Sterling Store

Concepts Guide

Release 9.2

IBM

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Contents

Chapter 1. Overview of IBM Sterling Store

This topic explains the customer order management business challenges and how Sterling Store assists you in solving them.

The following topics are covered in this chapter:

- Business Challenges
- Components of Sterling Store
- Store Application Features

The Sterling Store applications present solutions to the challenges found in typical customer order management business scenarios.

Chapter 2. Business Challenges of IBM Sterling Store

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.

Sterling Store 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 store walk-in order modifications.

Chapter 3. Components of IBM Sterling Store

Enterprise Data

An Enterprise represents the organization that owns and controls all the transactions in Sterling Store. An Enterprise in Sterling Store 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 Sterling Store requires a designated Enterprise.

Order Promising

To ensure that all the customer orders are fulfilled accurately and efficiently, Sterling Store provides a 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, Sterling Store 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 topic describes the Sterling Store concepts associated with the 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 this is accomplished in Sterling Store, you should familiarize yourself 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, Sterling Store's scheduling functionality tries to find alternate nodes where inventory may be available based upon the sourcing setup.

By default, Sterling Store treats each node that is 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 Sterling Store chooses a shipping node that can deliver on the earliest date. You can also optimize based on the number of shipments, so that Sterling Store 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.

Participant Modeling

The business entities that participate as trading partners with an enterprise in the supply chain are referred to as Participants in and Sterling Store. 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.

Delivery and Installation

In addition to the shipped products, Sterling Store 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 Sterling Store represents a group of individual resources that perform the services. It is the primary mechanism of defining and managing capacity within the Inventory Management module of Sterling Store. 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

Sterling Store, Promising functions check capacity availability against the resource pools that match the service and geography requirements of the order line.

Products

Sterling Store provides you with the capability to manage all your products and services through catalogs and catalog organizations.

A **catalog** is an organization's complete set of items. You can use Sterling Store 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 Sterling Store or within an external system. Sterling Store provides extension points if the products are maintained externally.

Payments

Sterling Store can be used to carry out critical payment related processes during order management processing, and enables you to integrate with external payment processing systems such as CyberSource® or Chase™ Paymentech. 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, Sterling Store provides integration points with payment systems to validate the payment methods on the orders.

Order Administration

After 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.

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

Sterling Store also provides configurable rules to control how and when modifications can be performed.

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. Sterling Store has built-in mechanisms to monitor orders and either raise alerts or send e-mail notifications, if applicable.

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

Document Types

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

The following base document types are defined in Sterling Store:
- 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 Sterling Store:
- 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.

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

Sterling Store 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.

Process Type Pipelines

In Sterling Store, 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 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. 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 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 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 4. Order Delivery Base Process Type

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

Table 5. Load Delivery Base Process Type

Derived Process Types	Process Type Pipelines
Load Execution	Load Execution

Table 6. General Base Process Type

Derived Process Types	Process Type Pipelines
General	None

Table 7. 'Pack Process' Process Type

Derived Process Types	Process Type Pipeline
Pack Process	Pack Process

Table 8. Count Execution Process Type

Derived Process Types	Process Type Pipelines
Count Execution	Count Execution

Table 9. Outbound Picking Process Type

Derived Process Types	Process Type Pipelines
Outbound Picking	Standard Pick Process

Table 10. VAS Process Type

Derived Process Types	Process Type Pipelines
VAS	VAS Work Order

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 Sterling Store. 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 Sterling Store, 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.

Externally-Triggered Transactions

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

User-Triggered Transactions

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

Time-Triggered Transactions

A Time-triggered transaction is executed on scheduled intervals. In Sterling Store, a time-triggered transaction is also called an agent.

Conditions

A **Condition** matches document type attributes against the decision points and routes in 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 Sterling Store. 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.

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.

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 pick up status. A document is moved into a **Drop Status** when a transaction and its events have been completed. A **Pick Up Status** takes the document from the drop status and moves it through the next transaction. "Created" and "Scheduled" are examples of statuses.

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.

Services

Services define the business process flow between Sterling Store and external systems.

Logistics

Sterling Store Logistics Management provides capabilities for managing and executing inbound and outbound delivery processes. 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 proactively 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.

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.

The Sterling Store Sales Order Fulfillment pipeline is used to process orders of the `Sales Order` document type within Sterling Store.

Create Orders

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.

Schedule Order

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.

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.

Release Order

After Sterling Store has determined one or more ship nodes that can be utilized to ship the ordered merchandise, those nodes are notified with all 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 sync. When this happens, the `Schedule` transaction sends a notification to a node asking for inventory that does not actually exist. The node then notifies Sterling Store 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.

Ship Orders

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.

Return Orders

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 Sterling Store 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.

Close Orders

After 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 Sterling Store unless explicitly specified on the Search screen.

Purge Orders

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 Sterling Store unless explicitly specified on the Search screen.

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. Sterling Store provides features to help ensure inventory accuracy.

Event Management and Alerts

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

Sterling Store'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.

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 , Store Associate, 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 Store Associates might be collectively placed in a 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.

Returns

Sterling Store 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.

Sterling Store offers a Reverse Logistics module that can be configured and customized to your business needs.

System Administration

The System Management module of Sterling Store allows you to manage integration and agent servers, view the properties of your application servers, enable database caching, and increase trace log output for APIs, user exits, services, and agents.

The System Management module provides features to administer and monitor the various components that make up the Sterling Store applications. The System Management Console provides a complete picture of Sterling Store while it is running. Additionally, the Health Monitor agent can alert system administrators when a problem occurs, such as an application server going down or an agent server not processing tasks.

Advanced System Setup

Sterling Store provides 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.

Customizations

The user interfaces within Sterling Store can be customized to meet your specific business needs. Tools are provided to help you carry out these customizations.

Chapter 4. Overview of IBM Sterling Store Features

This topic provides visibility to features introduced in Sterling Store to assist in meeting your business requirements for your Store environment.

Alerts

This topic provides information regarding the Alert user interface functionality.

Creating Alerts

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

Viewing Alert Information

Sterling Store 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 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.

Searches

Sterling Store supports advanced order, advanced customer, and advanced item and return order searches. This helps you to refine the search criteria using additional options available to view more detailed order, customer or item information.

Pagination

For all search and list screens, smart record retrieval for large record sets is used, unlike typical paging methods that require you to remember which page may have contained the information that you were searching for. This enables you to display the records as a full, complete set. If more records that fit the criteria exist, you can easily retrieve them. Each time this is done, records are appended to the existing record list, until the complete set of records is displayed. The most recent set of records returned is highlighted. For some tasks, the you can sort returned data and view history orders.

Advanced Order Search

When a customer makes complex inquiries about an order, you can perform an advanced order search to locate the order. The advanced order search also enables you to search for draft orders or orders that are placed on hold by a specific hold type.

Advanced Customer Search

If you do not know the complete details of a customer such as the customer's ID, phone number or e-mail address you can perform an Advanced Customer Search to find the customer.

Advanced Item Search

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

Advanced Return Order Search

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

Advanced Opportunity Search

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

Advanced Quote Search

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

Order Tasks

This topic briefly explains the tasks that you can perform on an order. To perform any task, you must first search for an order.

Cancel Order

A customer may want to cancel all or a part of an order. You can cancel an order for items that are not shipped. You can also request a stop delivery for items which are already 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. Sterling Store 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 pick up 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 or an order line 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.

Schedule and Release an Order

A user can schedule and release an order. Scheduling makes sure that the ship nodes have enough inventory to process the order. Releasing involves notifying the ship nodes of the relevant information needed to ship the order.

View Procurement Orders

A user can view procurement orders (Purchase Orders and Transfer Orders) that are created for a sales order and their order summary.

Change Customer Options

After an order is confirmed, a customer may request tax exemptions for the order. You can allow tax exemptions on orders created for the customers. When a

business customer enquires about an order, you can search or retrieve the order details based on the customer's purchase order number. You can also modify the customer's purchase order number for confirmed orders.

Copy Order

A user can create a new order by copying an existing draft order or a confirmed order.

E-Mail Order Information

A user to send information pertaining to a draft order or a confirmed order to a customer through an e-mail.

Price Match 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.

Add 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.

Change and Modify Order Payment Methods

A customer may need to change the mode of payment, modify a payment method, or add a new payment method for an order. To perform these tasks, you need to first search for the order.

Add Stylized Items

After placing an order for a stylized item, a customer may want to change the style of the item. You can change an item's style after adding the item to the order.

A model item is an item that can be used to represent a group of items, all of which have a similar characteristic, such as size or color. These items can be created with multiple child items (stylized items).

Launch the Applications Manager

Users can launch the Applications Manager within user interface.

Pricing Integration

captures the user identifier provided by a buyer during order creation when the IBM® Sterling Selling and Fulfillment Suite is integrated with IBM WebSphere® Commerce. Based on the user identifier the system validates a coupon or retrieves the price of an item. Otherwise, the system retrieves the guest price for an item.

Quote and Opportunity Tasks

Sterling Store enables you to manage opportunities and quotes effectively to help you close business deals more efficiently.

An opportunity acts as a container for holding a quote or related alternative quotes that are to be presented to a customer. A quote, on the other hand, is a commercial document that allows a customer to see a predetermined set of products, their quantity, predetermined price, and delivery date. A quote is always associated with an opportunity.

During the quoting process, you can store all the information, including customer details, information about products and the adjustments made to the price of products, and the payment terms and shipment terms that will be used in the order if the quote is converted to an order.

This topic briefly explains the tasks that you can perform on an opportunity or a quote.

Create Opportunity

Sterling Store provides the ability to create an opportunity. You can then create a quote associated with the opportunity to be presented to a customer.

Create a New Quote for an Opportunity

Sterling Store provides the ability to create a quote for an opportunity. You can then define the items, pricing adjustments, shipment details, and payment information for the quote.

Copy a Quote to Create a New Quote or Opportunity

Sterling Store provides the ability to copy an existing quote to create a new quote and a new opportunity.

Copy a Quote to Create Alternative Quotes

Sterling Store provides the ability to create an alternative quote within an opportunity by copying an existing quote. Alternative quotes are quotes that exist simultaneously and are associated with a single opportunity.

Mark an Opportunity as Lost

Sterling Store provides the ability to mark an opportunity as Lost if the opportunity no longer serves any purpose.

Create Quote

Sterling Store provides the ability to create a quote to allow a prospective buyer to see a predetermined set of products and quantities at a predetermined price to be delivered on a specific date.

Quote Notes

Sterling Store provides the ability to enter additional notes to a quote, describing the various actions taken on that quote for future reference.

Adjust Prices

Sterling Store provides the ability to adjust the price on a quote or individual item lines within the quote. You can also refer to Discount Advisor to decide on a suitable price for an item in a quote line. The Discount Advisor provides a graphical representation of the minimum, maximum, and average discounts provided for the item in the past.

Rework a Quote

Sterling Store provides the ability to rework a quote. If a quote has been rejected internally or by a customer, you can modify or restore a quote to its original status by reworking the quote.

View Alternate Quotes

Sterling Store provides the ability to view the alternate quotes created for a particular quote. Alternative quotes are quotes that are independent of each other, but are associated with a single opportunity. Alternative quotes are used to present different options to a customer.

View or Modify Problem Lines on a Quote

If a quote contains problem lines, Sterling Store provides the ability to view and modify problem lines on the quote before requesting an approval for the quote or presenting the quote to a customer.

Request for a Quote Approval

Sterling Store provides the ability to request an approval for a quote. An approval is required if a quote violates an approval rule.

Approve or Reject an Approval

Sterling Store provides the ability to approve or reject a quote. You can view the list of approvers who are involved in the approval process. You can enter appropriate notes to explain why you are rejecting the quote.

View Quotes Pending Your Approval

Sterling Store provides the ability to view all the quotes that are pending your approval if you are part of the approval process.

Present a Quote to a Customer

Sterling Store provides the ability to present a quote to a customer for whom the quote has been created so that the customer can provide feedback on the quote.

Accept a Quote on Behalf of a Customer

Sterling Store provides the ability to accept a quote on behalf of a customer in order to place an order for the items in the quote.

Reject a Quote on Behalf of a Customer

Sterling Store provides the ability to reject a quote on behalf of a customer.

Generate a Proposal

Sterling Store provides the ability to generate a proposal from a quote and send it to a customer. You can view the proposal in the required format, print the proposal, or save the proposal into a local directory.

Convert a Quote to Order

Sterling Store provides the ability to convert a quote to an order after the quote has been accepted by a customer.

Abandon a Quote

Sterling Store provides the ability to abandon a quote if the quote no longer serves a purpose.

Customer Tasks

This topic briefly explains the tasks that you can perform on an customer record. To perform any task, you must first search for a customer.

Create Customers

Sterling Store provides the ability to create two types of customers:
- Consumer customers - A consumer customer consists of a single contact.
- Business customers - A business customer consists of a Buyer Organization and any number of contacts.

Manage Contacts

Sterling Store provides you with the ability to define multiple business-to-business (B2B) contacts for a customer, and to select the contact or contacts with whom you want to work. Also provided is the ability to modify and delete a contact, define the spending limit and approvers for a contact, and view and add notes about a contact.

Business-to-consumer (B2C) contacts are assumed to be in a 1-1 relationship. Sterling Store provides the ability to modify contact details of a consumer customer.

Web user records can be created for both B2B and B2C contacts, enabling contacts to log in through the web channel. When a web user record is created, an e-mail containing the web user's login and password is sent to the contact.

Manage Business Customer Information

Sterling Store provides the functionality to manage business customer information, such as a customer's business name, Web site, status, shipping preferences, tax information, and currency. In addition, you can manage business customer classifications, such as the customer's relationship type and customer level.

Manage Customer Addresses

Sterling Store provides the ability to define multiple addresses for a customer. You can define addresses at contact level or customer level, depending on where it is launched from.

Manage Payment Methods

Sterling Store provides configurable rules to define multiple payment methods for a customer. You can define payment methods at the contact level and the customer level.

Reset a User's Password

Sterling Store provides the ability to reset a user's password, if a user ID is associated to the user's record.

Customer Team Assignments

Sterling Store enables you to assign customers to a team, after the customer is created. A supervisor can assign a customer from his team to any of his sub teams. Then, all members of the team have access to the orders for that customer.

A team is a collection of users who have common data access requirements. Teams can have access to specific document types, Enterprises, ship nodes, and customers.

Customer User Assignments

Sterling Store provides the ability to assign customers to a user, once the user is created and assigned to a team. A supervisor can search for users from his team and assign the customer to the selected user.

Customer Self Assignments

A user with permissions can assign himself to customers that is available to his/her team. Users can assign customers to themselves up to a maximum limit and also remove customers that they are no longer working with.

Customer Notes

The customer notes or contact notes can be system generated or manually entered by a user. The user can modify or delete notes, or mark notes only for internal viewing purpose. The customer notes must be entered in a customer record and contact notes in a contact record.

User Management Tasks

This topic briefly explains the Create User task and the Create User Team task.

User Creation

Sterling Store enables you to create and manage users.

A user is an employee of the enterprise organization who can log in to the Sterling applications.

If you have the necessary permissions to access this task, you can create users for any of the organizations to which you have access. In addition, you can define a user's access privileges by assigning the user to selected user roles, and you can define the queues to which the user is assigned in order to receive alerts.

User Team Creation

Sterling Store enables you to create, manage, and assign customers to user teams.

A user team is a collection of users who have common data and user interface access requirements. User teams can have access to specific document types, enterprises, ship nodes, customers, and screens within the user interfaces.

Delivery Tasks

This topic explains the delivery tasks in Sterling Store.

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 Sterling Store 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 Service Instructions

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

Changing Service Appointments

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

Delivery and Service Grouping

When a complex order pertaining to numerous products, provided services, and delivery services exists, the task of scheduling appointments for these orders in the appointment scheduling screens of the Sterling Store application becomes difficult.

In such situations, the order lines can be grouped into smaller groups to ensure that appointments are available for the various services.

Miscellaneous Tasks

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

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.

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.

Setting User Preferences

Sterling Store enables you to set many user preferences, such as:
- Display alert notifications
- Additional help messages
- Keyboard shortcuts
- Display or hide customer message panel
- Position of related tasks and message panel
- Remember pagination preferences when performing an advanced search
- Display the scratch pad in the Related Tasks panel or in a pop-up window
- Display or hide the scratch pad after the user logs in to the application

Launching IBM Sterling Business Center

Sterling Store enables users to launch the Sterling Business Center application from within the Sterling Store application, if they have been granted the appropriate permissions. Sterling Business Center provides users with access to item and pricing configurations. For example, users may need to configure the pricing rules for an organization, or they may need to configure catalog entitlements.

Return Order Tasks

This topic explains the tasks that can be performed on a return order.

Create Return Order

A customer may want to create a return order for single or multiple sales orders. Sterling Store provides the ability to create a return for a customer who has no order in the system, who has lost a receipt, or who received the wrong item or an item he did not order. Return orders can also be created based on the container, because a customer may want to return an unopened or damaged package or shipment container.

Create Exchange Order

A customer may want to create an exchange order for the same item or a different item. Sterling Store provides the ability to exchange items, enter return reasons and notes for the original return, and select from a variety of fulfillment options.

Cancel Return Order

A customer may want to cancel some of the items or the entire return order. The customer may also want to cancel the exchange order corresponding to the return order.

Change Return Method

A customer may want to change the fulfillment method of a return order. Sterling Store provides the Change Return Method task, which enables you to change the return method for a return order.

Change Service Appointment

A customer may want to change the service appointment of a return order. Sterling Store provides the Change Service Appointment task which enables you to change the service date and time for a return order.

Change Return Address

A customer may want to change the address of a return order. Sterling Store provides the Change Return Address task, which enables you to change the address on the return order.

Issue Refund Now

A customer may call to inquire about why he has not been refunded for the items which have already been returned. In such situations, you need to issue a refund for the items immediately. Sterling Store provides the Issue Refund Now task, which enables you to issue a refund to the customer immediately.

Report Wrong Items

A customer may report that the customer did not receive the items that were ordered. In such situations you may need to reship the items that were ordered and also create a return for the wrong items that were delivered. For example, if a customer ordered for TV and has received a DVD player instead of the TV, you

need to create a return for the DVD player and reship the TV.

Report Extra Items

A customer may report that the customer has received extra items. For example, if a customer ordered for a TV and has received 2 TV's instead of 1. In such situations, the extra items can either be returned back or you can allow the customer to keep the extra items.

Report Unexpected Items

A customer may report that the customer did not order for any items and has received some items. In such situations you may need to create a customer and then create a return for the wrongly shipped items.

In-Store Tasks

This topic briefly explains the tasks that can be performed in a store.

Advanced Shipment Search

The Sterling Store application provides the advanced shipment search task to search for shipments which need to be picked up by the customer or to be shipped from the current store.

Receive Containers

This task enables a store user to receive shipments from another distribution center or store. Users can search for inbound shipments and view the shipment details before receiving shipment containers or items. The ability to receive individual containers is also provided. However, a store user must ensure to receive all the items of a container.

Print Pick Ticket

The Sterling Store application provides the functionality to print a pick ticket with the details of the items to be picked from the backroom area to the customer pick area.

Backroom Pick

You may want to move the inventory from backroom to the customer pick area or shipment packing area, from where the customer can pick up the items or the items can be shipped to the customer. The Sterling Store application enables you to record the backroom pick details.

Undo Backroom Pick

After performing the backroom pick, the customer may decide not to pick up the order. The Sterling Store application enables you to undo a backroom pick.

Customer Pick

A customer or a gift recipient may visit a store to pick up the items that were ordered. In such situations, you may have to verify the customer/gift recipient and then record the customer pick.

Pack Shipment

Sterling Store provides the ability for stores to ship products directly to customers. You can add items to a container, add containers to a shipment, and pack a shipment. You can also modify or delete a packed container from a shipment. To ship products, carrier integration can be done externally or through the Sterling Order Management either by having a tie-up with one carrier or by using a carrier aggregation software like Pierbridge adaptor to interface with multiple carriers. If a carrier is integrated with the Sterling Order Management, you can print the Carrier and Return labels to a local printer. After the containers are packed for a shipment, you can print a Pack Slip for the shipment.

Note: With this version, a sample Integration with Pierbridge has been provided to illustrate the mapping of Sterling Order Management with a Carrier Aggregation software. This is for illustration purposes only. Customers are free to use this mapping and the accompanying documentation for mapping to their preferred software.

Reprint Pack Slip

A pack slip contains the shipment header information and details of the items packed in a shipment. You can print the pack slip for a shipment to be shipped only after the shipment has been completely packed. The pack slip is displayed as a PDF file and can be printed to a local printer.

Confirm Shipments

Packed shipments are confirmed for shipping after a carrier picks all the shipments. Sterling Store lets you confirm shipments to be shipped. You can select a carrier to list the shipments associated with that carrier service. For a particular shipment, you can view the total number of packed containers that have to be picked by the carrier.

Frequent Queries

This topic 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.

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. Sterling Store 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.

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