

Sterling Selling and Fulfillment Suite



Applications Reference Implementation Guide

Release 9.2

Sterling Selling and Fulfillment Suite



Applications Reference Implementation Guide

Release 9.2

Note

Before using this information and the product it supports, read the information in "Notices" on page 19.

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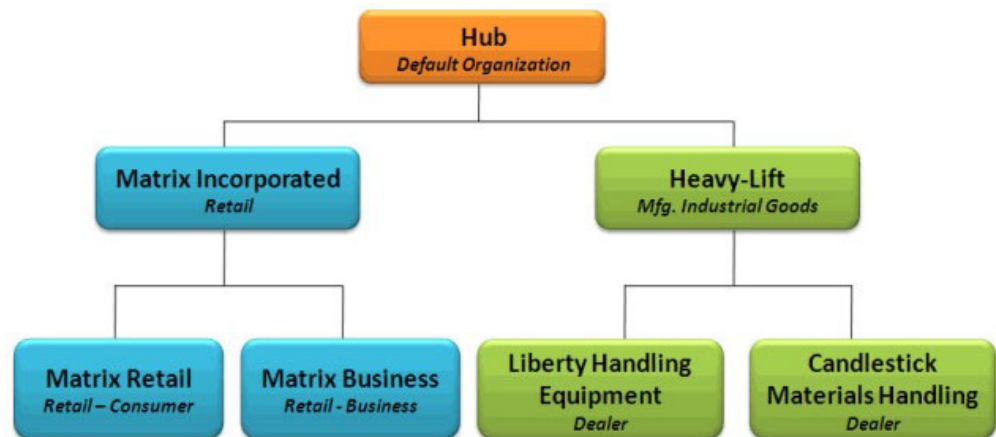
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Chapter 1. Introduction to Reference Implementation

Reference implementation is used to demonstrate the functionality of applications such as IBM® Sterling Call Center, IBM Sterling Store, and IBM Sterling Field Sales. It comprises data that can be used for presentations or for demonstrating product functionality. Reference implementation data includes sample organizations, users, teams, images, items, configuration models, item entitlements, prices, and storefront themes.

The following figure illustrates an example of the participant model provided as part of reference implementation:

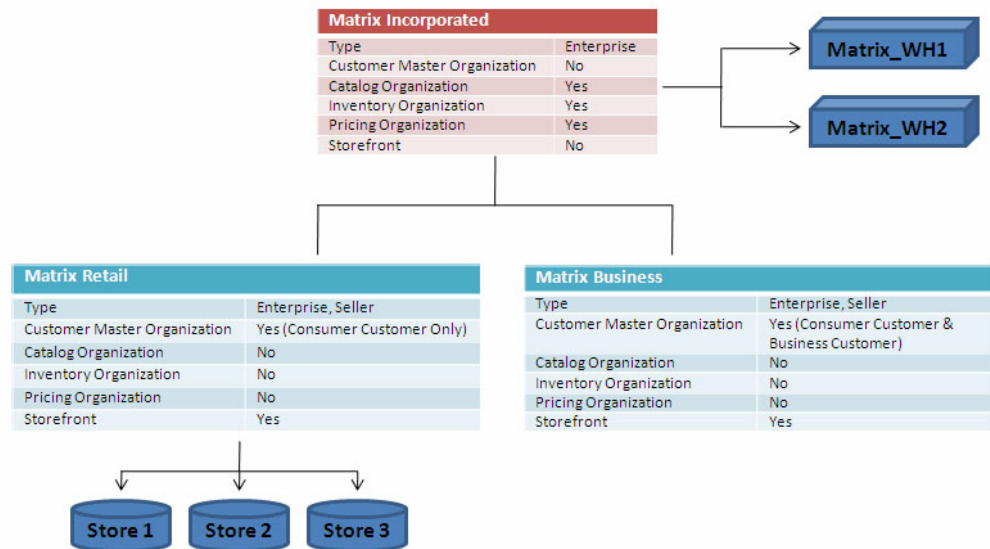


In this figure:

- Hub is the default organization provided for applications. There can only be one hub for each organization.
- Matrix Incorporated and Heavy-Lift are the enterprises provided as part of reference implementation.
- Matrix Retail (Matrix-R) and Matrix Business (Matrix-B) are enterprises of Matrix Incorporated and also have the role of a seller organization.
- Liberty Handling Equipment and Candlestick Materials Handling are enterprises of Heavy-Lift and also have the role of a dealer. Here, dealer refers to both a buyer and a seller organization.

Chapter 2. Organization Structure of Matrix Incorporated

Matrix Incorporated is one of the two enterprises provided as part of reference implementation, and Matrix Retail and Matrix Business are seller organizations of Matrix Incorporated. Matrix Incorporated is the parent organization of Matrix Retail and Matrix Business. The following figure illustrates the organization structure of Matrix Incorporated.



Matrix Incorporated has its own items, categories, price lists, and pricing rules, but does not maintain its own customer data. Matrix Incorporated has warehouses, Matrix_WH1 and Matrix_WH2, that it uses to stock inventory. Matrix Retail and Matrix Business source the products from the inventory maintained at Matrix_WH1 and Matrix_WH2.

Matrix Retail and Matrix Business are seller organizations of Matrix Incorporated. Seller organizations sell products to customers. Matrix Retail has its own stores, Store 1, Store 2, and Store 3, to present Matrix Incorporated's items to customers. Matrix Retail caters only to consumer customers.

Matrix Business does not have a store of its own. Instead, it uses Matrix Retail's stores to present its items to customers. Matrix Business caters to both consumer customers and business customers.

As part of reference implementation, you can define a set of rules that are common to both Matrix Retail and Matrix Business. You can also define rules that are specific to Matrix Retail and Matrix Business, which will enable you to configure the applications to suit your business requirements.

Rules Applicable to Matrix Retail and Matrix Business

The following table describes the list of rules that are applicable to Matrix Retail:

Rule **Rule Value**

The search fulfillment type to be used when performing a standard search for item availability in the Alternate Stores Search screen.

YCD_STORE_SEARCH

The search fulfillment type to be used when performing an extended search for item availability in the Alternate Stores Search screen.

YCD_MORE_STORE_SEARCH

Pick up items from the store

Y

Allow search for both consumer customers and business customers

N

Default customer type

02 (Consumer Customers)

Allow the addition of open box items to orders

Y

Tag identifier provided for open box items

BatchNo

Enable gift wrapping for items

Y

The following table provides the list of rules that are applicable to Matrix Business:

Rule	Rule Value
------	------------

Allow search for both consumer customers and business customers	Y
---	---

Default customer type	01 (Business Customers)
-----------------------	-------------------------

Customers of Matrix Incorporated

Matrix Incorporated is not a seller organization, and therefore, does not have any customers of its own.

Customers of Matrix Retail

Matrix Retail caters only to consumer customers. As part of the reference implementation data, the following consumer customers are provided for Matrix Retail:

- John Parks
- Abby Doyle
- Robert Smith
- Roger Wilco

As part of reference implementation, a YFS_CUSTOMER_ANALYTICS table is provided that contains the default customer grade records.

Customers of Matrix Business

Matrix Business caters to both consumer customers and business customers. Customers of Matrix Business purchase products through a different channel, thus becoming the users of that channel.

As part of the reference implementation data, the following customers and contacts are provided for Matrix Business:

- Aimico Inc.
 - Amy Adams
 - Bob Barker
- Bolton Networks
 - Adam Collins
 - Hazel Johnson
- Addams Family Values
 - Wednesday Addams
 - Pugsley Addams

As part of reference implementation, a YFS_CUSTOMER_ANALYTICS table is provided that contains the default customer grade records.

IBM Sterling Call Center Sample Users for Matrix Incorporated

The IBM Sterling Call Center reference implementation data includes the following users for Matrix Incorporated.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

mjones	Call Center Representative Lead
---------------	---------------------------------

mstevens	Call Center Representative
-----------------	----------------------------

IBM Sterling Field Sales Sample Users for Matrix Incorporated

The IBM Sterling Field Sales reference implementation data includes the following users for Matrix Incorporated.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

mvernon	Sales Vice President
----------------	----------------------

mmorrison	Sales Manager
------------------	---------------

mrussell	Sales Representative
-----------------	----------------------

IBM Sterling Business Center Sample Users for Matrix Incorporated

The IBM Sterling Business Center reference implementation data includes the following user for Matrix Incorporated.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

madams	Item and Pricing Administrator
---------------	--------------------------------

Note: The reference implementation data for Matrix Incorporated does not include users for IBM Sterling Store.

IBM Sterling Call Center Sample Users for Matrix Retail

The IBM Sterling Call Center reference implementation data includes the following users for Matrix Retail.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

rjones	Call Center Representative Lead
---------------	---------------------------------

rstevens	Call Center Representative
-----------------	----------------------------

IBM Sterling Store Sample Users for Matrix Retail

The IBM Sterling Store reference implementation data includes the following users for Matrix Retail.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

abrooks	Store Manager for Store 1
----------------	---------------------------

bbrooks	Store Manager for Store 2
----------------	---------------------------

cbrooks	Store Manager for Store 3
----------------	---------------------------

asmith	Store Associate for Store 1
---------------	-----------------------------

bsmith	Store Associate for Store 2
---------------	-----------------------------

csmith	Store Associate for Store 3
---------------	-----------------------------

IBM Sterling Field Sales Sample Users for Matrix Retail

The IBM Sterling Field Sales reference implementation data includes the following users for Matrix Retail.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

rvernon	Sales Vice President
----------------	----------------------

rmorrison	Sales Manager
------------------	---------------

rrussell	Sales Representative
-----------------	----------------------

IBM Sterling Business Center Users Sample Users for Matrix Retail

The IBM Sterling Business Center reference implementation data includes the following user for Matrix Retail.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

radams	Item and Pricing Administrator
---------------	--------------------------------

IBM Sterling Call Center Sample Users for Matrix Business

The IBM Sterling Call Center reference implementation data includes the following users for Matrix Business.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

bjones	Call Center Representative Lead
---------------	---------------------------------

bstevens	Call Center Representative
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IBM Sterling Field Sales Sample Users for Matrix Business

The IBM Sterling Field Sales reference implementation data includes the following users for Matrix Business.

Note: Users can use their user names as password to log in to the application.

User	Description
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bvernon	Sales Vice President
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bmorrison	Sales Manager
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brussell
Sales Representative

IBM Sterling Business Center Sample Users for Matrix Business

The IBM Sterling Business Center reference implementation data includes the following user for Matrix Business.

Note: Users can use their user names as password to log in to the application.

User Description

badams
Item and Pricing Administrator

Note: The reference implementation data for Matrix Business does not include users for IBM Sterling Store.

Catalog Management for Matrix Incorporated

Catalogs are hierarchies of items that are organized into groups or categories for different purposes. Matrix Incorporated is a catalog organization, which means the master catalog and the items defined within are maintained by Matrix Incorporated. Matrix Retail and Matrix Business do not have a master catalog of their own, and therefore, they inherit the items defined for Matrix Incorporated.

This topic describes various items such as, Regular Items, Bundle Items, Configurable Items, and Items with Variations that are provided as part of reference implementation for the Matrix Incorporated enterprise.

Regular items are the basic products of a catalog, and can be used for various product associations. The following table lists some of the regular items that are provided as part of the reference implementation data.

Item ID	Description	UOM
100001	Tierra 42" Plasma Television/HDTV	EACH
100002	Omega Progressive-Scan DVD Player with 1080p Upconversion	EACH
100006	Alpha TIERRA/ 42" Class / 1080p / 60Hz / LCD HDTV	EACH
100701	Alpha Refrigerator - Stainless Steel / Side by Side / Left	EACH
100702	Alpha Refrigerator - Stainless Steel / Side by Side / Right	EACH

Bundle item is a package that consists of products, services, and/or other bundles. A bundle item comprises a bundle parent item and bundle components. The following table lists some of the bundle items that are provided as part of the reference implementation data.

Item ID	Description	UOM
100005	Alpha-Omega Entertainment System	EACH

Item ID	Description	UOM
100008	Matrix MXLP-210 Laptop Computer	EACH

The following table lists the component items bundled with the Alpha-Omega Entertainment System:

Item ID	Description	UOM	Quantity
100001	Tierra 42" Plasma Television/HDTV	EACH	1
100002	Omega Progressive-Scan DVD Player with 1080p Upconversion	EACH	1
100003	Alpha 890 Advanced Universal Remote	EACH	1
100004	X-540 Multimedia Surround Sound Speaker System (6-Piece)	EACH	1

An item with variations is a grouping of items that have similar characteristics, and are displayed as a single item. The following table lists an item with variations that is provided as part of the reference implementation data.

Item ID	Description	UOM
100700	Alpha Refrigerator Available with Variations	EACH

The following table lists the variations provided for the Alpha Refrigerator:

Item ID	Description	UOM
100701	Alpha Refrigerator- Stainless Steel/Side by Side/Left	EACH
100702	Alpha Refrigerator- Stainless Steel/Side by Side/Right	EACH

In the above example, the attributes that define the variations for the Alpha Refrigerator are door handle, orientation, and color.

Delivery Service items are items that are heavy or fragile, and cannot be transported by regular carriers. These items may also require special handling. The following table lists the delivery service items that are provided as part of the reference implementation data.

Item ID	Description	UOM
Delivery	Delivery	UNIT
Return	Home Return	UNIT

Pricing Management for Matrix Incorporated

Pricing management provides the capability to create and maintain price lists, pricing rules, and coupons that pertain to a pricing organization. Matrix Incorporated is a Pricing Organization, which means the master price list and the pricing rules that are defined are maintained by Matrix Incorporated. Matrix Retail and Matrix Business are not pricing organizations, and therefore, they inherit the price lists defined for Matrix Incorporated. This topic describes the various pricing rules and coupons, that are provided as part of reference implementation for Matrix Incorporated.

Pricing rules are used to perform pricing adjustments to an order. The rules define a set of conditions and actions. The following table lists the pricing rules that are provided as part of the reference implementation data.

Pricing Rule

Description

Buy 3 get 4th free

This Item Quantity rule provides the fourth item free of charge on purchase of three items. This rule is applicable only if you purchase any of the TV accessories or audio or video products.

Buy a TV, get a free Universal Remote

This Combination rule provides an Alpha 890 Advanced Universal Remote on purchase of any of the following TVs:

- Tierra 42" Plasma Television/HDTV
- Alpha Tierra / 42" Class / 1080p / 60Hz / LCD HDTV
- Omega 42" Plasma Television

Order Level Discount

This Order Total rule applies the following discounts on the order total:

- 10% discount on the order total if the order total is more than \$100.
- 15% discount on the order total if the order total is more than \$200.
- 25% discount on the order total if the order total is more than \$300.

Shipping Discount

This Ship Order Total rule applies a 50% discount on shipping charges when the order total is more than \$100. When the order total is more than \$150, shipping is provided free of cost.

TV Discount

This Item Quantity rule applies a 5% discount on purchase of a 42" TV.

TV and Refrigerator

This Combination rule applies a 50% discount on the Alpha Refrigerator if you buy a Tierra 42" Plasma Television/HDTV, and an Alpha Refrigerator.

Coupons are a type of pricing rule, usually in the form of tickets or documents, which can be exchanged for a financial discount on a product or an order. The following table lists the coupons that are provided as part of the reference implementation data.

Coupon ID

Description

Combination Coupon

This Combination Coupon applies a 50% discount on the Omega Progressive Scan DVD Player if you buy an Omega 42" Plasma TV and an Omega Progressive Scan DVD Player.

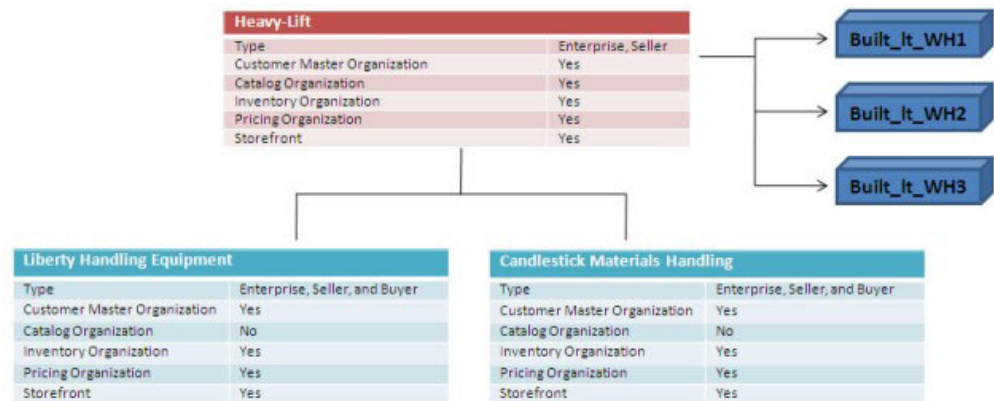
Order Level Coupon

This Order Level coupon applies the following discounts on the order total:

- 10% discount on the order total if the order total is more than \$100.
- 15% discount on the order total if the order total is more than \$200.
- A discount of \$25 on the order total if the order total is more than \$300.

Chapter 3. Organization Structure of Heavy-Lift

Heavy-Lift is one of the two enterprises that is provided as part of reference implementation. Liberty Handling Equipment and Candlestick Materials Handling are dealers of Heavy-Lift. Heavy-Lift is an enterprise that manufactures industrial goods. It sells its products through its dealers. The following figure illustrates the organization structure of Heavy-Lift.



Heavy-Lift has its own items, categories, price lists, pricing rules, and customers. Heavy-Lift contains Built_It_WH1, Built_It_WH2, and Built_It_WH3 warehouses that are used to stock inventory.

Heavy-Lift sells its products through dealers, which are organizations that purchase items from an enterprise and sell these items through their own storefronts. Heavy-Lift has a storefront with dealer specific item entitlements and prices.

Liberty Handling Equipment and Candlestick Materials Handling are dealers of Heavy-Lift. They have their own storefronts through which they sell Heavy-Lift's configurable forklifts and value-added products such as forklift accessories, industrial shelving systems, and so on. These value-added products are managed and sourced by the dealers. Liberty Handling Equipment and Candlestick Materials Handling are also known as the subcatalog organizations of Heavy-Lift, and therefore, can add additional items to the list of items provided by Heavy-Lift. They can also configure their own price lists and maintain their own customers.

As part of reference implementation, you can define a set of rules that are common to both Liberty Handling Equipment and Candlestick Materials Handling. However, there are no specific rules provided for Liberty Handling Equipment and Candlestick Materials Handling.

Rules Applicable to Liberty Handling Equipment and Candlestick Materials Handling

No specific rules are provided as part of reference implementation for Liberty Handling Equipment and Candlestick Materials Handling.

Customers of Heavy-Lift

Heavy-Lift is a Seller organization that consists of two dealers. Liberty Handling Equipment and Candlestick Materials Handling are dealer organizations of Heavy-Lift that purchase products from the Heavy-Lift storefront and sell these products through their own storefronts. Therefore, Liberty Handling Equipment and Candlestick Materials Handling are the users as well as customers of Heavy-Lift.

As part of the reference implementation data, the following customers and contacts are provided for Heavy-Lift:

- LibertyHE
 - Art Blakey
 - Bill Frizzel
- Candlestick
 - Michael Bolton
 - Abigail Ashby

As part of reference implementation, a YFS_CUSTOMER_ANALYTICS table is provided that contains the default customer grade records.

Customers of Liberty Handling Equipment

As part of the reference implementation data, the following customers and contacts are provided for Liberty Handling Equipment:

- Wings Incorporated
 - Alex Calder
 - Robert Smithson
- Freedom Industrial Manufacturing
 - Hugh Downs
 - Dan Marino

As part of reference implementation, a YFS_CUSTOMER_ANALYTICS table is provided that contains the default customer grade records.

Customers of Candlestick Materials Handling

As part of the reference implementation data, the following customers and contacts are provided for Candlestick Materials Handling:

- Shipyards Management Inc.
 - Bob Barker
 - Aaron Ryle
- Best Bay
 - Michael Jackson
 - Adam Collins

As part of reference implementation, a YFS_CUSTOMER_ANALYTICS table is provided that contains the default customer grade records.

IBM Sterling Call Center Sample Users for Heavy Lift

The IBM Sterling Call Center reference implementation data includes the following users for Heavy-Lift.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

hlong	Call Center Representative Lead
--------------	---------------------------------

hbrown	Call Center Representative
---------------	----------------------------

IBM Sterling Field Sales Sample Users for Heavy Lift

The IBM Sterling Field Sales reference implementation data includes the following users for Heavy-Lift.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

hvernon	Sales Vice President
----------------	----------------------

hmorrison	Sales Manager
------------------	---------------

hrussell	Sales Representative
-----------------	----------------------

IBM Sterling Business Center Sample Users for Heavy Lift

The IBM Sterling Business Center reference implementation data includes the following user for Heavy-Lift.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

heavylift	Item and Pricing Administrator
------------------	--------------------------------

Note: The reference implementation data for Heavy-Lift does not include users for IBM Sterling Store.

IBM Sterling Call Center Sample Users for Liberty Handling Equipment

The IBM Sterling Call Center reference implementation data includes the following users for Liberty Handling Equipment.

Note: Users can use their user names as password to log in to the application.

User	Description
------	-------------

llong	Call Center Representative Lead
--------------	---------------------------------

emonroe	Call Center Representative
----------------	----------------------------

IBM Sterling Field Sales Sample Users for Liberty Handling Equipment

The IBM Sterling Field Sales reference implementation data includes the following users for Liberty Handling Equipment.

Note: Users can use their user names as password to log in to the application.

User Description

lvernnon
Sales Vice President

lmorrison
Sales Manager

lrussell
Sales Representative

IBM Sterling Business Center Sample Users for Liberty Handling Equipment

The IBM Sterling Business Center reference implementation data includes the following user for Liberty Handling Equipment.

Note: Users can use their user names as password to log in to the application.

User Description

cchase Item and Pricing Administrator

Note: The reference implementation data for Liberty Handling Equipment does not include users for IBM Sterling Store.

IBM Sterling Call Center Sample Users for Candlestick Materials Handling

The IBM Sterling Call Center reference implementation data includes the following users for Candlestick Materials Handling.

Note: Users can use their user names as password to log in to the application.

User Description

creddy
Call Center Representative Lead

dstabler
Call Center Representative

IBM Sterling Field Sales Sample Users for Candlestick Materials Handling

The IBM Sterling Field Sales reference implementation data includes the following users for Candlestick Materials Handling.

Note: Users can use their user names as password to log in to the application.

User Description

cvernon
Sales Vice President

cmorrison
Sales Manager

crussell
Sales Representative

IBM Sterling Business Center Sample Users for Candlestick Materials Handling

The IBM Sterling Business Center reference implementation data includes the following user for Candlestick Materials Handling.

Note: Users can use their user names as password to log in to the application.

User Description

mdavis
Item and Pricing Administrator

Note: The reference implementation data for Candlestick Materials Handling does not include users for IBM Sterling Store.

Catalog Management for Heavy-Lift

Catalogs are hierarchies of items that are organized into groups or categories for different purposes. Heavy-Lift is a catalog organization, which means the master catalog and the items defined within are maintained by Heavy-Lift. Liberty Handling Equipment and Candlestick Materials Handling are subcatalog organizations of Heavy-Lift, and therefore, can add additional items to the list of items already maintained by Heavy-Lift.

This topic describes various items such as, Regular Items, Bundle Items, and Configurable Items that are provided as part of reference implementation for the Heavy-Lift enterprise.

Regular items are the basic product of a catalog and can be used for various product associations. The following table lists some of the regular items that are provided as part of the reference implementation data.

Item ID	Description	UOM
200475	Automatic Eagle Beak Drum Positioner	EACH
200477	Gorilla Super Duty Shelve 48"x38"x25"	EACH
200478	Extreme modular shelve 40"x26"x26" unit	EACH

Bundle item is a package that consists of products, services, and/or other bundles. A bundle item comprises of a bundle parent item and bundle components. The following table lists some of the bundle items that are provided as part of the reference implementation data.

Item ID	Description	UOM
200001	HeavyLift HL2040R	EACH

Item ID	Description	UOM
200002	HeavyLift HL2070R	EACH
200474	HeavyLift HL2040R (Basic Warehouse)	EACH
200479	Electric Counterbalance VF1	EACH

The following table lists the component items bundled with HeavyLift HL2040R (Basic Warehouse)

Item ID	Description	UOM	Quantity
200322	HL 7 x 12-10PR Solid Drive Tire	EACH	1
200201	MZDA 2.0L Engine	EACH	1
200350	HL Simplex Mast MFH: 103.5, L: 80.0, FL: 5.5	EACH	1
200390	36" Pallet Fork	EACH	1
200331	HL 6.00 x 9-10PR Solid Steer Tire	EACH	1
200461	2-Hose Internal (1AUX)	EACH	1

A physical kit is considered as a single item and is not divided into components. Inventory is maintained only for the parent item, and therefore, item availability does not check for the availability of child items.

A buyer has to buy all the child items as one item. The following table lists a physical kit item that is provided as part of the reference implementation data.

Item ID	Description	UOM
200476	Heavylift HL2040R HeavyDuty (as configured)	EACH

The following table lists the child items configured for Heavylift HL2040R HeavyDuty (as configured):

Item ID	Description	UOM
200465	Specter 2-Way Catalysator Gas/LPG Exhaust System	EACH
200346	HL 6.00 x 9-12PR Solid Steer Tire	EACH
200206	GEM 3.2L V6 Dual Fuel Engine	EACH
200342	HL 7.00 x 12-12PR Solid Soft Drive Tire	EACH
200362	HL Triplex Mast MFH: 210.5, L:84.0, FL:48.5	EACH
200372	42" Wide Class II Carriage (Triplex)	EACH

Delivery Service items are items that are usually heavy or fragile and cannot be transported by regular carriers. These items may also require special handling. The following table lists the delivery service items that are provided as part of the reference implementation data.

Item ID	Description	UOM
Delivery	Delivery	UNIT

Pricing Management for Heavy-Lift

Pricing management provides the ability to create and maintain price lists, pricing rules, and coupons that pertain to a pricing organization. Heavy-Lift is a Pricing Organization, which means the master price list and the pricing rules defined are maintained by Heavy-Lift. However, Liberty Handling Equipment and Candlestick Materials Handling are also pricing organizations, and therefore, can define their own price lists, pricing rules, and coupons. This topic describes the various pricing rules that are provided as part of reference implementation for the Heavy-Lift enterprise.

Note: As part of the reference implementation data, a master price list is provided only for Heavy-Lift and Liberty Handling Equipment. Also, the pricing rules are provided only for Heavy-Lift and not for Liberty Handling Equipment and Candlestick Materials.

Pricing rules are used to perform pricing adjustments to an order. The rules define a set of conditions and actions. The following table lists the pricing rules that are provided as part of the reference implementation data.

Pricing Rule

Description

15% of \$200,000

This Order Total rule applies a 15% discount on the order total if the order total is more than \$200,000 and a 18% discount on the order total if the order total is more than \$500,000.

200001 Bonus

This Combination rule provides a 60" Pallet Fork on purchase of three HeavyLift HL2040R.

September Special

This Item Quantity rule applies a discount of \$550.59 on the order total if your order contains two HeavyLift HL2030R.

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