Sterling Selling and Fulfillment Suite

IBM

Applications Configuration Guide

Release 9.2

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Contents

Chapter 1. Introduction to Channel Applications Manager

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

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

You can configure the following applications using the Channel Applications Manager:
- IBM Sterling Call Center
- IBM Sterling Store
- IBM Sterling Field Sales

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

Understanding Channel Applications Manager Layout

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

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

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

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

The following table describes the different icons used in the Channel Applications Manager.

Table 1. Icons used in the Channel Applications Manager

Icons	Description
	Create New This icon is used to create a new advanced configuration.

Table 1. Icons used in the Channel Applications Manager (continued)

Icons	Description
	Alerts - This icon is used to indicate open alerts.
	Add/Create New - This icon is used to add a new item or create a new entry.
	Delete - This icon is used to delete an entry.
	Expand - This icon is used to expand a collapsible panel.
	Details - This icon is used to modify the details.
	Details - This icon is used to fix errors.
	Save - This icon is used to save details.
	Search - This icon is used to perform a search.
	Task is Complete - This icon indicates that the task is complete.
	Task is Locked - This icon indicates that the task is currently locked.
	Task is Not Complete - This icon indicates that the task is incomplete.

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

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

Access the Information Center

About this task

To access the Information Center, select Help > Help Contents.

View Error Details

About this task

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

To view the Channel Applications Manager system error descriptions:

Procedure

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

Using Special Characters

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

Chapter 2. Configure IBM Sterling Call Center and IBM Sterling Store

Configuring Initial System Setup for IBM Sterling Call Center and IBM Sterling Store

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

Configuring an Enterprise Profile

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

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

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

Managing Supply Chain Network Model

You can define participants of the supply chain model such as shipping nodes, carriers, vendors, etc. You can use this configuration to determine sourcing decisions.

Managing Products and Categories

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

Configuring Delivery and Installation

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

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

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

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

Defining Customers

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

Configuring Order Promising Rules

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

Configuring Payment Handling

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

Configuring Order Administration

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

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

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

Configuring Store Pick Up Administration

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

Configuring Outbound Logistics

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

Configuring Business Process Models and Monitoring Rules

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

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

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

Configuring Inventory Synchronization

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

Configuring Return Administration

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

Configuring Alert Management

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

Configuring User Security

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

Configuring System Administration for IBM Sterling Call Center and IBM Sterling Store

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

Extending and Customizing the Application

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

Configuring Store-Specific Tasks

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

Chapter 3. Configure the IBM Sterling Field Sales Application

Configuring Initial System Setup for IBM Sterling Field Sales Application

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

Configuring an Enterprise Profile

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

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

Managing Supply Chain Network Model

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

Managing Products and Categories

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

You can configure the following rules as part of this configuration

- Configure Units of Measure
- Manage Products
- Define Types of Product Classifications
- Define Classification Values
- Define Association Types for an Item

Defining Customers

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

Configuring Payment Handling

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

Configuring Quote Administration

You can configure rules as part of this configuration to modify and validate quotes.

Configuring Opportunity Administration

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

Configuring Business Process Models and Monitoring Rules

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

Configuring User Security

You can configure rules for User Security as part of this configuration

System Administration for IBM Sterling Field Sales Application

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

Extending and Customizing the Application

Extend the application by creating new user interface resources, menus, themes, custom common codes, and customer error codes.
- Configure User Exit Management
- Customize the Application Menus
- Define Extended Application Resources
- Define Themes
- Define Custom Common Code Types
- Define Custom Common Codes
- Define Custom Error Codes

Chapter 4. Configure IBM Sterling Business Center

Configuring an Enterprise Profile

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

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Configuring Change Project Management

Many users implement new features or database changes as separate projects. A Change Project provides the mechanism to consolidate database changes as a single unit and is a collection of smaller tasks called "Change Requests". Change Project Management allows users to implement the database changes on a staging or a testing environment before implementing them on a production environment.

The Change Project Management module allows you to configure the following:
- Change Project Rules
- Change Requests

Note:

You can use the Change Project Management configuration feature only after you have configured your enterprise profile. Refer to the topic Configuring an Enterprise Profile for details on configuring an enterprise.

Define Change Project Rules

Each installation or deployment must define its own project rules for Change Projects in the system.

You can define the following project rules from the Change Project Rules screen.
- Entity locking level
- Synchronization time at which the Change Projects must be exported.

Set Entity Locking Level

The entity lock level can be set at either Change Request or Change Project level. Multiple designated users can work on a Change Project simultaneously, however, a user can work only on one Change Request at a time. In such a scenario, changes being made to a Change Request for a Change Project are locked so that other users cannot override the changes for the same project. The default locking level is Change Request.

- To set the entity locking level, perform the following steps:

   1. In the Channel Applications Manager, click ⊞ adjacent to Change Project Management to expand the branch.
   2. Select Define Change Project Rules.
   3. The Change Project Rules screen is displayed.
   4. Select the level at which the changes must be locked from the **Level At Which Changes Should Be Locked** drop-down list.
   5. Click 🖫 .

Set a Sync Time

A Change Project is published on the production environment when a sync time is set, which is defined by the enterprise.

To set a sync time, perform the following steps:

1. In the Channel Applications Manager, click ⊞ adjacent to Change Project Management to expand the branch.
2. Select Define Change Project Rules.
3. The Change Project Rules screen is displayed.
4. Enter a time (HH:MM format) in the **Change Project is Available For Synchronization At** text box.
5. Click 🖫 .

Manage Change Requests

Use the Manage Change Requests module in the Channel Applications Manager to manage Change Requests. The Change Requests screen allows you to view a list of change requests assigned to the current logged in user, view the details of a Change Request or mark a Change Request as complete.

To view Change Requests, perform the following steps:

1. In the Channel Applications Manager, click ⊞ adjacent to Change Project Management to expand the branch.
2. Select Manage Change Requests.
3. The Change Requests screen is displayed with a list of available Change Requests along with their status.
4. Select a Change Request from the list.
5. After you select a Change Request, you can do one of the following operations:
6. Click 🛠 to view the details of the Change Request. The Change Request Details dialog box is displayed with the Change Request details such as Change Request ID, Change Project ID, Status, Short and Long Descriptions.
7. Click ☑ to mark a Change Request as complete.

Note: Only Change Requests that are in "Work in Progress" status can be marked complete.

8. Click to mark a Change Request as "Work in progress" for the logged in user.

9. Click to remove the Change Request from "Work in progress" status for the logged in user.

   Note:
   The Change Request status does not change to "Open".

Chapter 5. Access the Channel Applications Manager

About this task

To access the Channel Applications Manager:

Procedure

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

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

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

Chapter 6. Create a New Enterprise Organization

About this task

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

To create a new Enterprise:

Procedure

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

Chapter 7. Define Units of Measure for Quantity

About this task

To define units of measure for quantity:

Procedure

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

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

Chapter 8. Define Units of Measure for Service Quantity

About this task

You can define units of measure for service quantity.

To define units of measure for service quantity:

Procedure

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

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

Chapter 9. Define Units of Measure for Dimension

About this task

You can define units of measure for dimension.

To define units of measure for dimension:

Procedure

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

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

Chapter 10. Define Units of Measure for Volume

About this task

You can define units of measure for volume.

To define units of measure for volume:

Procedure

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

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

Chapter 11. Define Units of Measure for Weight

About this task

You can define units of measure for weight.

To define units of measure for weight:

Procedure

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

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

Chapter 12. Define Units of Measure for Time

About this task

You can define units of measure for time.

To define units of measure for time:

Procedure

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

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

Chapter 13. Configure Installation Rules

About this task

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

To configure the installation rules:

Procedure

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

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

Chapter 14. Define Locales

About this task

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

To define a locale:

Procedure

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

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

Chapter 15. Define Countries or Regions

About this task

You can set up common codes for country or region codes used when setting up locales. This common code identifies the country or region that the locale is located in.

To define a country or region:

Procedure

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

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

Chapter 16. Define Languages

About this task

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

To define a language:

Procedure

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

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

Chapter 17. Define Date Formats

About this task

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

To define a date format:

Procedure

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

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

Chapter 18. Define Time Formats

About this task

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

To define a time format:

Procedure

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

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

Chapter 19. Define Date and Time Formats

About this task

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

To define a date time format:

Procedure

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

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

Chapter 20. Define Currencies

About this task

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

To define a currency:

Procedure

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

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

Chapter 21. Configure Currency Conversions

About this task

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

To configure a currency conversion:

Procedure

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

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

Chapter 22. Configure Data Version Labels

About this task

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

To configure a data version label:

Procedure

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

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

Chapter 23. Configuring an Enterprise Profile

About this task

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

Even though most business rules are controlled by the Enterprise, pricing rules are always controlled by the Seller organization in both sales and purchase situations.

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

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

Chapter 24. Define Shipping Nodes and Stores

About this task

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

To define a shipping node and store:

Procedure

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

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

Chapter 25. Define Carriers

About this task

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

To define a carrier:

Procedure

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

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

Chapter 26. Define Vendors

About this task

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

To define a shipping node and store:

Procedure

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

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

Chapter 27. Configure the Fulfillment Network Model

About this task

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

To configure the fulfillment network model:

Procedure

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

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

Chapter 28. Define Region Match Preferences

About this task

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

To define the region matching preferences:

Procedure

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

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

Chapter 29. Configure Region Levels

About this task

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

To configure the region levels:

Procedure

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

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

Chapter 30. Configure Region Schemas

About this task

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

To configure a region schema:

Procedure

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

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

Chapter 31. Define Node Types

About this task

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

To define a node type:

Procedure

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

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

Chapter 32. Configure Level of Service

About this task

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

To configure the level of service:

Procedure

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

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

Chapter 33. Configure Receiving Dispositions for Purchase Order

About this task

As an advanced configuration, you can configure receiving dispositions for purchase order receipts.

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Receiving Dispositions for Purchase Order.

   For more information about defining receiving dispositions for purchase orders, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Chapter 34. Configure Receiving Dispositions for Transfer Order

About this task

As an advanced configuration, you can configure receiving dispositions for transfer order receipts.

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Receiving Dispositions for Transfer Order.

   For more information about configuring the receiving dispositions for transfer orders, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Chapter 35. Configure Receiving Preferences for Purchase Order

About this task

As an advanced configuration, you can configure the receiving preferences for purchase orders and enable users to receive more than the ordered quantity.

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Receiving Preferences for Purchase Order.

   For more information about defining receiving preferences for purchase orders, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Chapter 36. Configure Receiving Preferences for Transfer Order

About this task

As an advanced configuration, you can configure the receiving preferences for transfer orders and enable users to receive more than the ordered quantity.

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to Manage Supply Chain Network Model to expand the branch.
2. Click the Advanced Configurations link.
3. Select Configure Receiving Preferences for Transfer Order.

   For more information about defining receiving preferences for transfer orders, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Chapter 37. Configure Units of Measure

About this task

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

To configure units of measure:

Procedure

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

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

Chapter 38. Manage Products

About this task

You can manage the product items that you sell.

To manage the products:

Procedure

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

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

Chapter 39. Define Types of Product Classifications

About this task

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

To define the types of product classification:

Procedure

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

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

Chapter 40. Define Classification Values

About this task

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

To define the classification values:

Procedure

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

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

Chapter 41. Define Alternate Identifications for an Item

About this task

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

To define alternate identification for an item:

Procedure

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

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

Chapter 42. Define Association Types for an Item

About this task

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

To define an association type for an item:

Procedure

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

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

Chapter 43. Configure Display of Model Items

About this task

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

To configure display of model items:

Procedure

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

   Field   Description

   Display With Radio Buttons
   > Select this option to display the attributes of the model item with radio buttons.

   Display With List Boxes
   > Select this option to display the attributes of the model item with list boxes.

   Preview
   > Based on the option chosen, a preview of the Style Items pop-up is displayed.

5. Click the **Save** icon to save your changes.

Chapter 44. Configure the Display of a Product Web Page for an Item

About this task

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

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

Procedure

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

Chapter 45. Configure Item Search Options

About this task

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

To configure item search options:

Procedure

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

   Field   Description

   Search Through All Items
   > Select this option to allow users to search for all the items present in the database.

   Search Through Items Currently Being Sold
   > Select this option to enable users to search only for items that are available in the current active search index.

   Allow User To Search All Items in the Database Or Only Items Currently Being Sold
   > Select this option to allow users to either search for all the items in the database or only for the items that are available in the current active search index.

   Enable the Scanning Of Items Using Barcode
   > Select this check box to allow users to search for an item using the alternate item identifiers.

   Enable Availability Checks During Item Search To Be Performed Using Cached Inventory
   > Select this check box to check for item availability during an item search, using a cached inventory.

5. Click the **Save** icon to save your changes.

Chapter 46. Define Slot Groups

About this task

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

To define a slot group:

Procedure

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

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

Chapter 47. Define Service Skills

About this task

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

To define a service skill:

Procedure

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

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

Chapter 48. Define Delivery Service UOM Master

About this task

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

To define a delivery service UOM master:

Procedure

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

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

Chapter 49. Define Delivery Service Types

About this task

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

To define a delivery service type:

Procedure

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

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

Chapter 50. Define Options Offered with Delivery Services

About this task

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

To define the options offered with delivery services:

Procedure

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

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

Chapter 51. Define Installation Service of UOM Master

About this task

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

To define the installation service of UOM master:

Procedure

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

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

Chapter 52. Define Installation Service Types

About this task

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

To define the installation service types:

Procedure

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

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

Chapter 53. Configure Options Offered with Installation Services

About this task

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

To configure options offered with installation services:

Procedure

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

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

Chapter 54. Select Region Usage for Resource Pools

About this task

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

To select region usage for resource pools:

Procedure

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

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

Chapter 55. Define Address-Related Questions

About this task

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

To define address-related questions:

Procedure

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

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

Chapter 56. Define Types of Capacity and Service Classifications

About this task

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

To define types of capacity and service classification:

Procedure

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

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

Chapter 57. Configure Sourcing Rules for Delivery

About this task

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

To configure sourcing rules for delivery:

Procedure

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

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

Chapter 58. Define Node Groups for Installation Services

About this task

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

To define node groups for installation services:

Procedure

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

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

Chapter 59. Configure Sourcing Rules for Installation

About this task

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

To configure sourcing rules for installation:

Procedure

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

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

Chapter 60. Define Resource Pools

About this task

Resource pools represent sets of resources that provide the services.

To define resource pools:

Procedure

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

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

Chapter 61. Configure Service Supervisors

About this task

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

To configure service supervisors:

Procedure

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

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

Chapter 62. Configure Capacity Rules

About this task

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

To configure capacity rules:

Procedure

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

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

Chapter 63. Define Service Complexity Levels

About this task

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

To define service complexity levels:

Procedure

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

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

Chapter 64. Configure Additional Capacity

About this task

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

To configure additional capacity:

Procedure

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

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

Chapter 65. Configure the Delivery Appointment Calendar View

About this task

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

To configure the default view of the appointment calendar:

Procedure

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

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

5. Click the **Save** icon to save your changes.

Chapter 66. Configure Customer Rules

About this task

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

To configure customer rules:

Procedure

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

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

Chapter 67. Configure Contact Types

About this task

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

To configure contact types:

Procedure

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

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

Chapter 68. Define Customer Definitions

About this task

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

To define customer definitions:

Procedure

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

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

Chapter 69. Define Titles

About this task

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

To define titles:

Procedure

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

   Field   **Description**

   Title   Enter the title.

   Short Description
        Enter a short description of the title.

   Long Description
        Enter a long description of the title.

5. Click the **Save** icon to save your changes.

Chapter 70. Configure Customer Search Rules

About this task

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

To configure customer type rules:

Procedure

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

   Field   **Description**

   Display screen which performs advanced customer search
   > Select this option to use the advanced customer search screen.

   Display screen which performs address search
   > Select this option to use the address search screen.

   Display screen which performs basic customer search
   > Select this option to use the basic customer search screen.

   Customer Type to Default in Search
   > Select one of the following as default customer type: Consumer or Business.
   >
   > This option is enabled only if you select the basic or advanced customer search screens.

5. Click the **Save** icon to save your changes.

Chapter 71. Configure Customer Payment Method Rules

About this task

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

To configure customer display rules:

Procedure

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

Chapter 72. Configure Consumer Rules

About this task

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

To define a default consumer user role:

Procedure

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

    Field   **Description**

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

5. Click the **Save** icon to save your changes.

Chapter 73. Configure Customer Grades

About this task

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

To define customer grades:

Procedure

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

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

Chapter 74. Select Complexity Level Required for Sourcing Rules

About this task

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

To select the level of complexity required for sourcing rules:

Procedure

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

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

Chapter 75. Define Fulfillment Types

About this task

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

To define fulfillment types:

Procedure

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

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

Chapter 76. Define Order Sourcing Classifications

About this task

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

To define order sourcing classifications:

Procedure

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

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

Chapter 77. Define Types of Sourcing and Procurement Classifications

About this task

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

To define the types of sourcing and procurement classifications:

Procedure

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

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

Chapter 78. Define Scheduling Rules

About this task

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

To define scheduling rules:

Procedure

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

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

Chapter 79. Configure Landed Cost Computation Rules

About this task

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

To configure the rules of landed cost computation:

Procedure

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

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

Chapter 80. Configure Rules for Determining Forwarding or Transfers

About this task

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

To configure the rules that determine forwarding and transfers:

Procedure

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

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

Chapter 81. Define Node Groups

About this task

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

To define node groups:

Procedure

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

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

Chapter 82. Configure Sourcing Rules

About this task

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

To configure sourcing rules:

Procedure

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

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

Chapter 83. Define Node Groups for Transfers or Procurement

About this task

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

To define node groups for transfers or procurement:

Procedure

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

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

Chapter 84. Configure Sourcing Rules for Transfers or Procurement

About this task

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

To configure sourcing rules for transfers or procurement:

Procedure

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

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

Chapter 85. Configure Version-Specific Rules

About this task

As an advanced configuration, you can specify different values for rules based on the version of the application that is accessing the rule.

To configure version-specific rules:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Version-Specific Rules.
4. To configure the rules with the default values, select the Default Value option.

   To configure the rules based on a version-specific qualifier, select the Version-Specific Rule For Qualified Tag option and select a qualifier from the Qualifier drop-down list.
5. In the Rules For Displaying Fulfillment Summary Screens panel, select the type of Fulfillment Summary screen to be displayed, and select a scheduling rule from the Scheduling Rule For Additional Shipping Option drop-down list. Click the **Save** icon.
6. In the Rule For Enabling Tax Options For Business Customers panel, select the Change Tax Options for a business customer check box to enable users to change the tax options defined for a business customer. Click the **Save** icon.

   Note: If you have selected a qualifier, but have not configured any of the rule values, a message is displayed, indicating that the rule values are not configured for the qualifier.

Chapter 86. Configure Miscellaneous Scheduling and Reservation Rules

About this task

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

To configure miscellaneous scheduling and reservation rules:

Procedure

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

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

Chapter 87. Select Region Schema used for Order Promising

About this task

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

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

Procedure

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

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

Chapter 88. Override Promising Parameters for Individual Items

About this task

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

To override promising parameters for individual items:

Procedure

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

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

Chapter 89. Override Promising Parameters for Individual Nodes

About this task

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

To override promising parameters for individual nodes:

Procedure

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

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

Chapter 90. Configure Basic Rules for Payment Handling

About this task

You can configure general rules for payment handling.

To configure general rules for payment handling:

Procedure

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

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

Chapter 91. Configure Payment Rules

About this task

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

To configure payment rules:

Procedure

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

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

Chapter 92. Define Payment Types

About this task

You can define various tender types that your business accepts.

To define payment types:

To configure general rules for payment handling:

Procedure

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

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

Chapter 93. Define Credit Card Types

About this task

This configuration allows the configuring of different credit card types.

To configure credit card types:

To configure general rules for payment handling:

Procedure

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

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

   Field   Description

   Credit Card Type
   > Enter the type of the credit card.

   Short Description
   > Enter a short description of the credit card type.

   Long Description
   > Enter a long description of the credit card type.

4. Click the **Save** icon to save your changes.

Chapter 94. Configure Payment Failure Rules

About this task

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

To configure payment failure rules:

Procedure

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

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

   Field   Description

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

4. Click the **Save** icon to save your changes.

Chapter 95. Payment Processing Rules Determination

About this task

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

To configure the payment processing rules:

Procedure

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

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

Chapter 96. Configure Advanced Credit Card Rules

About this task

This configuration allows the configuring of different credit card rules.

To configure credit card rules:

Procedure

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

   Field   Description

   Use A Single Input Field For When Entering The Name On Card Information On A Credit Card In the User Interface
   > Check this box to use a single field for displaying or entering card name.

   Authorize Credit Cards Real Time On Draft Orders
   > Select Authorize Credit Cards Real Time On Draft Orders to process real time credit card authorizations before confirming draft orders.

   Do not Authorize Credit Cards In Real Time
   > Select Do not Authorize Credit Cards In Real Time to process credit card authorization at a later time, using payment collection and payment execution agents.

5. Click the **Save** icon to save your changes.

Chapter 97. Configure Order Entry Rules

About this task

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

To access the Order Entry Controller Wizard:

Procedure

1. From the Channel Applications Manager, select Configure Order Administration.

2. Under Configure Order Administration, select Configure Order Entry Rules. The Order Entry Rules screen displays the current configuration choices for order entry.

3. To change the current or default order entry configuration, click Change Configuration. As you make decisions, the wizard displays information in two panels: the left panel displays the current decision choices you can make and the right panel displays a summary of all of the configuration choices you have made.

4. Select the screen on which you want to start the order entry task. To display the Customer Identification screen first during order entry, select the Show Customer Identification Step First option. To display the Item Entry screen first during order entry, select the Show Item Entry Step First option.

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

5. In the Provide a default name to be used during order creation field, enter a name for the draft order. This name is automatically populated in the Confirm pop-up window that is displayed when a user attempts to close the Order Entry screen before completing the process of order creation.

6. Click Next.

   You are then prompted to indicate the type of Customer Search screen that should be displayed when identifying customers.

7. Select the Display Advanced Customer Search Screen option to display the advanced customer search screen.

8. Select the Display Address Search Screen option to display the address search screen.

9. Select the Display Basic Customer Search Screen option to display the basic customer search screen.

10. Click Next.

    If you select the Display Advanced Customer Search Screen option and click Next, you can select the appropriate tax options for a customer.

11. Click Next.

    You are prompted to specify the type of customer search you want to perform.

12. Click Next.

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

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

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

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

15. Click Next.

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

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

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

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

19. Click Next.

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

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

21. Select any one of the following options when entering items on an order:
    - If you want to enable pick up as the default option, choose the 'Default Pick Up' option.
    - If you want to enable shipping as the default option, choose the 'Default Shipping' option.
    - If you want to enable delivery as the default option, choose the 'Default Delivery' option. This option is enabled only if you check the Show Delivery as Separate Fulfillment Method box.

22. Click Next.

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

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

24. You can also configure where the focus of the cursor should shift to after adding an item to an order in the Add Item screen:
    - Select the Focus on the next Item ID entry field option to shift the focus of the cursor to the next Item ID field. This option should be selected when most of the order lines have a single unit per order line.
    - Select the Focus on the next enterable field (usually Quantity) option to shift the focus of the cursor to the next editable field. This option should be selected if you want to force the call center and store representatives to enter the quantity for each of the items entered in the order. This option is useful when the order lines have multiple quantities.

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

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

26. Click Next.

27. You can now configure to display the related items as a panel on the line entry screen or as a separate pop-up.
    - Select A Panel On The Line Entry Screen option to display the related items as a panel.
    - Select A Pop-up Window option to display the related items as a pop-up window.

28. Click Next.

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

29. To configure item association rules and relationship types:
    - Select the Show in UI check box to display the product items for that association type in the related items panel or pop-up.
    - From the Item Association drop-down list, select one of the following options:

      - Relate Item: In the Related Items pop-up window or the Related Items panel in the Add Items screen, if the user selects an item with the corresponding association type, the item will be added as an associated item of the original item in the order.

      - Replace Item: In the Related Items pop-up window or the Related Items panel in the Order Entry screen, if the user selects an item with the corresponding association type, the original item will be replaced with the associated item.

    - Select the Check Inventory check box to perform availability checks for the associated product item. If the inventory for the associated item is not available, the associated item will not be displayed in the related items panel or pop-up. If the check box is not selected, the associated item will be displayed in the panel or popup regardless of whether the inventory is available or not.

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

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

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

Chapter 98. Define Hold Types

An order can be put on hold for multiple reasons. In this configuration, a user can define various types of holds that can be associated to an order.

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

For more information about defining hold types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Chapter 99. Configure Price Match Rules

About this task

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

To configure price match rules:

Procedure

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

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

   Fields   Description

   Maximum Number Of Days After The Order Line Was Created To Allow Price Match
   Enter the maximum number of days after an order date to allow price matching of an item.

   Maximum No Hassle Unit Price Difference
   Enter the maximum unit price difference for an order to qualify for no hassle price matching.

   Maximum No Hassle Unit Price Difference (%)
   Enter the maximum unit price difference percentage for an order to qualify for no hassle price matching.

   Maximum No Hassle Line Quantity
   Enter the maximum item quantity for an order to qualify for no hassle price matching.

   Default Number Of Days For Price Matches To Expire
   Enter the default number days allowed to pass before a price match expires.

   Price Match Percentage Applied
   Enter the price match percentage applied to an order.

   Charge Category Representing Shipping Charges To Default On The Price Match Worksheet
   Select the default charge category to be used in the price match work sheet from the drop-down list.

   Price Match Recorded As
   Select one of the following: Change in Order Line's Unit Price or Discount Charge on Order Line.

   Charge Category
   Select the charge category as Price Match from the drop-down list.

   Charge Name
   Select the charge name from the drop-down list.

4. Click the **Save** icon to save your changes.

Chapter 100. Configure Order Modification Groups

About this task

You can configure the status modification groups for an order or order line based on the enterprise, process type, and order conditions.

To configure the order modification groups:

Procedure

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

   For more information about defining modification groups, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Chapter 101. Configure Work Order Modification Groups

About this task

Work orders are created for performing delivery and installation services.

To configure order modification groups:

Procedure

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

   For more information about defining modification groups, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Chapter 102. Define Appeasement Reasons

About this task

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

To define appeasement reasons:

Procedure

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

   Fields   Description

   Appeasement Reason
   > Enter a name for the appeasement reason.

   Short Description
   > Enter a short description of the appeasement reason.

   Long Description
   > Enter a more detailed description of the appeasement reason.

4. Click the **Save** icon to save your changes.

Chapter 103. Define Cancellation Reasons

About this task

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

To define cancellation reasons:

Procedure

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

   Fields   Description

   Cancellation Reason
   > Enter a name for the cancellation reason.

   Short Description
   > Enter a short description of the cancellation reason.

   Long Description
   > Enter a more detailed description of the cancellation reason.

4. Click the **Save** icon to save your changes.

Chapter 104. Define Reship Reasons

About this task

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

To define reship reasons:

Procedure

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

   Fields   Description

   Reship Reason
   > Enter a name for the reship reason.

   Short Description
   > Enter a short description of the reship reason.

   Long Description
   > Enter a more detailed description of the reship reason.

4. Click the **Save** icon to save your changes.

Chapter 105. Define Price Override Reasons

About this task

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

To define price override reasons:

Procedure

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

   Fields   Description

   Price Override Reasons
   Enter a name for the price override reason.

   Short Description
   Enter a short description of the price override reason.

   Long Description
   Enter a more detailed description of the price override reason.

4. Click the **Save** icon to save your changes.

Chapter 106. Define Charge Override Reasons

About this task

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

To configure charge override reasons:

Procedure

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

   Fields   Description

   Charge Override Reasons
   > Enter a name for the charge override reason.

   Short Description
   > Enter a short description of the charge override reason.

   Long Description
   > Enter a more detailed description of the charge override reason.

4. Click the **Save** icon to save your changes.

Chapter 107. Configure Open Box Options

About this task

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

To configure the handling options for open box items:

Procedure

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

   Fields   Description

   Allow Addition of Open Box Items to Orders
   > Check this box if you want to allow users to add open box items to an order.

   Tag Identifier for Open Box ID
   > Select the appropriate tag attribute from the drop-down list that identifies the open box items.

   > Note: This option is available only if you check the 'Allow Addition of Open Box Items to Orders' box.

   Product Class for Open Box Items
   > Select the appropriate product class from the drop-down list for the open box items.

   Fulfillment Methods Supported for Open Box Items
   > Check the boxes of the appropriate fulfillment method for open box items.

   > Pick Up—indicates to pick up open box items at a store.

   > Shipping—indicates to ship open box items.

   > Delivery—indicates to deliver open box items.

4. Click the **Save** icon to save your changes.

Chapter 108. Define Order Note Types and Configure Automatic Note Logging

About this task

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

To access this wizard:

Procedure

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

2. Select Define Note Types and Configure Automatic Note Logging. The Order History Notes Wizard screen displays the current configuration choices for order notes.

3. To change the current or default order entry configuration, click Change Configuration. As you make decisions, the wizard displays information in two panels: the left panel displays the current decision choices you can make and the right panel displays a summary of all of the configuration choices you have made.

4. This screen displays all the note types that have been configured. To add a note type:

   - Click the **Add** icon to add a new note type.

   - Enter information in the applicable fields. The following table describes the Note Types fields.

     Field   Description

     Note Reason
     > Enter a name for the Note Reason.

     Short Description
     > Enter a short description of the Note Reason.

     Long Description
     > Enter a more detailed description of the Note Reason.

   - Click the **Save** icon to save your changes.

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

5. Check the boxes of the hold types for which the note has to be automatically logged when the hold is added. Select the note type from the drop-down list. Enter the XSL translation file to be used.

6. Check the boxes of the hold types for which the note has to be automatically logged when the hold is resolved. Select the note type from the drop-down list. Enter the XSL translation file to be used.

7. Check the boxes of the hold types for which the note has to be automatically logged when the hold is rejected. Select the note type from the drop-down list. Enter the XSL translation file to be used.

8. On this screen you can enable notes to be automatically logged when an alert is raised against an order by checking the A new alert is raised against an order box. Select the note type from the drop-down list. Enter the XSL translation file to be used.

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

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

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

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

11. Check the An appointment is completed box to log notes automatically when an appointment is completed. Select the note type from the drop-down list. Enter the XSL translation file to be used.

12. Check the An appointment is failed box to log notes automatically when an appointment fails. Select the note type from the drop-down list. Enter the XSL translation file to be used.

13. On this screen you can select a service that will be executed when a note is logged against an order. Choose the service to be executed from the drop-down list.

14. Click the Finish button to close the Order Notes Wizard and save your settings.

Chapter 109. Define Order Types and Line Types

About this task

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

To define order types and line types:

Procedure

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

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

Chapter 110. Configure Order Validations Required

About this task

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

To configure the required order validations:

Procedure

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

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

Chapter 111. Configure Alternate Item Identifier Display

About this task

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

To configure alternate item identifier display:

Procedure

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

   Field   **Description**

   Store Alternate Item IDs on Order Lines
   > Select this box if you want to store the alternate item identifiers.
   >
   > This will allow you to scan the alternate item identifier and enhance the system to store and display.

   Item Alias to Use for Alternate Item ID
   > Select the appropriate item alias for the alternate item ID that identifies the original item from the drop down list. For more information about defining item alias types, see the *Catalog Management: Configuration Guide*.
   >
   > You can select the item alias only if the Store Alternate Item IDs on Order Lines rule is enabled.

5. Click the **Save** icon to save your changes.

Chapter 112. Configure Add Line Rules

About this task

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

To add line rules:

Procedure

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

   Field   **Description**

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

5. Click the **Save** icon to save your changes.

Chapter 113. Configure Available Gift Options

About this task

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

To configure the gift options:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to Configure Order Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Available Gift Options.
4. Select the Items Being Shipped check box to indicate that the items that have a fulfillment method of Shipment can be gift items.
5. Select the Items Being Picked Up check box to indicate that the items that have a fulfillment method of Pick Up can be gift items.
6. Select the Items Being Delivered check box to indicate that the items that have a fulfillment method of Delivery can be gift items
   - To set the gift options for delivery items at the work order level, select the Work Order Level option.
   - To set the gift options for delivery items at the order line level, select the Order Line Level option.
7. To enable gift wrapping for items, select the Allow Gift Wrapping Of Items check box.
8. Click the **Save** icon to save your changes.
9. When configuring gift options, ensure that you configure the "Change Mark For" and "Gift Flag Modifications" modification types in the Applications Manager.

Chapter 114. Configure Address Verification Rules

About this task

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

To configure address verification rules:

Procedure

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

Chapter 115. Configure Region and State Display Rules

Configure Country or Region

About this task

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

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

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

Procedure

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

Configure State Display

About this task

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

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

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

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

To configure the State drop-down list:

Procedure

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

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

5. Click the **Save** icon to save your changes.

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

Chapter 116. Define Instruction Types

About this task

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

To define the instruction types:

Procedure

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

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

Chapter 117. Define Custom Modification Types

About this task

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

To define the custom modification types:

Procedure

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

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

Chapter 118. Configure which Modifications Trigger Re-pricing

About this task

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

To configure the modifications that trigger quote re-pricing:

Procedure

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

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

Chapter 119. Configure Transaction Specific Rules

About this task

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

To configure transaction specific rules:

Procedure

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

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

Chapter 120. Define Charge Categories and Names

About this task

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

To define the charge categories and names:

Procedure

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

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

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

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

Chapter 121. Configure Availability Check and Reservation Options

About this task

You can specify when availability checks and item reservations occur.

To configure the availability check and reservation options:

Procedure

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

   Field   Description

   Prevent Initial Availability Checks During Order Entry and Order Modifications. Availability Checks Will Be Performed Only on the Alternate Stores and Fulfillment Summary Screens
   > Check this box to perform an availability check in the Alternate Stores and Fulfillment Summary screens.

   Prevent Availability Check When Searching for Items
   > Check this box to prevent an availability check when searching for an item.

   Reserve Items During Order Entry and Order Modifications
   > Check this box to reserve items when entering or modifying an order.

   Get Real Time Inventory For All The Child Items
   > Choose this option to perform an availability check when opening the Style Items pop-up window.

   Get Cached Inventory For All The Child Items For Distribution Group ID
   > Choose this option and select the required distribution group ID from the drop-down list to perform an availability check of all the child items for the selected distribution group ID.

5. Click the **Save** icon to save your changes.

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

Chapter 122. Define Unit of Measure Display Rules

About this task

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

To define the unit of measure display values:

Procedure

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

   Field   Description

   The Unit Of Measure In Which The Order Was Placed
   > Choose this option to display the order line UOM as it is specified on the order.

   The Unit Of Measure In Which Inventory Is Stored
   > Choose this option to display the order line UOM as it is maintained for the item in inventory.

   Do Not Show Unit of Measure
   > Choose this option to not display the UOM of an order line.
5. Click the **Save** icon to save your changes.

Chapter 123. Configure Print Options

About this task

You can specify when an order invoice is printed.

To configure order invoice print options:

Procedure

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

   Field   Description

   Automatically Printing
   > Choose this option to automatically print a change order slip after each order.

   Prompting the User to Print
   > Choose this option to prompt the user to print a change order slip after every order modification.

   Never Printing
   > Choose this option to never prompt the user and never automatically print a change order slip.
5. Click the **Save** icon to save your changes.

Chapter 124. Configure User Interface Payment Handling

About this task

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

To configure external payment options:

Procedure

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

   Field   Description

   Payment is External to the Call Center
   Select this box to specify that IBM Sterling Call Center and IBM Sterling Store handles payments externally to the Call Center.

   When this option is selected, IBM Sterling Call Center and IBM Sterling Store does not prompt the user to enter payment information when creating or modifying an order at the call center. It is assumed that the payment is handled in the store or by an external system such as a point-of-sale system.

   Note: If you check this box, ensure to check the "Payment is External to the Store" box.

   Payment is External to the Store
   Select this box to specify that IBM Sterling Call Center and IBM Sterling Store handles payments externally to the Store.

   When this option is selected, IBM Sterling Call Center and IBM Sterling Store does not prompt the user to enter payment information when creating or modifying an order in the store. It is assumed that the payment is handled at the call center or by an external system such as a point-of-sale system.

5. Click the **Save** icon to save your changes.

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

Chapter 125. Configure Special Order Modification Rules

About this task

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

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

Procedure

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

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

5. Click the **Save** icon to save your changes.

Chapter 126. Configure Information Recorded During Level of Service Selection

About this task

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

To enable users to record committed dates:

Procedure

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

   Field   Description

   Save committed dates on the line
   Check this box to use the committed date for the order.
4. Click the **Save** icon to save your changes.

Chapter 127. Configure Line Relationship Type

About this task

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

To configure line relationship type:

Procedure

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

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

Chapter 128. Configure FTC Compliance

About this task

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

Procedure

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

   Field   Description

   Default First Promise Date (days)
   > Enter the number of days after the order date that the first promise date will be set to, if no promise date has been given to the customer. This value must be a positive integer that is less than 30.

   Default Cancel Date (days)
   > Enter the number of days after first promise date to set the cancel date to, when a delay is found. This delay can be more than 30 days or an indefinite delay. The cancel date is the date when the order will be automatically cancelled if the customer does not respond. This value must be a positive integer that is less than 5.

   Process Buffer Time (hours)
   > Enter the number of hours by which to extend the promise date in order to consider process constraints, such as small carrier or warehouse processing delays that cannot be taken into account in advance. If a shipment is delayed within this configured value of hours, no notification will be sent. If, at any time, the delay becomes greater than this configured value, a notification will be sent. This value must be less than 72 hours.

   Cancel Reason Code
   > Enter the cancellation reason code that will be used when a line is cancelled in order to comply with FTC regulations.
5. Click the **Save** icon to save your changes.

Chapter 129. Configure Price Match Statuses

About this task

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

To configure price match status:

Procedure

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

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

   Fields Description

   Price Match Status
   > Indicates the status for the price match.

   Short Description
   > Enter a short description of the price match status.

   Long Description
   > Enter a more detailed description of the price match status.

5. Click the **Save** icon to save your changes.

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

Chapter 130. Configure Competitor Statuses

About this task

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

To configure competitor status:

Procedure

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

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

   Fields   Description

   Competitor Status
   >   Indicates the status of the competitor.

   Short Description
   >   Enter a short description of the competitor status.

   Long Description
   >   Enter a more detailed description of the competitor status.

5. Click the **Save** icon to save your changes.

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

Chapter 131. Configure Bundle Components Display

About this task

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

To configure the display of bundle components:

Procedure

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

   Field   Description

   Display Component Items For Bundles In Summary Screens
   Select this check box to display bundle components on the Order Summary, Return Summary, and Shipment Summary screens, and the Order Pricing Summary pop-up window.

   By default, this option is cleared for all enterprises.
5. Click the **Save** icon to save your changes.

Chapter 132. Configure External User Interface Rules

About this task

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

Procedure

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

   Note: Ensure that the IP address that you enter is same as the BaseURL that is specified in the locations.ycfg file. For more information about launching the Application Console from within the IBM Sterling Call Center and IBM Sterling Store applications, see the *Sterling Call Center: Deployment Guide* and *Sterling Store: Deployment Guide* respectively.
5. Click the **Save** icon to save your changes.

Chapter 133. Configure Display of Fulfillment Summary Screen

About this task

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

To configure the display of fulfillment summary screen:

Procedure

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

Chapter 134. Configure Order Tags for Sales Orders

About this task

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

To configure the order tags for sales orders:

Procedure

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

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

Chapter 135. Configure Quote Entry Rules

About this task

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

To configure the quote entry rules:

Procedure

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

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

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

Chapter 136. Defining Quote Hold Types

A quote can be put on hold for multiple reasons. In this configuration, you define various types of holds that can be associated with a quote. You also configure the behavior of other system functions when the quote is on hold.

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

For more information about defining hold types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Chapter 137. Configure Quote Modification Groups

About this task

You can configure the status modification groups for a quote or quote line based on the enterprise, process type, and order conditions.

To configure quote modification groups:

Procedure

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

   For more information about defining modification groups, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Chapter 138. Define Quote Abandonment Reasons

About this task

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

To define a quote abandonment reason:

Procedure

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

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

Chapter 139. Configure Quote Approval Plans

About this task

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

To configure the quote approval plans:

Procedure

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

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

Chapter 140. Configure Quote Approval Rule Violation Reasons

About this task

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

To configure the quote approval rule violation reasons:

Procedure

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

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

Chapter 141. Define Quote Note Types and Configure Automatic Note Logging

About this task

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

To define quote note types and configure automatic note logging:

Procedure

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

   The Quote Audit Notes screen containing the current configuration choices for the quote notes is displayed.
4. To change the current or default quote entry configuration, click **Change Configuration**.

   The Quote Audit Note Wizard is displayed. The wizard displays information in two panels: the left panel displays the existing note reasons, and the right panel displays a summary of all of the note reasons you have configured.
5. To add a note reason type:
   a. Click the **Create New** icon.
   b. Enter information in the applicable fields. The following table describes the fields in the Note Reason Details dialog box.

      Field   Description

      Note Reason
              Enter a name for the note reason.

      Short Description
              Enter a short description for the note reason.

      Long Description
              Enter a more detailed description for the note reason.

   c. Click the **Save** icon to save your changes.

      After configuring the note reason type, you can choose when you want the notes to be automatically logged.
6. Click **Next**.
7. In the Create Quote panel, perform the following steps:
   a. Select **A quote is created** check box for a note to be automatically logged when a quote is created.
   b. Select the **Note Type** from the drop-down list.
   c. Enter the **XSL Translation File** to be used.
8. In the **Convert Quote To Order** panel, perform the following steps:
   a. Select **A quote is converted to order** check box for a note to be automatically logged when a quote is converted to an order.

b. Select the **Note Type** from the drop-down list.

c. Enter the **XSL Translation File** to be used.

9. Click **Next**.

10. In the Quote Presented To Customer panel, perform the following steps:

a. Select **A quote is presented to customer** check box for a note to be automatically logged when the related quote is presented to a customer.

b. Select the **Note Type** from the drop-down list.

c. Enter the **XSL Translation File** to be used.

11. In the Quote Sent For Approval panel, perform the following steps:

a. Select **A quote is sent for approval** check box for a note to be automatically logged when the related quote is sent to the customer for approval.

b. Select the **Note Type** from the drop-down list.

c. Enter the **XSL Translation File** to be used.

12. Click **Next**.

13. From the **Service to Execute** drop-down list, select a service that will be executed when a note is logged against a quote.

14. Click **Finish** to close the Quote Audit Notes Wizard and save your settings.

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

Chapter 142. Configuring Proposal Templates

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

Add a Proposal Template

About this task

To add a proposal template:

Procedure

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

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

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

   Field   Description

   Proposal Template
   > Enter a name for the proposal template. This is the name that is displayed in IBM Sterling Field Sales. This name should contain the service name that is used to generate the corresponding proposal template.

   Short Description
   > Enter a short description for the proposal template. The text entered in this field is displayed on the user interface.

   Long Description
   > Enter a more detailed description for the proposal template.
6. Click the **Save** icon to save your changes.

Modify a Proposal Template

About this task

To modify a proposal template:

Procedure

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

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

4. Select the proposal template you want to modify.

5. Click the **Details** icon. Alternatively, right-click and select **Details**.

   The Proposal Template Details dialog box is displayed.

6. Enter the information in the applicable fields.

   Note: The **Proposal Template** name cannot be modified.

7. Click the **Save** icon to save your changes.

Delete a Proposal Template

About this task

To delete a proposal template:

Procedure

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

2. Click the Advanced Configurations link.

3. Select **Configure Proposal Templates**.

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

4. Select the proposal template you want to delete.

5. Click the **Delete** icon. Alternatively, right-click and select **Delete**.

6. The Confirmation dialog box with the message *Are you sure you want to delete this record?* is displayed. Click **Yes**.

   The proposal template is deleted.

Chapter 143. Configuring Proposal Formats

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

- Portable Document Format
- Rich Text Format

Add a Proposal Format

About this task

To add a proposal format:

Procedure

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

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

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

   Field   **Description**

   Format Type
   > Enter a name for the format type. This is the name that is displayed in IBM Sterling Field Sales. This name should contain the format in which the output should be generated. For example, to generate the output in PDF format, enter the Format Type as PDF.

   Short Description
   > Enter a short description for the print format. The text entered in this field is displayed on the user interface.

   Long Description
   > Enter a more detailed description for the print format.
6. Click the **Save** icon to save your changes.

Modify a Proposal Format

About this task

To modify a proposal format:

Procedure

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

2. Click the Advanced Configurations link.

3. Select **Configure Proposal Formats**.

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

4. Select the print format you want to modify.

5. Click the **Details** icon. Alternatively, right-click and select **Details**.

   The Format Type Details dialog box is displayed.

6. Enter the information in the applicable fields.

   Note: The **Format Type** name cannot be modified.

7. Click the **Save** icon to save your changes.

Delete a Proposal Format

About this task

To delete a proposal format:

Procedure

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

2. Click the Advanced Configurations link.

3. Select **Configure Proposal Formats**.

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

4. Select the print format you want to delete.

5. Click the **Delete** icon. Alternatively, right-click and select **Delete**.

6. The Confirmation dialog box with the message *Are you sure you want to delete this record?* is displayed. Click **Yes**.

   The proposal format is deleted.

Chapter 144. Define Quote Types and Line Types

About this task

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

To define quote types and line types:

Procedure

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

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

Chapter 145. Configure Quote Validations Required

About this task

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

To configure the required quote validations:

Procedure

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

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

Chapter 146. Define Quote Instruction Types

About this task

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

To define the quote instruction types:

Procedure

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

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

Chapter 147. Define Custom Quote Modification Types

About this task

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

To define custom quote modification types:

Procedure

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

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

Chapter 148. Configuring which Modifications Trigger Re-pricing

About this task

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

To configure the modifications that trigger re-pricing:

Procedure

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

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

Chapter 149. Define Charge Categories and Names

About this task

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

To configure basic rules for payment handling:

Procedure

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

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

Chapter 150. Configure Payment Terms

About this task

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

To configure the payment terms:

Procedure

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

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

Chapter 151. Configure Financial Rules

About this task

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

To configure the financial rules:

Procedure

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

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

Chapter 152. Configure Line Relationship Type

About this task

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

To configure a line relationship type:

Procedure

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

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

Chapter 153. Configure Order Tags for Quotes

About this task

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

To configure the order tags for quotes:

Procedure

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

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

Chapter 154. Configuring Transaction Specific Rules

About this task

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

To configure transaction specific rules:

Procedure

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

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

Chapter 155. Configure Quote Expiration and Recommended Item Rules

About this task

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

To configure the quote expiration and recommended item rules:

Procedure

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

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

Chapter 156. Define Opportunity Note Reasons

About this task

This configuration allows you to define note reasons for quote.

To define opportunity note reasons:

Procedure

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

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

Chapter 157. Define Opportunity Lead Origins

About this task

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

To define opportunity lead origins:

Procedure

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

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

Chapter 158. Define Opportunity Lost Reasons

About this task

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

To define opportunity lost reasons:

Procedure

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

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

Chapter 159. Configure Store Pick Up Rules

About this task

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

To configure store pick up rules:

Procedure

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

   Field   Description

   Allow Pick Up
   Select this box to allow users to see store pick up options.

   Distance Radius to Consider When Finding Nearby Stores
   Enter a number to determine the radius to consider when finding nearby stores.

   Distance Radius to Consider When Finding More Stores
   Enter a number to determine the radius to consider when finding more stores.

   Distance UOM
   Select from the drop-down list the unit of measurement to use when defining the distance radius.

   Standard Search Fulfillment Type
   Select the standard search fulfillment type from the drop-down list. When this option is selected, the application will use this fulfillment type when searching for item availability in the Alternate Stores Search screen. This fulfillment type is used in a sourcing rule that determines the correct set of nodes to consider. For example, you may specify a fulfillment type that corresponds to a sourcing rule representing all nodes of the type 'store'. This ensures that all store nodes are considered when searching for alternate stores.

   Extended Search Fulfillment Type
   Select the extended search fulfillment type from the drop-down list. When this option is selected, the application will use this fulfillment type when performing an extended stores search in the Alternate Store Search screen. This fulfillment type is used in a sourcing rule that determines the correct set of nodes to consider for an extended store search. For example, you may specify a fulfillment type that corresponds to a sourcing rule representing all nodes of type 'store', including distribution centers that allow customer pick up.

Display Available Quantity On Alternate Stores Popup

Select this check box to view the available quantity in the Display Near-By Stores pop-up window of the Sterling Call Center and Sterling Store applications.

Display Nearby Store Availability Panel In Store Mode

Select one of the following options:

*   Display Nearby Stores Availability Panels In Store Mode on Item Details Page.

    If you select this option, in the Sterling Store application, the item available quantity for the selected country or region and postal code is displayed.

*   Do Not Display Nearby Stores Availability Panels In Store Mode on Item Details Page.

    If you select this option, in the Availability panel of the Sterling Store application, the View Nearby Stores For Availability link is displayed.

For more information about viewing product item details, see the *Sterling Call Center: User Guide* and *Sterling Store: User Guide*.

4. Click the **Save** icon to save your changes.

Chapter 160. Configure Verification Criteria

About this task

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

To configure verification criteria:

Procedure

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

   Field   **Description**

   Customer Verification Type
   > Indicates the customer verification type.

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

   Long Description
   > Enter a more detailed description of the customer verification type.
5. Click the **Save** icon to save your changes.

Chapter 161. Define Carriers

About this task

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

To define a carrier:

Procedure

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

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

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

Chapter 162. Define Carrier Services

About this task

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

To define a carrier service:

Procedure

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

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

Chapter 163. Define Types of Routing Guide Classifications

About this task

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

To define the types of routing guide classifications:

Procedure

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

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

Chapter 164. Configure Outbound Constraints

About this task

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

To configure outbound constraints:

Procedure

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

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

Chapter 165. Define Shipment Modes

About this task

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

To define a shipment mode:

Procedure

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

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

Chapter 166. Configure Outbound Shipment Modification Groups

About this task

You can configure the status modification groups for a shipment or shipment line based on the enterprise, process type, and order conditions.

To configure the outbound shipment modification groups:

Procedure

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

   For more information about configuring outbound shipment modification groups, see the *Sterling Selling and Fulfillment Foundation: Logistics Management Configuration Guide*.

Chapter 167. Configure Order Fulfillment Process

About this task

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

Chapter 168. Configure Shipping Process

About this task

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

Chapter 169. Configure Delivery and Installation Process

About this task

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

Chapter 170. Configure Return Fulfillment Process

About this task

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

Chapter 171. Configure Quote Fulfillment Process

About this task

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

To configure the quote fulfillment process:

Procedure

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

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

Chapter 172. Configure Opportunity Fulfillment Process

About this task

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

To configure the opportunity fulfillment process:

Procedure

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

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

Chapter 173. Configure Receipt Process

About this task

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

Chapter 174. Define Order Milestones

About this task

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

Chapter 175. Define Order Monitoring Events

About this task

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

Chapter 176. Define Milestones for Returns

About this task

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

Chapter 177. Define Monitoring Events for Returns

About this task

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

Chapter 178. Define Quote Milestones

About this task

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

To define the quote milestones:

Procedure

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

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

Chapter 179. Define Monitoring Events for Quotes

About this task

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

To define the monitoring events for quotes:

Procedure

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

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

Chapter 180. Configure Transactions and Events for Inventory, Item, and UI

About this task

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

Chapter 181. Configure Document Types and Process Types

About this task

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

Chapter 182. Configure Inventory Related Rules

About this task

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

To configure the inventory related rules:

Procedure

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

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

Chapter 183. Configure Supply and Demand Types

About this task

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

To configure the supply and demand types:

Procedure

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

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

Chapter 184. Configure Availability Safety Factors

About this task

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

To configure the safety factors:

Procedure

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

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

Chapter 185. Configure how Supply and Demand are Changed with Order Status

About this task

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

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

Procedure

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

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

Chapter 186. Configure Inventory Node Type Rules

About this task

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

To configure inventory node type rules:

Procedure

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

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

Chapter 187. Configure Return Order Modification Groups

About this task

You can configure the status modification groups for a return order or return order line based on the enterprise, process type, and order conditions.

To configure the return order modification groups:

Procedure

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

   For more information about defining modification groups, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics Configuration Guide*.

Chapter 188. Define Return Reasons

About this task

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

To define return reasons:

Procedure

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

   Field   Description

   Return Reasons
   > Enter a name for the return reason.

   Short Description
   > Enter a short description of the return reason.

   Long Description
   > Enter a more detailed description of the return reason.

   RE-price Sales Order
   > Check this to reprice the sales order with the reduced qty.

4. Click the **Save** icon to save your changes.

Chapter 189. Define Charge Override Reasons

About this task

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

To configure charge override reasons:

Procedure

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

    Fields   Description

    Charge Override Reasons
    Enter a name for the charge override reason.

    Short Description
    Enter a short description of the charge override reason.

    Long Description
    Enter a more detailed description of the charge override reason.

4. Click the **Save** icon to save your changes.

Chapter 190. Define Receiving Disposition Codes

About this task

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

To configure receiving disposition codes:

Procedure

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

   Field   Description

   Receiving Disposition
   > Enter a name for the receiving disposition.

   Short Description
   > Enter a short description of the receiving disposition.

   Product Class
   > Select a product class for the receiving disposition.

   Damaged
   > Check this box to indicate that the disposition is for damaged items.

   Final Disposition
   > Check this box to indicate that the disposition is a final disposition.

4. Click the **Save** icon to save your changes.

Chapter 191. Configure Rules for Wrongly Shipped Items

About this task

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

To configure rules for wrongly shipped items:

Procedure

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

   Field   Description

   Drop-down list for Default Reship Reason for Wrongly Shipped Items
   > Select among the reship reasons displayed in the drop-down list. For more information, see *Define Reship Reasons*

   Check box for Allow Creation of Return for Unknown Items
   > Select this check box to enable a CSR to return unknown items.

   Use Item field
   > Enter the temporary item ID that will be used to identify unknown items until these items can be identified during receiving.

4. Click the **Save** icon to save your changes.

Chapter 192. Configure Return Entry Rules

About this task

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

To configure return entry rules:

Procedure

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

   Field   **Description**

   Override Return Policy Note Type
   > The note type used when overriding the return policy. The default is Return Policy Overridden, which, when enabled, allows users to override the return policy. For more information about configuring return note reasons, see *Define Return Note Reasons*

   Default Exchange Type
   > This specifies what your enterprise defaults to as the exchange type: REGULAR, ADVANCED, or PREPAID.
   >
   > The default exchange type for the enterprise is REGULAR.

   Allow End Users to Modify the Exchange Type on an Exchange Order
   > Enables users to access and change the Exchange Type.

   Display Reshipped Items During Return Entry by Default
   > When this check box is selected, reshipped lines are displayed when the screen loads.

   Allow Return of Items without an Order
   > Enables customers to return items without an order.
   >
   > When this check box is selected, the Items without an order tab is displayed on the line selection screen.

4. Click the **Save** icon to save your changes.

Chapter 193. Define Return Note Reasons

About this task

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

To define return notes reasons:

Procedure

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

   Field   Description

   Note Reason
   > Enter a name for the note reason.

   Short Description
   > Enter a short description of the note reason

   Long Description
   > Enter a more detailed description of the note reason.

4. Click the **Save** icon to save your changes.

Chapter 194. Define Return Cancellation Reasons

About this task

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

To configure return cancellation reasons:

Procedure

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

   Field   Description

   Cancellation Reason
   　　　Enter a name for the cancellation reason.

   Short Description
   　　　Enter a short description of the cancellation reason

   Long Description
   　　　Enter a more detailed description of the cancellation reason.

4. Click the **Save** icon to save your changes.

Chapter 195. Define Return Types and Return Line Types

About this task

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

Chapter 196. Configure Return Receipt Handling

About this task

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

Chapter 197. Define Charge Categories and Names

About this task

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

Chapter 198. Configure Extraneous Item/Wrong Item Rules

About this task

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

To configure extraneous and wrong item rules:

Procedure

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

   Field   Description

   Line Types to Be Used For Extraneous Items
   > Define a line type for extraneous returns.

   Line Types to Be Used For Wrongly Shipped Items
   > Define a line type for wrongly shipped items.

5. Click the **Save** icon to save your changes.

Chapter 199. Define Alert Types

About this task

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

To define alert types:

Procedure

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

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

Chapter 200. Define Alert Queues

About this task

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

To define alert queues:

Procedure

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

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

Chapter 201. Configure User Alert Notifications

About this task

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

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

To configure the user alert notifications:

Procedure

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

   Field   **Description**

   Notify User Whenever an Alert is Assigned to the Current User
   Select this to notify the current user that an alert assigned.

   If this option is chosen, you must set the time interval (in minutes) for the application to search for new alerts. The default time is set to 5 minutes.

   Notify Users Whenever an Alert is Added to a Queue the User is Subscribed To   Select this to notify users about an alert added to a queue to which that user is subscribed.

   If this option is chosen, you must set the time interval (in minutes) for the application to search for new alerts. The default time is set to 5 minutes.

   By default, this option is selected.

   Never Notify Users About Alerts
   Select this if you do not want to notify users about alerts.

   Search Alerts only for store logged in
   Select this option to search alerts only for the store logged in

   Polling Interval in Minutes
   Enter the polling interval in minutes to poll for new alerts for which users need to be notified. The polling interval should be a valid number between 1 and 99,999.

4. Click the **Save** icon to save your changes.

Chapter 202. Define User Roles

About this task

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

To define user roles:

Procedure

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

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

Chapter 203. Defining Users

Defining Users for a Call Center

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

Users   **Menu Description**

All Users
　　Default Menu

Defining Users for a Store

The following table describes the menu description for store users.

Users   **Menu Descriptions**

All Users
　　Default Store Menu

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

Chapter 204. Configure Teams

About this task

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

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

Chapter 205. Define Rules for Password Policies

About this task

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

Chapter 206. Configure Policy Parameters

About this task

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

Chapter 207. Define Password Authentication Questions

About this task

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

Chapter 208. Configure Password Policy Rules

About this task

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

Chapter 209. Configure System Purge Criteria

About this task

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

To configure the system purge criteria:

Procedure

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

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

Chapter 210. Configure Sales Order Purge Criteria

About this task

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

To configure the sales order purge criteria:

Procedure

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

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

Chapter 211. Configure Work Order Purge Criteria

About this task

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

To configure the work order purge criteria:

Procedure

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

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

Chapter 212. Configure Return Order Purge Criteria

About this task

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

To configure return order purge criteria:

Procedure

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

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

Chapter 213. Configure Quote Purge Criteria

About this task

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

To configure the purge quote criteria:

Procedure

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

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

Chapter 214. Configure Opportunity Purge Criteria

About this task

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

To configure the purge quote criteria:

Procedure

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

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

Chapter 215. Define Agent Criteria Groups

About this task

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

To define agent criteria groups:

Procedure

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

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

Chapter 216. Define Initial Context Factory Codes

About this task

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

To define initial context factory codes:

Procedure

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

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

Chapter 217. Define View Servers

About this task

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

To define view servers:

Procedure

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

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

Chapter 218. Configure Health Monitor Rules

About this task

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

To configure health monitor rules:

Procedure

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

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

Chapter 219. Configure Pagination Rules

About this task

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

To configure the pagination rules:

Procedure

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

   Field   **Description**

   Automatically Search For History Orders When No Non-History Orders Have Been Found In the Order Search Screen
   > Select this option to search for history records when non-history records are not found in the Order Search screen.

   Never Display The Total Number Of Records
   > Select this option not to display the total number of records.

   Always Display The Total Number Of Records
   > Select this option to display the total number of records.

   Allow The User To Request The Display The Total Number Of Records
   > Select this option to allow to user to request for the display the total number of records.

5. Click the **Save** icon to save your changes.

Chapter 220. Configure Announcement Rules

About this task

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

To configure the announcement rules:

Procedure

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

Chapter 221. Define Qualified Tag Type

About this task

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

To define a qualified tag type:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Define Qualified Tag Type.

   For more information about defining qualified tag types, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 222. Define Qualified Tags

About this task

As an advanced configuration, you can define a list of Qualified Tags for the rules and common codes pertaining to a particular version of the IBM Sterling Call Center and IBM Sterling Store application. You can associate one or more qualified tags with a particular Qualified Tag Type.

To define a qualified tag:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Define Qualified Tag.

   For more information about defining Qualified Tags, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 223. Configure Qualified Tag and Application Compatibility

About this task

As an advanced configuration, you can associate the Installed Application Code and Application Version with a particular Qualified Tag.

To configure qualified tag and application compatibility:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Qualified Tag and Application Compatibility.

   For more information about configuring the qualified tag and application compatibility, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 224. Configure Version-Specific Rules

About this task

As an advanced configuration, you can specify different values for rules based on the version of the application that is accessing the rule.

To configure version-specific rules:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Version-Specific Rules.
4. To configure the rules with the default values, select the Default Value option.

   To configure the rules based on a version-specific qualifier, select the Version-Specific Rule For Qualified Tag option and select a qualifier from the Qualifier drop-down list.
5. In the Rules For Displaying Fulfillment Summary Screens panel, select the type of Fulfillment Summary screen to be displayed, and select a scheduling rule from the Scheduling Rule For Additional Shipping Option drop-down list. Click the **Save** icon.
6. In the Rule For Enabling Tax Options For Business Customers panel, select the Change Tax Options for a business customer check box to enable users to change the tax options defined for a business customer. Click the **Save** icon.

   Note: If you have selected a qualifier, but have not configured any of the rule values, a message is displayed, indicating that the rule values are not configured for the qualifier.

Chapter 225. Configure Version-Specific Common Codes for Sales Orders

About this task

As an advanced configuration, you can specify different values for the common codes based on the version of the application.

To configure version-specific common codes:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Version-Specific Common Codes for Sales Orders.
4. Click the **Create New** icon to add a new cancellation reason.
5. Enter information in the applicable fields. The following table describes the fields in the Common Code Details window: Click the **Save** icon.

   Field   Description

   Qualified Tag Id

         Select a Qualifier Tag ID from the drop-down list.

   Cancellation Reason

         Enter a cancellation reason.

   Short Description

         Enter a short description for the cancellation reason.

   Long Description

         Enter a long description for the cancellation reason.

Chapter 226. Configure Version-Specific Common Codes for Return Orders

About this task

As an advanced configuration, you can specify different values for the common codes based on the version of the application.

To configure version-specific common codes:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to System Administration to expand the branch.
2. Click the Advanced Configurations link.
3. Click Configure Version-Specific Common Codes for Return Orders.
4. Click the **Create New** icon to add a new cancellation reason.
5. Enter information in the applicable fields. The following table describes the fields in the Common Code Details window: Click the **Save** icon.

   Field   Description

   Qualified Tag Id
   > Select a Qualifier Tag ID from the drop-down list.

   Cancellation Reason
   > Enter a cancellation reason.

   Short Description
   > Enter a short description for the cancellation reason.

   Long Description
   > Enter a long description for the cancellation reason.

Chapter 227. Configure Region Schema

About this task

You can define the region schema the organization you are configuring uses for selling.

To define region schema:

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to **Configure Pricing Administration** to expand the branch.
2. Select **Configure Region Schema**.

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

Chapter 228. Configure Pricing Organization Rules

About this task

You can configure the rules that are defined by the pricing organization. These rules affect how the pricing engine calculates prices. In addition, this section describes the rules that affect the Pricing Administration user interface in IBM Sterling Business Center.

To define pricing organization rules:

Procedure

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

   For more information about defining pricing organization rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Chapter 229. Configure Pricing Enterprise Rules

About this task

You can configure the rules that are defined by the enterprise of the pricing organization. These rules control the behavior of the price list selection based on assignments.

To define pricing enterprise rules:

Procedure

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

   For more information about defining pricing enterprise rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Chapter 230. Configure User Exit Management

About this task

You can configure user exits to enable business logic extensions to the various transactions. The transactions invoke user exits so that you may plug-in custom logic by implementing these pre-defined user exits. For more information about defining user exit implementations, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 231. Customize the Application Menus

About this task

You can define menus to allow users to view them after logging into the application. For more information about defining menus, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 232. Define Extended Application Resources

About this task

You can define new resources that you can use to enable your extended components that are permission-controlled. When you create a resource, you can grant or revoke permission to this resource through the user role configuration. For more information about defining resources, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

The reference implementation provides transactional and configurational data to demonstrate the functionality of all the features. Additionally, you can use the data provided in the reference implementation as a starting point for your implementation. Although the data provided needs to be used exactly as it is given, it helps you understand how to configure the application to suit your business needs.

Chapter 233. Define Themes

About this task

You can define new color themes that are used in the IBM Sterling Selling and Fulfillment Foundation Console and the Applications Manager screens. For more information about defining themes, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 234. Define Custom Common Code Types

About this task

You can configure custom common code types for your application. Common codes are values that enable a user to choose from options rather than having to enter the data manually. For more information about defining custom common code types, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide.*

Chapter 235. Define Custom Common Codes

About this task

You can configure common code values for the custom common code types for your application. For more information about defining custom common code values, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 236. Define Custom Error Codes

About this task

You can define custom error codes and the descriptions to be used along with the default error codes. For more information about defining custom error codes, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*

Chapter 237. Define Store Users

About this task

You can define the user of a store belonging to the Enterprise. A user is a single person assigned with a certain task, such as Hub Administrator or store manager, depending on what role the user plays in the organization. For more information about defining users, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 238. Configure Store Devices

About this task

You can configure store devices such as printers, weighing scale, and so forth. For more information about defining a device type, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 239. Configure Store Print Documents

About this task

You can configure the print documents pertaining to a store such as receiving worksheet, cycle count worksheet, and so forth. For more information about defining print documents, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 240. Configure Data Security

About this task

As an advanced configuration, you can control access to data by the users. If a user is not associated with a data security group, the user is considered to have default access. For more information about defining data security groups, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 241. Configure Barcodes

About this task

As an advanced configuration, you can configure barcodes which are machine-readable symbols comprising black-and-white patterns of bars and stripes, or in some cases checkerboard-like grids. Bits of information are encoded within barcodes. This data is read by barcode scanners, and is often used in conjunction with databases. For more information about defining barcodes, see the *Sterling Store Inventory Management: Configuration Guide*.

Chapter 242. Configure Backroom Pick Rules

About this task

As an advanced configuration, you can specify if the shipment should move to the Ready for Backroom Pick status in the shipment pipeline.

To configure a backroom pick rule:

Procedure

1. From the Channel Applications Manager, select Store-Specific Tasks.
2. Select the Advanced Configuration link.
3. Select Configure Backroom Pick Rules. The Load Store Configuration pop-up screen is displayed. Select the store from the drop-down list and click OK. The Backroom Pick Required screen is displayed.
4. Select either one of the following check boxes to determine the shipment fulfillment method:
   - Select the Pick Up check box if the shipment will be picked by the customer.
   - Select the Shipping check box if the shipment will be shipped to a customer or a store.

   The shipment status changes to Ready for Backroom Pick only if a check box is selected.
5. Click the Save icon to save your changes.

Chapter 243. Configuring the Return Order Receiving Preferences

About this task

You can configure the return order receiving preferences pertaining to a store.

A receiving preference identifies the characteristics of return shipments and provides guidelines to the execution transactions.

Create a Receiving Preference for Return Order

About this task

You can create a receiving preference for a return order

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to **Store-Specific Tasks** to expand the branch.
2. Click **Configure Return Order Receiving Preferences**. The Receiving Preferences : Return Order window displays.
3. Enter information in the applicable fields. Refer to the Receiving Preferences : Return Order Window table for field value descriptions.
4. Choose the **Save** icon.

Description of Receiving Preferences : Return Order Window

Table 2. Receiving Preferences : Return Order Window

Field	Description
Shipment Entry Allowed	Select if shipment entry is to be created when a particular shipment is not available on the system. Allow Shipment Entry" enables the system to automatically create a shipment entry in the system, if a shipment entry does not exist when a "Start Receipt" operation is performed. On creation and confirmation of the shipment, the "Include in Receipt" transaction is invoked, to enable the receiving process to be carried out on this receipt. Warehouses that receive shipment information in fax or email form can manually enter the information into the system. This allows for enhanced tracking and visibility.
Build Pallet	
Always	Select if building of a pallet is mandatory during the receipt process.
Optional	Select if building of a pallet is optional.
If Item Tag or Serial Tracked	Select if building of pallet is required for items that are tag or serial tracked.
Build Case	

Table 2. Receiving Preferences : Return Order Window (continued)

Field	Description
Always	Select if building of case is mandatory during the receipt process.
Optional	Select if building of case is optional.
If Item Tag or Serial tracked	Select if building of case is required for items that are tag or serial tracked.
Disposition Code	
Receipt with QC	Choose the disposition code to associate with receipts for vendors or shipments that require QC.
Receipt without QC	Choose the disposition code to associate with receipts for vendors or shipment that do not require QC.
Preference for Receipt Closure by Agent	
Unconditionally	Select if receipt closure by the agent occurs every time the closure agent is run. This is typically used where receipts are closed as end-of-day process.
Received quantity at least equal to expected quantity	Select if receipt closure by the agent occurs when the received quantity is at least equal to the expected quantity.
After Putaway Completion	Select if receipt closure by the agent occurs after putaway is completed. This applies to warehouses that indicate availability only when inventory is putaway to their storage locations.
Vendor Preferences	Populated automatically from vendor preferences in Sterling Supply Collaboration. The preferences are evaluated to determine the best preference. The preference with most matches to the order details is determined as the best preference. For more information about Defining Customer Classifications, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.
Vendor	This indicates the vendor. A vendor is defined as an external company that supplies materials that you order. You receive materials from your vendors. You are, in turn, vendors to your customers.
Vendor Classification	This indicates classification of the vendor.
Item ID	This indicates item ID.
Item Classification	This indicates the custom defined item storage definition.
Force Case Content entry	This indicates whether case content entry during receipt must be forced.
Requires QC	This indicates whether QC is required or not.

The closure of a shipment triggers the upload of receipt information to external HOST systems is updated in Sterling Supply Collaboration. For example, inventory availability for the shipment is moved from an in-transit to on-hand.

Vendor-specific preferences, if any, configured as part of the Sterling Supply Collaboration displays here. For more information, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Preferences for receiving a shipment are specified as a receiving preference for the ship node and enterprise level. A supervisor, may choose to override these preferences for a specific vendor. For example, a ship node requiring case content verification for most vendors. For a particular vendor a supervisor can override this requirement while manually creating shipment.

The feature of override is only relevant when the preference has been set forcing a granular activity. For example, override is not relevant for a ship node that does not require pallet content verification at a vendor level.

Modify a Receiving Preference for Return Order

About this task

Once a Receiving Preference has been created, it can be modified.

You can modify an existing receiving preference.

Procedure
1. In the Channel Applications Manager, click the **Expand** icon adjacent to **Store-Specific Tasks** to expand the branch.
2. Click **Configure Return Order Receiving Preferences**. The Receiving Preferences : Return Order window displays.
3. In the Receiving Preferences : Return Order window, choose the receiving preference to be modified.
4. Choose the **Details** icon. The Receiving Preference Details window displays.
5. Enter information in the applicable fields. Refer to the Receiving Preferences : Return Order Window table for field value descriptions.
6. Choose the **Save** icon.

Results

Any modification to a receiving preference is applied to all future transactions.

Chapter 244. Configuring the Shipping Preferences

You can configure preferences used in the shipping process such as carrier specific preferences.

Configure the Parcel Carrier Preferences

Parcel Carrier Preferences are used to set up carrier specific preferences used in the shipping process. Parcel Carrier Preferences define the carrier name, organization code, and shipper account information, along with third party billing information.

You can perform the following tasks:

- Create a new Parcel Carrier Preference.
- Create a new Parcel Carrier Preference from an existing Parcel Carrier Preference.
- Modify a Parcel Carrier Preference.
- Delete a Parcel Carrier Preference.

Create a Parcel Carrier Preference
About this task

You can create a Parcel Carrier Preference.

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to **Shipping Preferences** to expand the branch.
2. Click **Configure Parcel Carrier Preferences** icon. The Parcel Carrier Preferences window displays.
3. In the Parcel Carrier Preferences window, choose the **Create New** icon. The Parcel Carrier Preferences Detail pop-up window displays.
4. Enter information in the applicable fields. Refer to the following table for field value descriptions.
5. Choose the **Save** icon.

Parcel Carrier Preferences Detail Pop-up Window

Table 3. Parcel Carrier Preference details

Field	Description
Carrier	Choose the carrier to set up the preferences. This is a mandatory field.
Enterprise Code	Choose the enterprise code.
Shipping Account	Enter the shipping account information.
Bill Third Party for Outbound Shipment	Check this box to bill shipping charges to a third-party organization.
Bill Third Party for Return Shipment	Check this box to bill return shipping charges to a third-party organization.
Third Party Organization Details	

Table 3. Parcel Carrier Preference details (continued)

Field	Description
Organization Code	Choose the organization code of the third party organization.
Billing Account	Choose the billing account information of the third party organization.
Online Control #	Enter the online control number for the carrier preference.
International Shipping Integration Required	Check this box if international shipping integration is required.
Domestic Shipping Integration Required	Check this box if domestic shipping integration is required.
Allow system to automatically open a manifest	Check this box if the system should be allowed to automatically open a manifest.
Put container on hold on Carrier Server while generating tracking number.	Check this box if the system should be allowed to put container on hold on carrier server while generating tracking number. Ship or release the hold while manifesting the container.
Carrier Label Delivery Mechanism	
Print	Choose this option to print the carrier label automatically.
Save as Image	Choose this option to save the carrier label in PNG format.
Integration Carrier Adapter	
Carrier Adapter Implementation	Choose the Carrier Adapter that you want to integrate with the selected carrier.

Create a new Parcel Carrier Preference from an existing Parcel Carrier Preference

About this task

You can create a new parcel carrier preference from an existing parcel carrier preference.

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to **Shipping Preferences** to expand the branch.
2. Click **Configure Parcel Carrier Preferences** icon. The Parcel Carrier Preferences window displays.
3. In the Parcel Carrier Preferences window, choose the parcel carrier preference to be copied from.
4. Choose the **Save As...** icon. The Parcel Carrier Preferences Detail pop-up window displays.
5. Enter information in the applicable fields. Refer to the Parcel Carrier Preference details table for field value descriptions.
6. Choose the **Save** icon.

Modify a Parcel Carrier Preference

About this task

You can modify an existing Parcel Carrier Preference.

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to **Shipping Preferences** to expand the branch.
2. Click **Configure Parcel Carrier Preferences** icon. The Parcel Carrier Preferences window displays.
3. In the Parcel Carrier Preferences window, choose the Parcel Carrier Preference to be modified.
4. Choose the **Details** icon. The Parcel Carrier Preference Detail pop-up window displays.
5. Enter information in the applicable fields. Refer to the Parcel Carrier Preference details table for field value descriptions.
6. Choose the **Save** icon.

Delete a Parcel Carrier Preference

About this task

You can delete an existing Parcel Carrier Preference.

Procedure

1. In the Channel Applications Manager, click the **Expand** icon adjacent to **Shipping Preferences** to expand the branch.
2. Click **Configure Parcel Carrier Preferences** icon. The Parcel Carrier Preferences window displays.
3. Choose the Parcel Carrier Preference to be deleted.
4. Choose the **Delete** icon and click **Yes** to confirm deletion.

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