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| Functional Design Document |
| CHG212925 |
| CHG OM: Introduce global order categorization |
| Markets: All |
| Release: RLS000700 (Feb’22) |



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# Document approval

|  |  |  |
| --- | --- | --- |
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This is to confirm that we have reviewed the functional specifications for the proposed solution. We agree with its contents and understand that the technical specifications will be designed based on this approved document.

# Revision history

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Revision | Section(s) | Description | Editor | Date |
| 1.0 | - | Draft | J.Andreyeva | 10.07.2021 |
| 1.1 | 1.1 | Business Process updated | J.Andreyeva | 19.07.2021 |
| 1.2 |  |  | E.Voronina | 30.09.2021 |
| 2.0 |  |  |  |  |
| 2.1 |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Business Process Overview

## Process Overview

With the implementation of TME Connect we’d like to achieve standardization of the processes related to order management and get the integration with a new mobile application.

In scope of this change request, we’d like to establish additional level of orders categorization which allows to standardize the meaning of different order types currently used by the markets.

This CHG is not breaking existing functionality of order types and can be implemented for TME Connect solutions

## Impact Matrix

|  |  |
| --- | --- |
| GRM Functionality | Order |
| Impact Current Functionality? | Yes |
| Markets Affected | All |
| Applications Affected | Sales / Data |
| Risk of Implementing the change | Medium |

# Description of the functional change

## Changes in Siebel Sales

As part of this change request, additional level of order categorization should be introduced by adding ‘Order Category’ LOV field to the orders object.

Further standardization of the orders processes is planned to be implemented further in V2 based on the order category instead of the localized market values of order type (e.g. activation of the inventory management, order validations – part of the scope of the personalization framework)

The values of the field can be the following: Transfer Order, Excar Order, Telesales Order, Web Order, Service Order, Return Order, Exchange Order, Material Order. It should be possible to configure additional Order Categories if needed (only by system admin users, like BTS, ODC)

The field should be added to the following BC: Order Entry – Orders and displayed to the following applets: GAL Order Entry - Order List Applet; JTI Order Entry - Order List Applet (Service); JTI Order Entry - Order List Applet (Service) – My; Order Entry - Order List Applet; PUB Service Provider Portal Order List Applet; Service Order List Applet; JTI Order Entry - Order List Applet (Materials); JTI Order Entry - Order Promotion List Applet; JTI Order Entry Order List Owner Applet (Materials); Order Entry - Account Summary Order List Applet; JTI JTI Order Entry - Order List Applet (All); JTI Order Entry - Order List Applet (All); JTI Order Entry - Order List Applet (All) - Pos Type; JTI Order Entry - Order List Applet (All) Visit Home; JTI SR Sales Order Pick Applet; JTI Order Entry - Order List Applet (Sales) – Admin; JTI Account Activity Orders Applet; JTI JTI Order Entry - Order List Applet; JTI JTI Order Entry - Order List Applet (Sales) – DD; JTI My Account Order Entry Order List Applet (Sales); JTI Order Entry - Order List Applet (Sales); JTI Order Entry - Order List Applet (Sales) – DD; JTI Order Entry - Order List Applet (Transfer); JTI Order Signature Capture Signotec

The field should be RO for the users. ~~but populated automatically once ‘Order Type’ associated to the ‘Order Category’ is selected. This applies to Backend and Mobile.~~

The field should be hidden by default and displayed using ‘Columns Displayed’ option for V1

Order category would be mapped to the ‘Order Type’ values. There should be a way to configure the mapping between Order Type and Order Category. Proposing to use ‘Sub Type’ field on the LOVs list to configure this.

@ODC: To assess which is the best option to achieve this. Once market is requesting new Order Type, Order Category should be also provided.

An example of the mapping of the order category to market order types could look the following:

|  |  |  |
| --- | --- | --- |
| Order Category | Order Type | Market |
| Transfer Order | Already existing | Austria |
| Attribution Pre-Sale | Switzerland |
| BDE | France |
| Campaign | Portugal |
| Direct Order | Ireland |
| Discount Order | Sweden |
| Duty Free Order | Czech Republic; Ireland |
| E-Cig | France |
| EDI Order | Ireland |
| Enquiry Order | Ireland |
| External Order | Germany |
| Inhouse order | Germany; Switzerland, Austria |
| Introduction | Portugal |
| Not interested | Austria |
| OOS | Portugal |
| Order | Kazakhstan, Czech Republic, Germany, Poland, Serbia, Ukraine, Belgium, France, Italy, Netherlands, Switzerland, Austria, Ireland, Portugal, Sweden, Russia, United Kingdom |
| Out of stock | Romania |
| Pre-book | United States |
| Pre-Order | Sweden |
| Pre-Sale, Pre-sale order, Preselling | Kazakhstan, Czech Republic, Poland, Serbia, Ireland, Portugal, Sweden, United Kingdom, Romania, Germany, Switzerland, Austria, Poland |
| Promo Pre-book | United States |
| Recomm. (self collected) | Austria |
| Recomm. (self-order later) | Austria |
| Recommendation | Austria |
| Regular Order | Korea |
| Replenishment | Portugal |
| Retailer Detail Order | Canada |
| Retailer Order Reminder | Canada |
| Sales, Sales Order | Kazakhstan, Czech Republic, Poland, Serbia, France, Ireland, Portugal, Sweden, United Kingdom, Czech Republic, Germany, Romania, Ireland |
| SAP Order | Ireland |
| Supplier Purchases | United States |
| TEP Order | Ireland |
| TO - No Stock | United Kingdom |
| TOSL Order | United Kingdom |
| Transfer, Transfer Order | Poland, Kazakhstan, Germany, Ukraine, France, Portugal, Sweden |
| Volume Negotiation | Spain |
| Excar Order | Ex-car Delivery | Belgium |
| AOF Order | United Kingdom |
| Bill Through | United States |
| Cash Order | United Kingdom |
| Cash Sale | Canada |
| Direct Sales | Canada |
| Direct Sales GTA | Canada |
| Direct Sales RRP | Canada |
| Ex-Car | Switzerland, Austria |
| Ex-Car Delivery | Kazakhstan, Korea, Taiwan, Czech Republic, Germany, Poland, Romania, Serbia, Belgium, Netherlands, Switzerland, Malaysia, Austria, Canada, Ireland, Portugal, Spain, Sweden, Russia, United Kingdom, United States |
| Ex-Car Order | Czech Republic, Ireland |
| Ex-Car Order (Cash) | Czech Republic, Ireland |
| Retailer Cash Sale | Canada |
| Telesales Order | Telesales Order | Ireland |
| Web Order | Web Pre-Sales | Switzerland |
| Web Sales Order | Czech Republic, Ireland |
| Web Order RRP | Canada |
| Web Order | Ireland |
| Web Order RMC | Canada |
| Return Order | Web Pre-Sales | Switzerland |
| Return | Belgium, BE; Netherlands, NL; Canada, CA; Ireland, IE; Portugal, PT; Spain, ES; Sweden, SE; United Kingdom, UK; Switzerland, CH; Kazakhstan, KZ; Czech Republic, CZ; Germany, GE; Poland, PL |
| Exchange Order | Exchange Current | Belgium, Netherlands |
| Switch-Selling | Switzerland |
| Exchange | Ireland |
| Exchange | Portugal, Sweden |
| Exchange Current | Ireland, Portugal, Sweden |
| Replacement | Sweden |
| Swap Order | Ireland |
| Switch Selling | Ireland, Portugal, Sweden, Austria |
| Exchange | United Kingdom, United States |
| Exchange Current | United Kingdom |
| Swap Order | United Kingdom |
| Switch Selling | United Kingdom |
| Switch Selling | Kazakhstan |
| Exchange | Czech Republic |
| Exchange | Poland |
| Exchange Current | Czech Republic, Poland |
| Switch Selling | Czech Republic, Poland, Germany |
| Service Order | Car Stock return to Cage | Canada |
| Commercial Use | Belgium, Netherlands |
| Defective | Belgium, Netherlands |
| Delegate | Austria, Spain, Poland |
| Delegate FF | Spain |
| Dry - Stock | Spain |
| FF Delegate | Austria, Spain, Kazakhstan, Poland |
| HV Premiums | Netherlands, Belgium |
| Incentive Expiration | Sweden |
| Office Supplies | Belgium, Netherlands |
| Order | Spain |
| Personal Use | Belgium, Netherlands |
| Purchase Order | United Kingdom, United States |
| Receive | Czech Republic, Germany, Poland, Belgium, Netherlands, Switzerland, Austria, Sweden, United Kingdom, Kazakhstan |
| Return Bad | Belgium, BE; Netherlands, NL |
| Return FF | Poland, Austria, Kazakhstan |
| Return Incentive Whr | Sweden, SE |
| Returns - Bad | Spain, ES |
| Service Order | Poland, PL |
| Stock Adjustment | Sweden, SE |
| Stock Borrowed Order | United Kingdom, UK |
| Stock In | Canada, CA |
| Stock Out | Canada, CA |
| Stock Returned Order | United Kingdom, UK |
| TM Receive | Belgium, Netherlands |
| TM Supply | Belgium, Netherlands |
| Warehouse | Belgium, Netherlands |

For the TME CONNECT V1 markets the mapping should be the following:

|  |  |  |  |
| --- | --- | --- | --- |
| Order Category | Order Type | Market | Comment |
| Transfer Order | Order | Italy |  |
| Service Order | Stock Request | Spain |  |
| Stock Receive | Spain |  |
| Stock Return | Spain |  |

Please refer to CHG212583 where it’s described usage of the order category in the buying groups

## English Captions

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Type - Field | Format | Caption ENU | Language | Caption LOCAL |
| JTI Order Category | LOV | Order Category | ITA | Categoria ordine |
| JTI Order Category | LOV | Order Category | ESN | Categoría de pedido |
| JTI Order Category | LOV | Order Category | CSY | *TBD* |

Translations for other languages/markets to be provided.

## 2.3 Changes in the ETL

For TME Connect, the analytic platform will be Power BI, so changes for the ETL are also related to the PBI transfer instead of OBIEE.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | OLTP Source | | ETL | BI Target | |
| # | **Entity** | **Attribute** | **Transformation** | **Entity** | **Attribute** |
|  | Order Header | Category |  | Order Header | Category |

## Initial Loads/Massive Data updates

Update on the mapping of existing order type to the newly created order category field

## Performance test/Indexes creation

Not applicable

## Changes in BI

Order Category should be added in BI

## Data Dictionary

Please, add field “Order Category” to the Data Dictionary. It indicates order classification at global level

## Changes in Data Interfaces

## Inbound

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Inbound OLTP – OT, SI | | | | | |
| **#** | **Entity** | **Field Name** | **Contents** | **Data type/format** | **Transformation** |
| 1 | OT | Category | Order Category | Text |  |
| 2 | SI | Category | Order Category | Text |  |

## Outbound

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Outbound OLTP - SO* | | | | | |
| # | **Entity** | **Field Name** | **Contents** | **Data type/format** | **Transformation** |
|  | SO | Category | Order Category | Text |  |

## Initial Loads

Not applicable

## Performance test / Indexes creation

Not applicable

## Changes in Batch Processes / Aggregations / DRP

Not applicable

## Use Case

|  |  |  |
| --- | --- | --- |
| Role  *Trade Marketer, ASM, Local Admin…* | Application  *Sales, Analytics, ETL, Batch, Interface* | Step  *Description of the step and its expected output* |
| Trade Marketer | Mobile App | Create order on mobile, add products and quantities and submit  Synchronize Mobile app |
| Local Admin |  | Verify that the order created on mobile has a proper category populated |
|  |  |  |