Sterling Store Associate Mobile

Application Guide

3.1.00

Sterling Commerce
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Contents

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What is Sterling Store Associate Mobile Application?

The Sterling Store Associate Mobile application enables a store associate to:

• View inventory availability in a store and other stores located within a specified radius of this store
• View item details, item specifications, and related items of an item
• View item-level promotions
• Override the price of an item
• Add coupons to an order
• Place an order for a consumer
• Place an order for a guest user
• Perform backroom pick for customer orders
• Print the order summary
• Select multiple payment methods
• Scan the barcode to get the details for an item
• Use a credit card reader to bill the customer for a purchase

Note: Sterling Store Associate Mobile supports only US English.

Where Can I get Sterling Store Associate Mobile Application From?

Download the Sterling Store Associate Mobile application from the iTunes® App Store.

You can also, copy the client-side pack from Support Center.

What Do I Require Before Using Sterling Store Associate Mobile Application?

To use the Sterling Store Associate Mobile application, the server-side pack and the client-side application must be installed:

Server-Side Pack:

• Selling and Fulfillment Foundation, Release 8.5, HF23 or above.
• Sterling Call Center, Release 8.5, and Sterling Store, Release 8.5.
• All the Catalog items must be indexed using Lucene, which is available with Selling and Fulfillment Foundation, Release 8.5. For more information about indexing catalog items, refer to the *Catalog Management Concepts Guide*.
• The store should support the backroom pick process. Ensure that your enterprise uses the pipeline provided by the Sterling Store application.

Client-Side:

• iPhone OS 3.1 or later. (for both iPhone and iPod touch).

How Do I Install Sterling Store Associate Mobile Application?

To install the Sterling Store Associate Mobile application:

1. Install the server side component as follows:

    a) Install the `smcommon_1.1.jar` option pack on the server side from the `<INSTALL_DIR>\bin` directory using the following command:

    • For Windows:

    ```
    InstallService.cmd smcommon_1.1.jar
    ```

    • For UNIX or Linux:

    ```
    InstallService.sh smcommon_1.1.jar
    ```

    b) Install the `ssa_3.1.jar` option pack on the server side from the `<INSTALL_DIR>\bin` directory using the following command:

    • For Windows:

    ```
    InstallService.cmd ssa_3.1.jar
    ```

    • For UNIX or Linux:

    ```
    InstallService.sh ssa_3.1.jar
    ```

    Here `<INSTALL_DIR>` refers to the location at which Selling and Fulfillment Foundation, Release 8.5 is installed.

    c) Build the ssa Web application and deploy it on the server side from the `<INSTALL_DIR>\bin` directory by using the following command:

    • For Windows:

    ```
    buildwar.cmd -Dappserver=<your application server> -Dwarfiles=ssa
    ```

    • For UNIX or Linux:

    ```
    buildwar.sh -Dappserver=<your application server> -Dwarfiles=ssa
    ```

Here `<INSTALL_DIR>` refers to the location at which Selling and Fulfillment Foundation, Release 8.5 is installed. The valid values for <your application server> parameter are weblogic, websphere, or jboss.

Note: When deploying applications ensure that the ssa.war is not a part of the smcfs.ear. Deploy `ssa.war` separately.

2. Install the client side component, download the Sterling Store Associate Mobile application from the iTunes® App Store and install the application to your iPhone or iPod touch.

What Do I Have to Configure Before Using Sterling Store Associate Mobile Application?

Before using the Sterling Store Associate Mobile application, you must perform the following client-side and server-side configurations:

1. On the client-side, configure the following profiles in the application settings:

   • Development
   • Test
   • Production

   The following table describes the parameters that must be set for each of these listed profiles:

Parameters	Description
User ID	Optional. The value entered will be the default user identifier.
Server URL	URL of the Selling and Fulfillment Foundation server, for example, http://<IP Address>.
Server Port	Port number of the Selling and Fulfillment Foundation server, for example, 7001.
Context Root	The value of this parameter must be set to ssa.
Image Server	Location on the image server where the images are stored, for example, http://<IP Address>.
Image Type	The type of images that are stored in the image server, for example, `.png`, `.jpeg`, and so on.
Distance to Consider	Distance to be considered while searching for nearby stores.
Distance UOM	The unit of measure for the Distance to Consider parameter, for example, Mile.

Notes:

• If you do not want to use the development profile, or test profile, or both, do not configure them.

- Prefix http:// or https:// to the Server URL based on the protocol.
- Ensure that the Server URL is accessible from your network. You may have to configure the VPN on your mobile device in order to do so.

2. On the server side, perform the configurations specified below.

- To configure the print service for orders:

  - Override the `printOrderSummary` action to print the order summary. Additionally, set the value of the `inputNs` parameter to printOrderSummary_Input.

    The application provides the input to the `printOrderSummary` action in the following format:

    ```
    <Order OrderHeaderKey="" OrderNo="" ShipNode="">

    <Print PrinterId=""/>

    </Order>
    ```

Elements	Description
OrderHeaderKey	The unique identifier of the order.
OrderNo	The order identifier.
ShipNode	The store to which you are logged in.
PrinterID	The unique identifier of the printer to use for printing the order.

The application expects the output in the following format:

```
<Order OrderHeaderKey="" >

<Print ResultCode="" ResultDescription=""/>

</Order>
```

Elements	Description
OrderHeaderKey	The unique identifier of the order.
ResultCode	The value of this element is SUCCESS only if printing is successful.
ResultDescription	If the printing is unsuccessful, a print failure message is displayed with the value of this element as the message body.

When an order is successfully confirmed, the **Send to Printer** text box is displayed and the **Print** button is enabled. You can invoke the print service by clicking the **Print** button. To change the printer ID, you can either enter the printer ID in the text box or scan the printer ID.

Note: To disable the `yfs.sam.printer.disable` property, set the value to Y.

- To configure ship nodes with an appropriate address, phone number, e-mail ID, latitude, and longitude, in the `<INSTALL_DIR>\properties\yfs.properties_ssa_ext` file, modify the values of the properties, as described here:

  - If you want your store to accept calls from the store associates of other stores, set the value of `yfs.sam.inventoryView.phone.disable` property to N. Otherwise, set the value to Y.
  - If you want your store to accept e-mails from the store associates of other stores, set the value of `yfs.sam.inventoryView.email.disable` property to N. Otherwise, set the value to Y.
  - If you want to display your store on a map view, set the value of `yfs.sam.inventoryView.mapView.disable` property to N. Otherwise, set the value to Y.
  - If you want your store to pick orders, set the value of `yfs.sam.inventoryView.pick.disable` property to N. Otherwise, set the value to Y.
  - If you want your store to ship orders, set the value of `yfs.sam.inventoryView.ship.disable` property to N. Otherwise, set the value to Y.

  Here, `<INSTALL_DIR>` refers to the location at which Selling and Fulfillment Foundation, Release 8.5 is installed.

  It is recommended that you set the value to N for any two of the following properties. If you set the value to N for all the following properties, the `yfs.sam.inventoryView.phone.disable` property will be given the least priority.

  - `yfs.sam.inventoryView.pick.disable`
  - `yfs.sam.inventoryView.phone.disable`
  - `yfs.sam.inventoryView.email.disable`

- To add a promotion on the home page, provide the list of comma-separated image filenames for the `yfs.sam.homeView.ItemsUnderPromotion` property. For example:
  `yfs.sam.homeView.ItemsUnderPromotion=Item01.png,Item02.png,Item03.png`

Note: Notes entered for the addition of coupon task is saved in the order using the SSA_ADD_PROMOTION note type. Similarly, the notes entered for the deletion of a coupon task is saved in the order using the SSA_REMOVE_PROMOTION note type.

- To customize labels and error messages, modify the `<INSTALL_DIR>\resources\ssabundle.properties` file.

  Here, `<INSTALL_DIR>` refers to the location at which Selling and Fulfillment Foundation, Release 8.5 is installed.

- To customize the e-mail template, override `<INSTALL_DIR>\repository\xapi\template\source\ssa\email\storeassist\template_mail.xsl`, which is the out-of-the-box template.

  Here, `<INSTALL_DIR>` refers to the location at which Selling and Fulfillment Foundation, Release 8.5 is installed.

What Do I Have to Configure to Connect to My PA-DSS Server?

To enable the Payment Application Data Security Standard (PA-DSS) tokenization of credit card and store value card numbers:

1. Set the value of `yfs.sam.PADSS.disable` to N, if it is not already set to N.
2. Set up your PA-DSS server.
3. Set the value of `yfs.sam.PADSSServerURL` to the URL of your PA-DSS server (format: `https://<host>:<port>/url`).

   The application calls the URL you provided with the following parameters:

Parameters	Description
ssdcsAuthenticationToken	Currently blank. Reserved for future releases.
ssdcsRedirectUrl	The output Java Server Page (JSP) to be used. Reserved for future releases.
ssdcsDataToTokenize	The Payment Application Number (PAN).
ssdcsDataType	Set to `ssdcsCreditCardNumber` for credit card or `ssdcsStoredValueCardNumber` for stored value card.
ssdcsDataTypeDetail	Provides the Payment Type being used.
ssdcsResultCode	Passed as `INITIAL` to tokenize Immediately.

4. The application expects the output in the following format:

   ```
   <Tokenize>

   <TokenInformation DataType="" Token="" DisplayValue="" AdditionalResultData=""/>

   <ResultInformation ResultCode="" FailReason="" ResultDescription=""/>

   </Tokenize>
   ```

Elements	Description
DataType	This should be set to `CREDIT_CARD` or `STORED_VALUE_CARD`.
Token	This should be set to the PAN.
DisplayValue	This should be set to the PAN to be displayed on the user interface.
AdditionalResultData	This should be set to the `CREDIT CARD Type` for credit card or `PaymentReference3` for stored value card.
ResultCode	This should be set to `SUCCESS` if tokenization is successful.
FailReason	This should be set to the reason why tokenization failed. This value is displayed as the error message if tokenization fails.
ResultDescription	This should be set to the description of the result. Reserved for future releases.

Note: Credit card and gift card swipe is limited to the **Order Summary**, **Add New Payment Methods**, and **Card Details** screens.

How Do I Format the Phone Numbers Entered in the Customer Search Screen?

In the Sterling Store Associate Mobile Application, when a user searches for customers using the phone number, only numeric characters will be accepted. However, some organizations may store the phone numbers in a particular format, for example, (555)555 5555, 555-555-5555, and so on. In such situations,the phone number must be formatted before the getCustomerContactList API is called. To ensure that the phone number is formatted, perform the following tasks:

1. Override the smcommon-getCustomerContactList mashup in the `smcommon_mashups.xml` file. For more information about extending mashups, refer to the topic "Extending Mashups Using Override Extensibility (Web UI Framework)" in the Selling and Fulfillment Foundation: Customizing the Web UI Framework Guide and follow the instructions provided in the topic to automatically override a mashup.

2. Ensure that the class that overrides the mashup action extends the com.sterlingcommerce.smcommon.mashups.SMCCustomerContactMashup class.

How Do I Search for Customer Based on the Credit Card Token?

In the Sterling Store Associate Mobile Application, a user can search for customers based on the Primary Account Number token used for credit cards. This is enabled by passing a Tokens element in the input XML of the getCustomerContactList API.

```
<CustomerContact>
<Tokens>
<Token Value="token info"/>
</Tokens>
</CustomerContact>
```

The Tokens element contains a list of tokens for each of the credit card payment methods stamped on the order. You can customize the customer search functionality to retrieve additional information in the search results by customizing the smcommon-getCustomerContactList mashup to use a custom class that extends the com.ibm.smc.actions.SMCGetCustomerContactListAction class. This enables the Tokens element to be used to call a third party service to get additional information for the search results.

To customize the customer search functionality to retrieve additional information in the search results, perform the following tasks:

1. Override the smcommon-getCustomerContactList mashup in the `smcommon_mashups.xml` file. For more information about extending mashups, refer to the topic "Extending Mashups Using Override Extensibility (Web UI Framework)" in the Selling and Fulfillment Foundation: Customizing the Web UI Framework Guide and follow the instructions provided in the topic to automatically override a mashup.

2. Ensure that the class that overrides the mashup action extends the com.ibm.smc.actions.SMCGetCustomerContactListAction class.

Does Sterling Store Associate Mobile Support Internationalization?

The Sterling Store Associate Mobile Application supports internationalization that is specific to the U.K. only in the context of the following data:

• Date format of the U.K. locale (dd/mm/yyyy)
• Currency (£)

What Are the Issues That I May Encounter?

The following table describes the errors that you may encounter when using this application, and the causes and resolution for the same.

Error	Cause	Solution
Unable to connect because you do not have the Manage Mobile Device permission to log in to the Sterling Store Associate Mobile application.	You have not configured the mobile device permissions correctly in the Sterling Store Associate Mobile application, in the context of the User ID with which you are attempting to log in.	Configure the mobile device permissions correctly in the Sterling Store Associate Mobile application, in the context of the User ID with which you are attempting to log in.
Unable to log in to the Sterling Store Associate Mobile application.	The user name or password that you have entered are invalid.	Enter a valid user name and password.
Unable to connect because the secure connection has failed.	Your HTTPS setting is set to On, but you are trying to connect to a nonsecure port.	Connect to a secure port.
Unable to connect because of untrusted server certificate.	The Sterling Store Associate Mobile application has the HTTP Authentication turned On and is using a CA (Certificate Authority) certificate, but you do not have a valid CA public certificate installed on your iPhone or iPod touch.	Ensure that a valid CA public certificate is installed on your iPhone or iPod touch.
The connection times out when you log in to the Sterling Store Associate Mobile application.	This could be due to the following reasons: • Failure on the side of your iPhone or iPod touch service provider • Your IP address and port are not configured correctly.	• Contact your iPhone or iPod touch service provider • Configure your IP address and port correctly.
After upgrading to Sterling Store Associate Mobile application, Release 3.1.00, the application's	Apple Inc. does not provide the capability to modify the version and build number in the iPhone or iPod touch application settings.	After upgrading to Sterling Store Associate Mobile application, Release 3.1.00, launch the application, the version number and build number will be automatically updated.

Error	Cause	Solution
version number and build number is not updated.		

Known Issues in Sterling Store Associate Mobile Application

Users may encounter the following known issues when using the Sterling Store Associate Mobile application, Release 3.1.00:

• 231405 – If a gift card or credit card is partially authorized or charged when placing an order, the store associate is unable to confirm the order using Sterling Store Associate Mobile Application.

Solution/Workaround – The store associate can confirm the order by opening the order using Sterling Call Center/Sterling Store.

• 237239/237344 – If you override the price of an item and try to delete the line, the following error message is displayed "All awards must be associated to a promotion on the order."

Solution/Workaround– In the "Price Override" screen, use the "Reprice" button to reset the price of that item before deleting the line.

How Do I Get Customer Support for Sterling Store Associate Mobile Application?

Sterling Commerce fosters long-term business partnerships with its customers. Committed to customer satisfaction and quality support, Sterling Commerce Customer Support has a world-wide staff, providing support 24 hours a day, 365 days a year. For assistance with usage, configuration, or enhancement information, refer to the Customer Support Reference Guide. Our Support Reference outlines our support hours, contact information, and key information that will streamline your support experience with us. Reference this site at:

http://www.sterlingcommerce.com/apps/collaterallibrary/external/DownloadFile.asp?fil=101797

Additionally, you have access to Customer Center, which provides a wealth of online resources to enrich your business experience with us. By using Customer Center, you can access many Self-Support Tools, including a Knowledge-Base, Documentation, and Education. Reference this site at:

http://customer.sterlingcommerce.com

How Do I Access Documentation for Sterling Mobility Applications?

The online documentation for Sterling Mobility Applications is available at
http://www.sterlingcommerce.com/documentation/home/mobile/MobileAppsHome.html

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