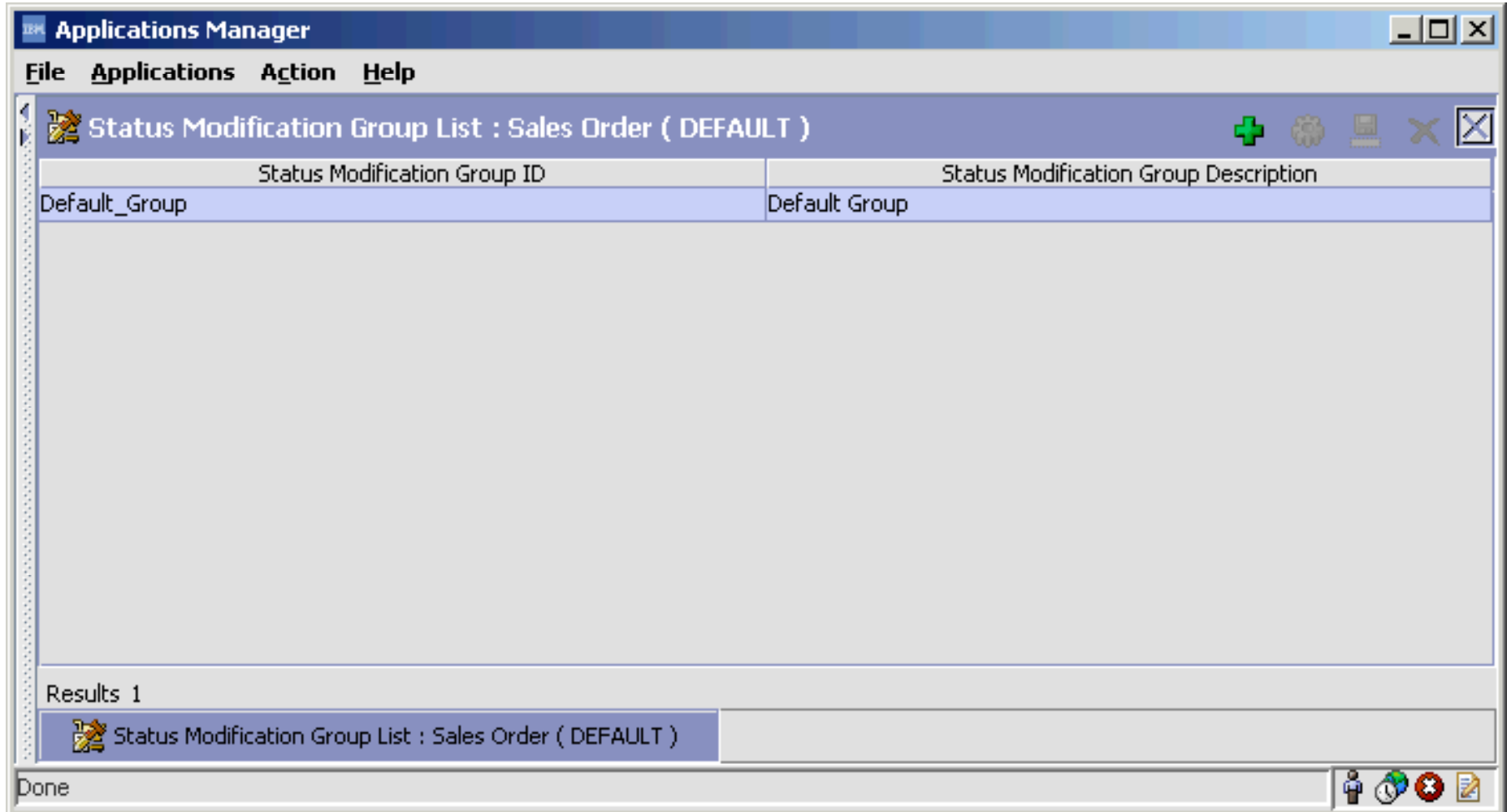
Benefits:

- Flexibility in setting up groups and managing modification rules for them –

For example: A Fraud Analysis Team member cannot update/change customer address or delivery method on an Order, where as a manager or a regular CSR can make those changes.

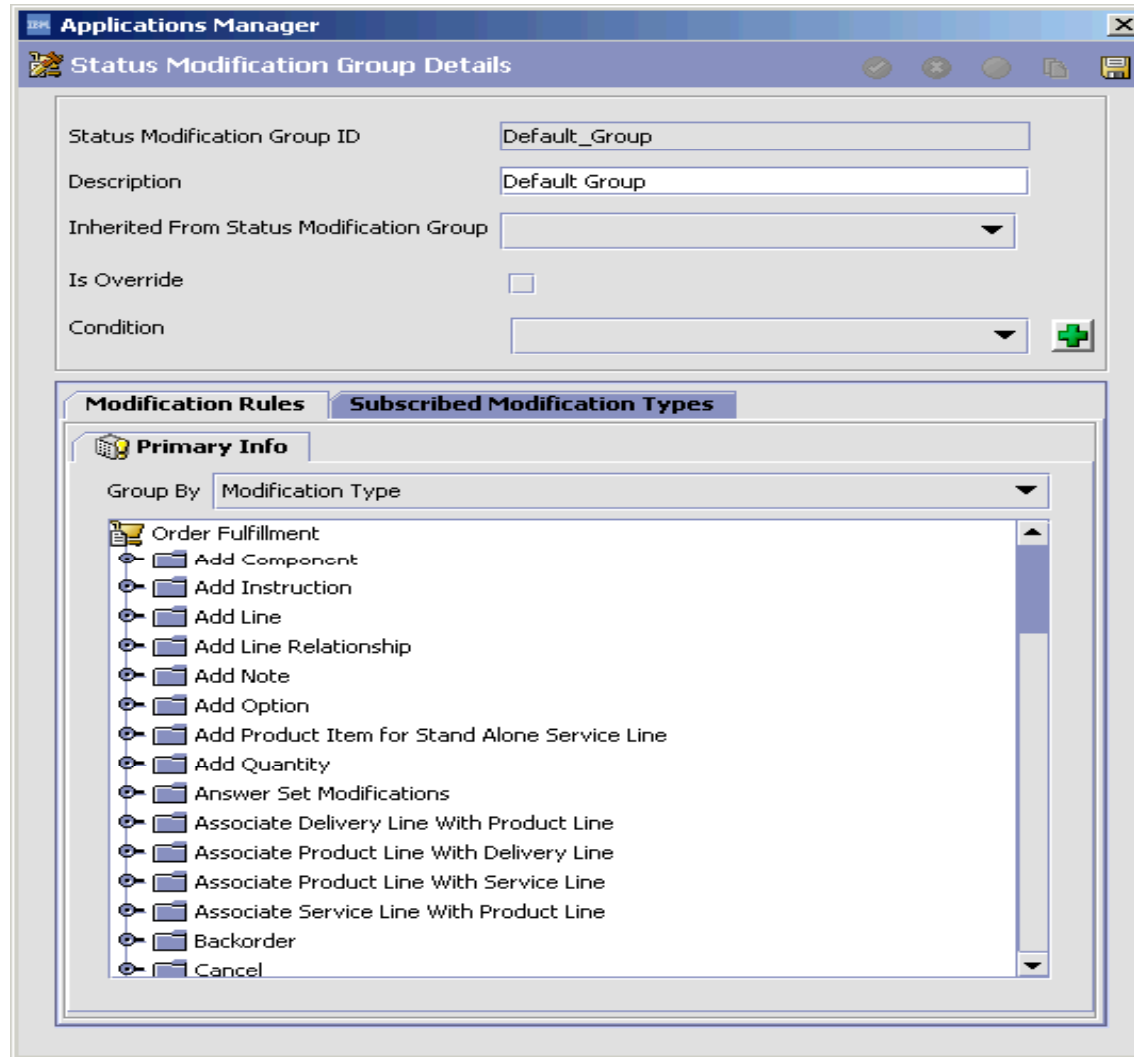
Order Modification Configuration

Group Definition



Order Modification Configuration

Group Details



STORE FEATURES

Ship from Store

Feature Overview

- Utilize the Store as a fulfillment center thereby matching customer demand with excess and slow moving supply on store shelves

Requirement

- Ability to perform a (backroom) Pick for the Order/Shipment
- Ability to perform a Pack into Parcel(s) for the Shipment
- Ability to Ship the shipment with necessary Labels and Inserts
- Ability to assign a Tracking # for the Shipment
- Integration with Parcel systems and Carriers for updates and documents

Comment

- Capabilities exist in SIM, WMS, Foundation
- Extension of current RCP-based Store client

Associate prints pick tickets for Shipment

Print Pick Ticket

Store #: Mtrx_Store_1 | abrooks (Store Manager) 8 Pick Ticket(s) printed successfully.

Quick Access | Advanced Shipment Search | *Shipment 2135 | Print Pick Ticket | Backroom Pick | Advanced Shipment Search

Print Pick Tickets For

- All shipments pending pick
- All shipments for order #
- Search shipments to print pick tickets

Print Ctrl+Shift+P | Close Esc

Associate records pick activity for each Shipment

Backroom Pick

Tasks

Store #: Mtrx_Store_1 | abrooks (Store Manager) 1

How may I help you with this shipment?

Quick Access
Advanced Shipment Search
*Shipment 2135

Shipment Details

Shipment #	2135	Store notified on	04/28/2011
Service	FEDEX PRIORITY OVERNIGHT	Customer Name	
Receiving Node	Mtrx_Store_3	Expected Ship Date	05/01/2011
		Status	Ready for Backroom Pick

Scan Item

Item ID

Last Scanned Item

Items to be picked

Order #	Item Description	Quantity to pick	Quantity	UOM
2125	Tierra 42" Plasma Television/ HDTV(1000...	10.00 of 10.00	0.00	Each

Next F11 Close Esc

Shipping Label and Return Labels (if any) are printed on packing each container. Shipping label is then pasted on the container. Return labels are packed inside container.

Shipping Label

Return Label

From: (990) 017 4864
 John Roberts
 John Roberts
 234 Copley Place



CLS050107/14/23

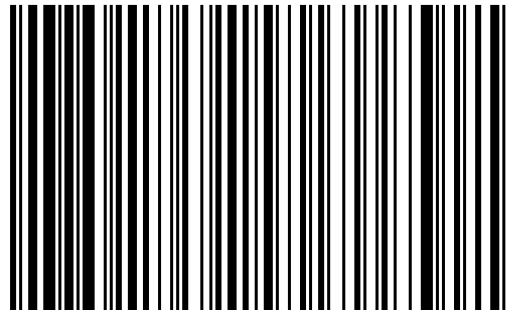
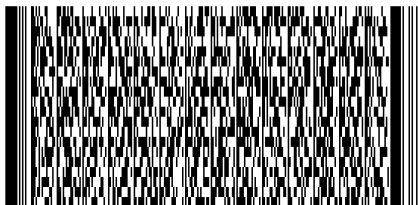
Boston, MA 02116

Ship Date: 18MAY11
 ActWgt: 10 LB
 System#: 72257/FXRS0776
 Account#: S 001200011

Invoice #
 Reference #
 PO #
 Dept # Ship ID

SHIP TO: (990) 017 4864
 John Doe

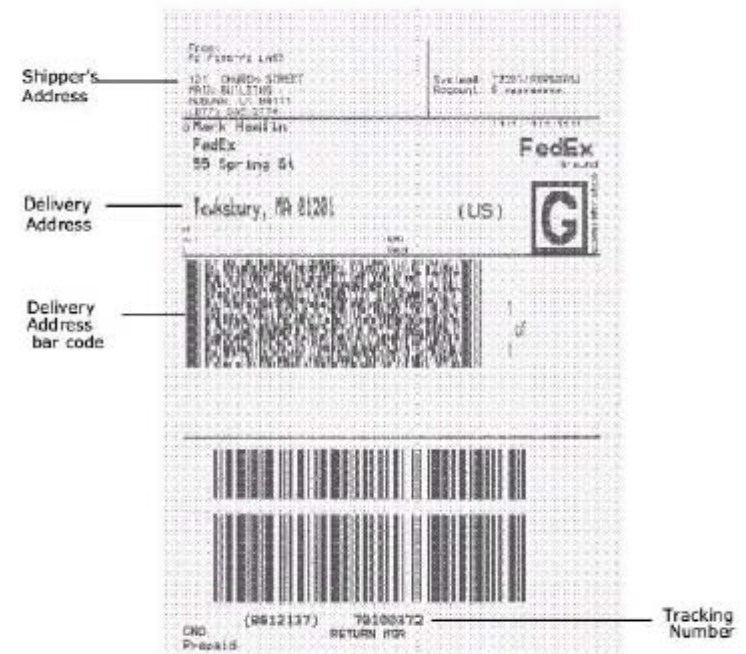
BBBBBB
 BBBBBBBBBBBB
 BBBBBBBBBBBBBB, BB 01851



(9612417) 0122035 71376979

GND 417

3rd PARTY



CONFIGURE, PRICING, QUOTE FEATURES

CPQ Enhancements

▪ IBM Sterling Configurator

- Additional AJAX features to the Configurator presentation user interface providing more desktop-like experience for the end-user/shopper
- More out-of-the-box UI controls, reducing the development costs of UI customization
- Improved model testing and debugging presenting performance of compatibility tables, helping modelers better assess Configurator run-time performance

▪ IBM Sterling Quotes

- Multiple Quote Approval Plans provide the ability to create more than one quote workflow, and therefore to submit quotes to approvers based upon the specifics of line items in the quote.
- Quote Approval Plan creation in Business Center, providing pricing manager convenience.
- Quote approver delegation allows members of the quote approval workflow to indicate colleagues or other managers who will participate in the quote workflow in their stead, such as while the delegator is away from work.
- Document attachments, offering capability to save proposals and related documents for specific quotes in progress or completed.

Sterling Configurator – New UI Controls

The screenshot displays the Sterling Configurator interface. At the top left, there is a 'My' header. To the right of the header are three buttons: 'Cache', 'Debug', and 'Clear'. Below the header, there are two tabs: 'UEV1' and 'UEV2*'. The main content area is titled 'Test UI Controls' and contains a 'Help Me Decide' button. Below this, there are two controls: 'UEV Slider1' with a value of 1.35 and a slider ranging from 1.0 to 2.0, and 'UEV Spinbox1' with a value of -2. At the bottom of the main area are two buttons: '<< Select' and 'Review and Buy'. On the right side, there is a summary panel with the following text: 'Starting price: \$0.00', 'Instant savings: \$0.00', and 'Subtotal: \$0.00'. Below this text is a 'Review and Buy' button. At the bottom of the summary panel, there are two expandable items: '▲ My UEV1' and '▲ My UEV2*'. The entire interface is enclosed in a light gray border.

CPQ – Quote Approver Delegation

The screenshot displays the IBM Sterling Order Management user interface. At the top, the user is identified as 'Mike Russell' with links for 'Help', 'Preferences', and 'Sign Out'. The main navigation bar includes 'Home', 'Opportunities', and 'Quotes'. The 'Home' section features a search bar and buttons for 'Opportunity' and 'Quote'. A 'Dashboard' section is visible with a 'My Quotes Pending Approval' table (currently empty) and a 'Recently Modified' section. A 'Preferences' dialog box is open, showing the 'My Delegate' configuration. The dialog includes a checkbox for 'Hide Navigation Panel' and a search bar for 'Delegate User ID' with the value 'mvernon'. It also has date pickers for 'Effective Start Date' (05/28/2012) and 'Effective End Date' (06/04/2012). 'Save' and 'Close' buttons are at the bottom of the dialog. In the background, a 3D bar chart shows a probability of 70-89%.

CPQ (cont.) and Administration Enhancements

- **IBM Sterling CPQ for Salesforce.com**
 - AppExchange Certification

- **Commerce as-a-Service**
 - Email-based alerts triggered by Quote status conditions, providing notification to Approval Plan participants who may not be logged into Sterling CPQ Field Sales user interface

Business Intelligence Accessible from Sterling Business Center

The screenshot displays the IBM Sterling Business Center interface. At the top, the page title is "Business Center". On the right side of the header, there are links for "Administrator Help" and "Sign Out", along with the IBM logo. Below the header is a navigation bar with icons and labels for "Home", "Products", "Pricing", "Customer", "Inventory", and "System Setup". On the far right of this bar, it shows "Organization: Hub Organization" and a "Switch to" dropdown menu.

The main content area is titled "Pricing" and contains a "Dashboard" section. The dashboard includes a "Reset Dashboard" link and a "Customize >>" link. The dashboard is organized into several widget areas:

- Pricing:** This widget contains four sub-sections: "Price Lists" (with links for "New Price List" and "Find Price List"), "Coupons" (with links for "New Coupon" and "Find Coupon"), "Pricing Rules" (with links for "New Pricing Rule" and "Find Pricing Rule"), and "Manual Pricing Rules" (with links for "New Manual Pricing Rule" and "Find Manual Pricing Rule").
- Quotes:** This widget contains two sub-sections: "Approval Plans" (with links for "New Approval Plan" and "Find Approval Plan") and "Approval Rules" (with links for "New Approval Rule" and "Find Approval Rule"). Below these is a "Test Pricing" section with a "Test Pricing" link.
- Active Coupons:** This widget displays the message "There are no coupons available".
- Favorite Searches:** This widget displays the message "There are no favorite searches" and includes a "Manage Saved Searches" link.
- Recently Modified:** This widget displays the message "There are no recently modified entities".
- Business Intelligence:** This widget contains a "Business Intelligence" icon and a "Launch Business Intelligence" link.

BUSINESS INTELLIGENT FEATURES

BI Enhancements & Key features in Gemini (v9.2)

- Upgrading the Sterling Business Intelligence infrastructure to IBM Cognos BI 10.1.1 and Cognos Application Workbench v10.1
 - Richer look & feel, better reporting capabilities
 - Easier to use for business users
 - More unified user interface with integrated analytics
- Returns reports
- Backorder demand analysis reports
- Capability to run ad-hoc analysis reports
- Capability to extract data from data mart to text files

Modified Perfect Order Dashboard

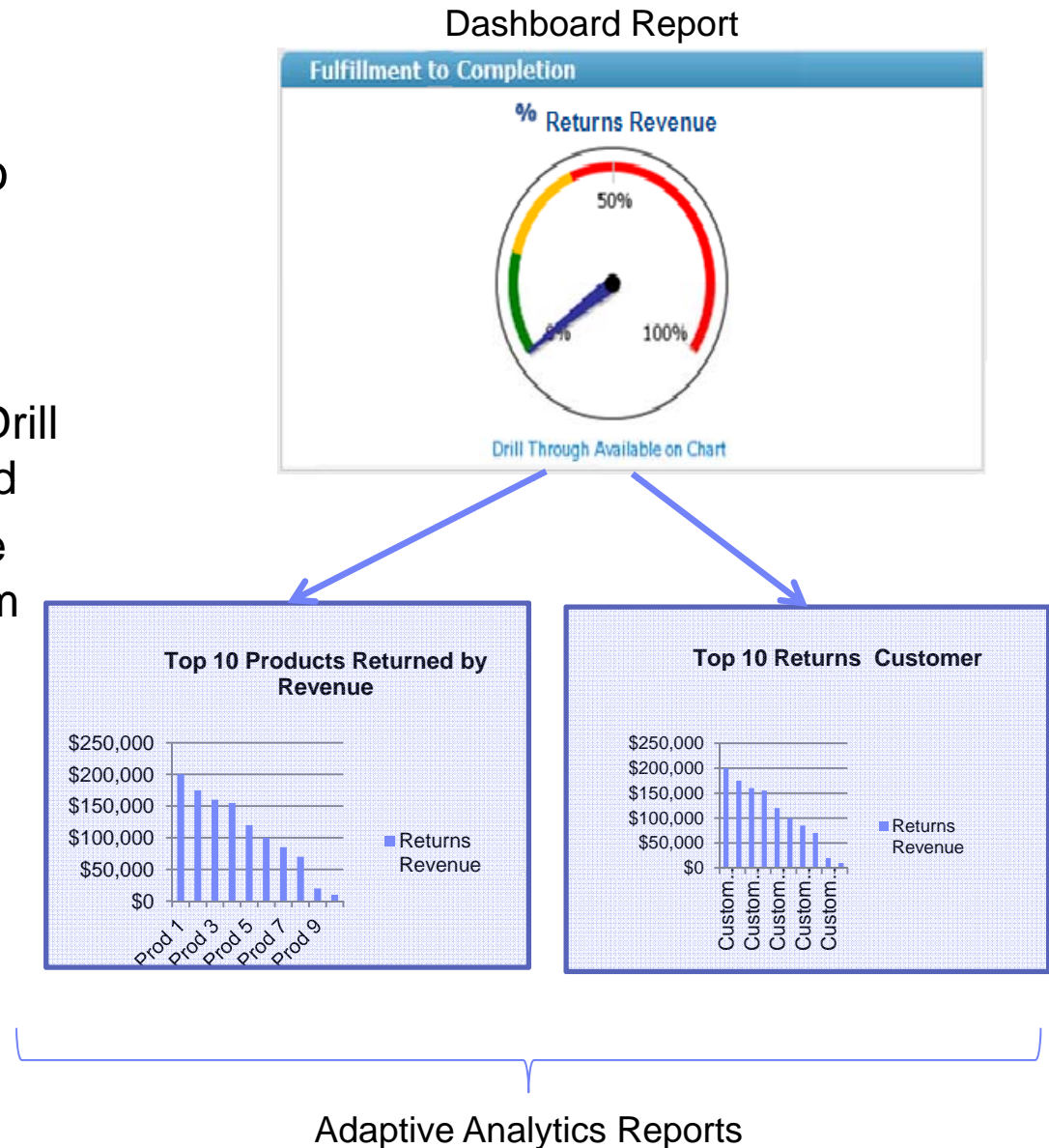
- Perfect Order Dashboard contains Dashboard reports that provide a high level overview of the various order related metrics
- A new “%Returns Revenue” report has been added to the Dashboard. Provides the % impact of returns on the overall revenue
- Has drill through capabilities



Newly added %Returns Revenue report

Returns Reports

- Two types of reports related to Returns have been added
 - Dashboard Reports
 - Adaptive Analytics Reports
- AA Reports will be available as “Drill through” reports on the dashboard
- Additional Operational reports are available as further drill down from the AA reports



Top 10 Returns By Revenue

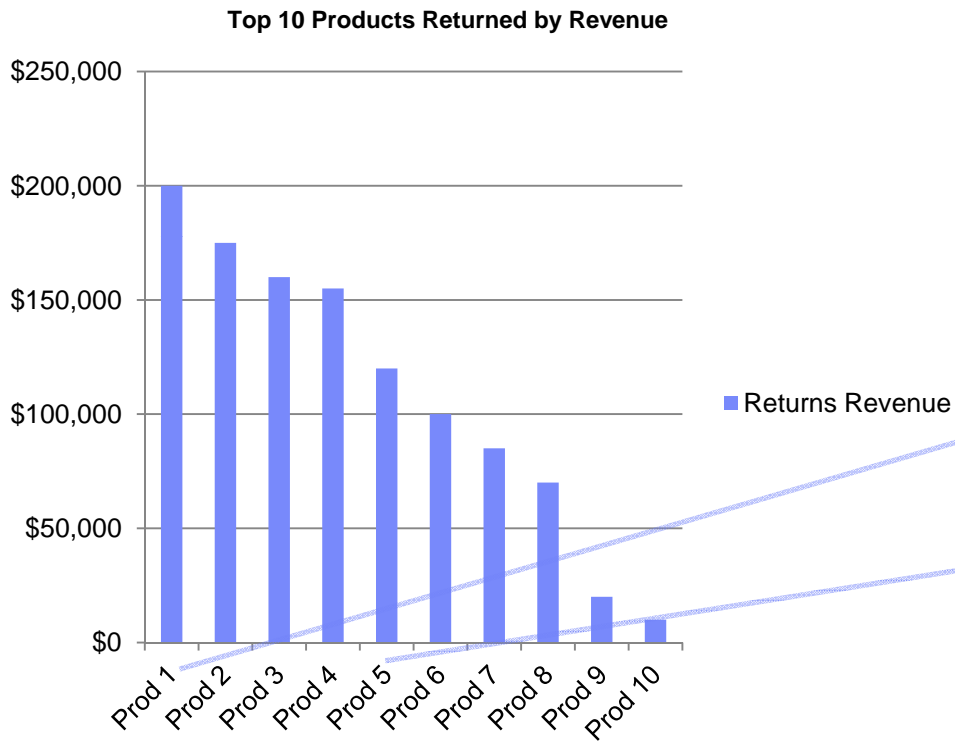
- This report would provide information on the top 10 products that are returned based on revenue
- In addition to the above, there will be an *Operational Report* “Top 10 Return Reasons by Product” that will be provided as a drill down from the Chart showing the top 10 products returned
- Provides the capability to the business user to drill down further to see the top returned reasons for a particular product
- This report will be accessed by clicking on the one of the bars in the chart which will bring up the operational report in a new window

Benefits:

- Helps the business identify top returned products and top reasons for it. *For example:*

Say if the top reason for returning product 1 is “Faulty product” – then may be the business can source if from another manufacturer or stop carrying that product altogether.

Top Products Returned - Example



For Product 1				
Return Reason Code	Return Description	Revenue	Returned Qty	
Ret 1	For Product 5			
Ret 2	Return Reason Code	Return Description	Revenue	Returned Qty
Ret 3	Ret 1	Faulty	\$200,000	5000
Ret 4	Ret 2	Broken	\$150,000	2000
Ret 5	..	..	..	..
Ret 6	Ret 3	Changed mind	\$125,000	1500
Ret 7	Ret 4	..	..	..
Ret 8	Ret 5	..	..	..
Ret 9	Ret 6	..	..	..
Ret 10	Ret 7	..	..	..
	Ret 8	Don't need it	\$1,500	50
Ret 9	..	..	..	..
Ret 10	Don't need it	..	\$1,500	50

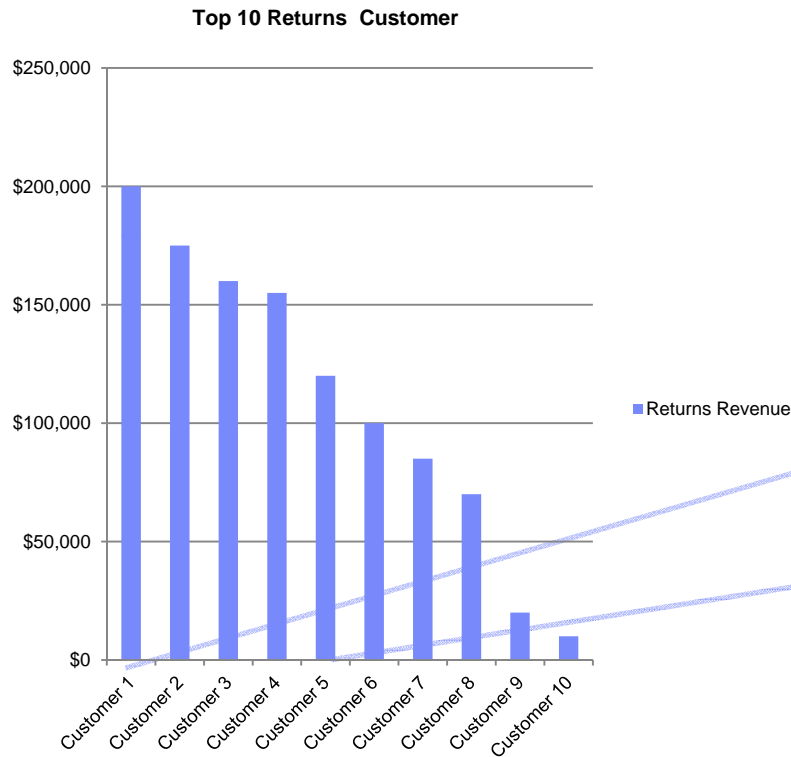
Top 10 Customer By Return Revenue

- This report would provide information on the top 10 customers who do the most returns
- This is applicable to both B2B and B2C scenarios. In a B2B scenario it would be helpful in identifying customer issues and improving customer service. While in a B2C scenario, it would be useful in detecting fraud
- This report also will have a drill through Operational Report “Top 10 Return Reasons by Customer”
- Provides the capability to the business user to drill down further to see the top returned reasons for that particular customer
- This report will be accessed by clicking on the one of the bars in the chart which will bring up the operational report in a new window

Benefits:

- Helps in improving account relationship and improving customer experience

Top Customers by Return Revenue - Example



Customer 1				
Return Reason Code	Return Description	Revenue	Returned Qty	
Ret 1				
Ret 2				
Customer 5				
Return Reason Code	Return Description	Revenue	Returned Qty	
Ret 3				
Ret 1	Faulty	\$200,000		5000
Ret 4	Ret 2 .. Broken	\$150,000		2000
Ret 5	..			
Ret 6	Ret 3 .. Changed mind	\$125,000		1500
Ret 7	Ret 4			
Ret 8	Ret 5			
Ret 9	Ret 6			
Ret 10	Ret 7 .. Don't need it	\$1,500		50
Ret 8				
Ret 9	..			
Ret 10	Don't need it	\$1,500		50

Backorder Demand Analysis reports

- Report Details
 - View in-flights backorders by product by distribution centers/store
 - Drill into product backlog details – backordered quantity and promised date
- Benefits
 - Allow supply chain managers better visibility into backorders to enable execution of manual inventory balancing where needed

Sterling Business Intelligence

Home Order Quote Returns Favorites Help

Backorder Demand Analysis Summary Report

Backorder Demand Analysis Summary Report

Report

IBM Cognos Viewer - Backorder Demand Analysis Summary Report

Backorder Demand Analysis Summary Report

Assigned Node	Ship To Region	Product	BackOrdered Quantity
-	MA	Alpha 890 Advanced Universal Remote	12
		X-540 Multimedia Surround Sound Speaker System (6-Piece)	4
		Alpha TERRA/ 42" Class / 1080p / 60Hz / LCD HDTV	1,000
Matrix - Boston		Omega Progressive-Scan DVD Player with 1080p Upconversion	8
	MA	Tierra 42" Plasma Television/ HDTV	100
Matrix Warehouse - East		Tierra 42" Plasma Television/ HDTV	5
	MA	Alpha 890 Advanced Universal Remote	5,000
		Alpha TERRA/ 42" Class / 1080p / 60Hz / LCD HDTV	1,000
		Tierra 42" Plasma Television/ HDTV	3,100
Matrix Warehouse - West	MA	Alpha 890 Advanced Universal Remote	5,000
		Tierra 42" Plasma Television/ HDTV	1,000

Enable Business Analysis with Ad-hoc Reporting

- Enables business users to create their own analyses without help from IT
- Point, click & drag to build reports and filter data on existing datamarts

The screenshot displays the IBM Cognos 8 BI Query Studio interface within a Windows Internet Explorer browser. The interface includes a menu on the left with options like 'Insert Data', 'Edit Data', 'Change Layout', 'Run Report', and 'Manage File'. Below the menu is a tree view of 'Core Attributes' including 'Enterprise', 'Product Short Name', 'Category Short Name', 'Category Level 1-5', 'Channel', 'Currency', 'Primary Node', 'Delivery Method', 'Fulfillment Type', 'Third Party Node', and 'Payment'. An 'Insert' button is located at the bottom of this tree. The main area shows a report titled 'Fulfilled Revenue Across Products' with a table of data.

Category Short Name	Fulfilled Revenue (Currency)	Product Short Name
DVD Players	0.00	Omega DP2009B Compact DVD Player, Black
	164.00	Omega Progressive-Scan DVD Player with 1080p Upconversion
DVD Players	164.00	
Home Theater	0.00	X-540 Multimedia Surround Sound Speaker System (6-Piece)
Home Theater	0.00	
Notebooks	0.00	Alpha - Studio XPS Laptop with Core2 Duo Processor
Notebooks	0.00	
Televisions	679.99	Omega 42" Plasma Television
	24,449.62	Tierra 42" Plasma Television / HDTV
Televisions	25,129.61	
Televisions Premium	0.00	Alpha TIERRA/ 42" Class / 1080p / 60Hz / LCD HDTV
	0.00	Alpha-Omega Entertainment System
Televisions Premium	0.00	
TV Accessories	0.00	Alpha 890 Advanced Universal Remote
TV Accessories	0.00	
Summary	25,293.61	

The interface also shows the date 'Sep 15, 2011', a page number '- 1 -', and the time '12:12:55 PM'. The browser's address bar shows 'http://localhost/cognos8/cgi-bin/cognos.cgi'.

TECH STACK AND PLATFORM ENHANCEMENTS

Technical Stack

▪ Database Tier

- Oracle 11.2.0.2 (note: Oracle RAC supported on 2-node and 4-node configurations) & Oracle 11.2.0.3 (single instance)
- DB2 9.7.0.5, DB2 9.8 pureScale (supports up to 4 Members (Nodes))

▪ Application Server Tier

- Oracle WebLogic Server 11gR1 (10.3.2), Oracle WebLogic Server 11gR1 (10.3.4)
- IBM WebSphere 8.0, IBM WebSphere 7.0.0.13
- JBoss 5.1

▪ Internet Browser

- Applications Manager & Console (Legacy HTML Framework): IE8, IE9
- Business Center & Field Sales: IE8, IE9, Firefox 3.6, Firefox 4.0, Google Chrome 5+ (latest version), Apple Safari 5.0.3

▪ RCP Client Requirements

- SuSe Linux Enterprise Desktop 11
- Windows XP, Windows 7
- Red Hat Linux WS 5.5

Platform Enhancements

	Enhancement	Comment
Base	New Web UI Framework	New Web UI Framework that will use IBM standard (DOJO) tools for Platform to enable applications to make use of it.
Base	Working With Clustered JMS Queues	Existing capability can lead to a single point of failure on the inbound side. This is an issue we have faced across multiple clients. This will provide an easier way to configure clustered JMS Queues for inbound and outbound JMS Integration.
Base	Prepared Statement caching for Agents	This requirement adds the ability to provide connection pooling for agents - this can be a very big performance boost.
Base	DBVerify Customizable for extensions at customer site	This requirement is to enable and override file where customers can specify those indexes that they have dropped and so DBVerify will not suggest they be added back. Customers should also be able to add their own custom indexes on product and custom tables so that this tool can be run to check exactly their environment.
Base	Use Platform enhancement to prevent right handed indexes	An existing platform feature needs to be enabled in Foundation so that Apps can use it
Extended	Document and if required enhance compliance with Web services security profile 2.0	The Web Services used to integrate with our applications are created using Application Server functionality and so IBM Sterling Web Service compliance with this standard is reliant upon the application server provider (which is a customer choice). Documentation will reflect what we can support and point the customer to WS-I and the Application Server vendor's.

RECONCILED CUSTOMER ENHANCEMENTS

These are customer enhancements delivered via HF/FP in various previous releases that have been reconciled in this latest release. They are not necessarily new features in 9.2

Payments: Charge Transaction Request Enhancements

Feature Overview

- With enhancements made to Charge Transaction Requests (CTR), it will now support settlements and reversals.

Capabilities

- Ability to acquire authorization that accurately matches settlement request
- A new rule has been introduced to prevent use of authorizations that exceed invoice amounts
- A new flag – “Do Not Consolidate Settlement Or Refund Requests Across Invoices”, which will settle each invoice separately, allowing more intelligent selection of authorizations

Benefits

- Reduction in payment transaction fees due to matching of settlement and authorization amounts
- Greater flexibility to settle invoices separate for more accurate tracking purposes

Distance Based Sourcing for Delivery Services

Feature Overview

- Previously the capability to do Distance Based Sourcing was restricted to Products. This has now been enhanced to support Services as well

Capabilities

- Ability to source a Delivery Service from a node or a group of nodes that are within a certain distance radius (configurable) from the *ShipTo* address
- Within a group selected nodes based on this criteria, a specific node for shipment will be selected based on configuration of optimization rules

Benefits

- Decrease costs by selecting the most optimal node for service delivery

Ability to attach Products to a Provided Service

Feature Overview

- Ability to add associated Products to a Provided Service in an Order

Details

- Previously we supported adding of associated Provided Services items to a Product but not the reverse
- We now support adding a Provide Service to an Order and then adding associated Products to it.
- Enhancements were done to both Foundation APIs and to COM screens to support this functionality

Benefits

- Flexibility to configure Services and sell associated products with them

Miscellaneous Enhancements

- RTAM enhanced to include Inventory Organization Code in its output.
 - If there are two Inventory organizations publishing availability for the same item. Then the item availability for each org can be found out based on the Org Code.
- Control Inventory Audit logging Based on Adjustment Type
 - Currently whenever there is change in supply, it is recorded in the logs there by increasing the log size. This ability would allow customer to control the logging based on specific adjustment type such as Supply or a custom adjustment type.
- GetItemListForOrdering API enhanced to return customer entitlements from a complex query
 - Multiple items can be passed into this API and it will return only items that a customer is entitled to using a complex query. Eliminates the need to make API calls repetitively.

REMOVAL OF FUNCTIONALITY

Removal of Function from Offering

Content being removed	Rationale for removal	Communication/Migration Plan
Support for SQL Server DB	Lack of market demand	<p>Only 6 customers are affected.:</p> <ul style="list-style-type: none"> CSC UK (OM) Brown Shoe (OM) Dirt Cheap Group (WMS) Do it Best / True Value (SCV – moving to on-demand) CF Industries (MCS) JCP (Configurator – they use Oracle for OM) <p>To be communicated to account owners and services leads for communication to customer and development of migration plan.</p>
Sterling Web	Sterling Web, and WebSphere Commerce have significant functional overlap, complicating sales and causing confusion when positioning those solutions with prospects.	



REFERENCES

Documentation References

When	What	Where	Link
eGA	Complete documentation for OM and CPQ	SSFS 9.2 Information center	http://pic.dhe.ibm.com/infocenter/ssfs/v9r2/index.jsp
eGA	<p><u>Two Documents:</u></p> <ol style="list-style-type: none"> 1. System Requirements for Software and Hardware 2. Download document about files posted on Passport Advantage 	Support Portal --> Plan & Install tab	http://www-947.ibm.com/support/entry/portal/Planning/Software/Other_Software/Sterling_Selling_and_Fulfillment_Suite
eGA	<p>PDF documents for the following:</p> <ul style="list-style-type: none"> - Upgrade - Installation - Concepts - Configuration/Deployment Guides <p>Note: All of these documents are part of the complete doc available on the Info Center as HTML.</p>	Support Portal --> Product Documentation	http://www-01.ibm.com/support/docview.wss?uid=swg27023881
eGA	<p>Quick Start Guide for OM and CPQ</p> <p>Note: The quick start guide outlines the overall install process & guides users through the media in the box. It includes links to the URLs given above for the Info Center and the Support Portal.</p>	Will be included as part of the media package shipped to on-premise customers	

CONTACT INFORMATION FOR PRODUCT

- ORDER MANAGEMENT (OM, COM, SOM, SIM, WMS)
 - Allison Manetakis – amanetakis@us.ibm.com
 - Anand Kaddi – akaddi@us.ibm.com
 - Anand Narayanaswami – anarayan@us.ibm.com
 - Sudhir Balebail – sudhir.balebail@us.ibm.com
- CONFIGURE, PRICE, QUOTE
 - Eric Marotta – eric.marotta@us.ibm.com
 - Pat Willard – pwillard@us.ibm.com
- OM PLATFORM (Business Intelligence, Tech Stack, Certifications)
 - Subhayu Chatterjee – sschatte@us.ibm.com
- PRODUCT MARKETING
 - Rodney Martinez – rodm@us.ibm.com
 - Peter Wharton – pwharton@us.ibm.com

