Oracle® Retail Point-of-Service

Configuring Siebel in an Oracle Retail Point-of-Service to Siebel Integration

Release 13.4.1

E29189-01

March 2012

ORACLE RETAIL

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Integration Assumptions

The following are assumptions to consider for the Oracle Retail Point-of-Service to Siebel integration:

- Store Inventory Management, Point-of-Service, and Siebel must have matching item/product, pricing, and promotion information. The expectation is that Point-of-Service receives item/product information in the Data Import (DIMP) format. There is no new import process.
- Siebel is responsible for generating and printing an order contract.
- Point-of-Service uses the customer-preferred language when a Point-of-Service customer is linked to a Point-of-Service transaction.
- The printing of the external order contract is the responsibility of Siebel and is limited to Siebel's current functionality; so therefore might not be in the same language.
- Siebel field usage must not exceed the maximum size of Point-of-Service fields.
- Siebel part numbers must be valid Point-of-Service item/product identifiers. For example, hyphens (though valid in Siebel) are not valid characters for Point-of-Service IDs.
- Point-of-Service-to-Siebel integration assumes same currency is used in both store and Siebel. Store and Siebel organizations that map to the store should use the same currency.
- There is no syncing of the Oracle customer database and the Siebel customer database. Also, Point-of-Service does not send Siebel any customer information.
- Monthly recurring charges are defined in Siebel and back-end billing systems. This is done directly in Siebel. The Point-of-Service-to-Siebel integration treats such lines as 0 charge lines. The Point-of-Service transaction contains a line item/product to represent the monthly recurring charges; however the price will be reflected as 0.00 on the Point-of-Service transaction.
- Item/product description displayed on the Point-of-Service screen or receipt comes from Point-of-Service. The only exception is for an unknown item/product. For an unknown item/product, the description comes from Siebel.
- Siebel pricing computes the pricing for items/products in Siebel and sends the net price that Point-of-Service uses for displaying and printing on a receipt.
- Line items from an external order are represented in Point-of-Service as individual items (they are not represented as a kit).
- For returns or cancellations that impact assets in Siebel, it is recommended to initiate disconnect orders (treated as returns for physical goods) from Siebel.
- The integration assumes that for retail channel, Point-of-Service will compute the tax for orders received from Siebel and update the Siebel order with computed tax. Siebel tax engine should be disabled for tax computation for Point-of-Service integration. This can be accomplished by configuring two object managers in Siebel:
  - One for store with the tax engine disabled
  - One for call center with the tax engine enabled

If this approach is not followed, Siebel, and Point-of-Service must integrate to the same tax engine in order for consistent tax treatment. If they do not have same tax engine, the tax will be calculated independently.

- Siebel is installed with Asset-Based Ordering (ABO) mode. Every physical (non-service) item/product needs to be configured as an asset in Siebel.
- Point-of-Service supports Sales Orders from the Siebel application. Other types of orders available in the Siebel application have not been tested with the integration.
- No partial orders are processed by Point-of-Service. Through Web service APIs, Point-of-Service retrieves a Siebel order in Ready To Tender status into a Point-of-Service transaction.
- The Adjustment NRC order-level field in Siebel will be ignored when Siebel Orders are read by Point-of-Service. Merchants should not utilize the Adjustment NRC field for any searchable external orders.
- Out of the box, Siebel does not allow for the price of a return order line item with an action code of Delete to be rolled up into the Total NRC field at the order level. Therefore, when Point-of-Service updates the return order, the amount that was refunded to the customer does not get rolled up into the Total NRC on the interface in Siebel. Instead, Point-of-Service updates Siebel's Adjustment NRC field (which is included in the Total NRC calculation) with the transaction's total return amount.
- Out of the box, Siebel does not allow posting back a negative payment amount. See Removing Order Total Validations for more information.
- Point-of-Service updates the order status in Siebel and does not update the order line item status in Siebel.
- Siebel should be configured to explode out items/products as individual items/products (not use multiple quantity feature).
- Point-of-Service supports Siebel shipping if the same carrier is shipping all items/products on the order, or shipping charge is specified in Siebel for each carrier if multiple carriers are specified. Otherwise, Point-of-Service displays an error dialog.

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Siebel Repository Changes

Configuring SSL in Siebel

Create a Custom Object Manager to enable SSL. To create a copy of the EAI Object Manager and set SSL:

1. Navigate to the Administration – Server Configuration > Enterprises > Component Definitions view. Use SADMIN login.
2. Query for **EAI Object Manager (ENU)**.
3. Select **Applet Menu> Copy Record**. A new record is created in the applet.
4. Update the Component field with **EAI Secure Object Manager (ENU)**.
5. Update the Alias field with **EAI_SecureObjMgr_enu**.
6. Update the Component Group field with **Enterprise Application Integration**.
7. Select **Applet Menu> Save Record**.
8. In Component Parameters applet, set the following parameters:
   a. Query for OM - Configuration File and set Value field to **eai_secure.cfg**.
   b. Query for SecureBrowse and set the Value field to **True**.
   c. Query for SecureLogin and set the Value field to **True**.
   d. Query for Maximum Tasks and set the Value to **20**.
9. Select **Applet Menu> Save Record**.
10. Log on to the machine where Siebel server is installed.
11. Navigate to the %root%\ses\siebsrvr\BIN\ENU directory. Copy the eai.cfg file and rename it **eai_secure.cfg**.
12. Activate the new object manager **EAI Secure Object Manager (ENU)**.
13. Bounce the Siebel server to make the new object manager available to use. Navigate to **Start >Administrative tools>Services**
14. Select **Siebel server […]** service. Stop the service.
15. Select **Siebel Gateway** name service. Stop the service.
16. Wait five minutes before restarting Siebel Gateway name service.
17. Wait an additional two minutes before restarting Siebel Server service.
18. Navigate to %ROOT%\ses\gtwysrvr\ADMIN\Webserver on the m/c where Siebel gateway server is installed.
19. Edit the eapps.cfg file.
20. Copy the **[/eai_enu]** section and paste the copied section next to the original with the new name **[/eai_secure_enu]**.
21. Update the Connect string with new object manager name, for example, **EAI_SecureObjMgr_enu**.
22. Save the file.
23. Navigate to %ROOT%\ses\gtwysrvr\ADMIN\Webserver.
24. Edit the eapps_virdirs.bat file.
25. Locate the entry for eai_ %1.
26. Copy the line and paste it with updated name **eai_secure_%1**.

27. Save the file.
28. Start the reconfiguration by double-clicking **ssincfgw.exe** in %ROOT%\eappweb\BIN. A wizard opens.
29. Select **Configure Product in Live mode** and click **Next**.
30. Select **Siebel Web Server Extension Configuration** and click **Next**.
31. Select **Apply an SWSE Logical Profile** and click **Next**.
32. Select **Single Siebel Server** and click **Next** unless you have a load balancer in use.
33. Verify the connection Broker port from the log file: %root%\ses\siebsrvr\log\siebel.'hostname'.log. Search for **Siebel Connection Broker**.
34. Provide Siebel server Host name and Siebel Connection Broker Port and click **Next**.
35. Locate %ROOT%\ses\gtwysrvr\ADMIN\Webserver as your logical profile location. Click **Next**.
36. Click **Next** on the Final task view.
37. Verify your selections on this screen and click **Next**.
38. Confirm to make the changes.
39. Verify that the virtual directories are created and the IIS Webserver is updated with the new Website.
40. Stop and start the World Wide Web Publishing service from the services window.
41. Open the IIS 6 Administration window.
42. Navigate to **Local Computer > Web sites > Default Web Site > eai_secure_enu**.
43. Double-click and verify the directories are present as in eai_enu Website.

Deep Cloning/Activation of Web Service

The Point-of-Service-to-Siebel integration is accomplished using a Web service that was inactive in a Siebel out-of-the-box installation. Since some merchants might customize this Web service, the Point-of-Service-to-Siebel integration is based on a new Web service and new components that are generated by deep cloning of an existing Web service, integration and business service objects.

This section explains how to create and activate the new Web service, and how to clone the Siebel components on which the Web service depends.

> **Note:** These steps must be performed using non-customized Web services and components. See Siebel documentation for steps to export/import cloned services and components from a non-customized installation.

Deep copy the existing Integration Object as follows:

1. Log on to Siebel Tools using sadmin login.
2. In the Object Explorer, select the Integration Object Type. If you do not see the Integration Object, go to **View>Objects>Objects Explorer** and make the object visible.
3. In the Object List Editor, query for integration object **WC_Order_Entry_IO**.
4. Lock the Project **Custom UI Samples** to which IO **WC_Order_Entry_IO** is added (**Tools > Lock Project**).
5. Right-click and select **Copy**.

6. Name the new object **ORPOS_Order_Entry_IO** and change the inactive property to False and change **XML Tag** to **ListOfORPOS_Order_Entry_Io**.
7. In the Object Explorer, select **Integration Object User Prop** and update the records **XMLTagNamespace** and **XSDTypeNamespace** with new IO name **http://www.siebel.com/xml/ORPOS_Order_Entry_IO**.
8. Step out of the record to save it.

Deep copy the existing business services as follows:

1. In the Object Explorer, select the Business Service object type.
2. In the Object List Editor, query for business services **WC_Orders_BS**.
3. Right-click and select **Copy**.
4. Name the new object **ORPOS_Orders_BS** and change the inactive property to False.
5. In the Object Explorer, select Business Service then select the Business Service Method Arguments.
6. Update the integration object attribute to **ORPOS_Order_Entry_IO** for all the method arguments where data type is **Integration Object** (this must be done for all operations).
7. Copy and paste the existing siebel.sia.srf file in `%root%\8.1\Tools_1\OBJECTS\ENU`.
8. Change the name of the newly created srf to **ORPOS_Siebel.srf**.
9. Compile the changes to the `%root%\8.1\Tools_1\OBJECTS\ENU\ORPOS_Siebel.srf` file.
10. Move the srf file to `%root%\ses\siebsrvr\OBJECTS\ENU`.
11. Deploy the updated srf file to the server application (eCommunications and EAI object managers) and tools.

Deploy an srf file to EAI and eCommunications object managers:

1. Go to **Siebel Application > Sitemap > Administration- Server Configuration**.
2. Select Component Definitions and query for EAI Object Manager (ENU).
3. Right-click **Start Reconfiguration** in the Component Parameters view.
4. In the lower Parameters applet click **Advanced**, then query for Application Repository File update.
5. Update the value with new srf name (for example, ORPOS_siebel.srf).
6. Go to the Component Definitions applet and right-click on EAI Object Manager (ENU) and select **Commit Reconfiguration**.
7. Repeat the previous steps for any other Object Manager that need to be updated (EAI Secure Object Manager and eCommunications)
8. Log out of Siebel UI and log back in again, in order to see the changes.

Create a new Web service and activate it:

1. Go to the Administration - Web Services screen, then the Inbound Web Services view.
2. Create a new record with name space **http://siebel.com/ORPOS/Order** and name **ORPOS_Order_WebService**, with a status of **Inactive**.
3. Create a new service port with the following parameters:
   - Name – ORPOS_ORDER_PORT
   - Type – Business Service
   - Business Service – ORPOS_Orders_BS

- Transport – HTTP
- Address – TBD
- Binding – SOAP_DOC_LITERAL

4. Create a new operation in the lower applet with the following parameters:
   - Name – ORPOS_Execute
   - Method – Execute
   - Authentication type – None
5. Create a new operation in the lower applet with the following parameters:
   - Name – ORPOS_QueryPage
   - Method – QueryPage
   - Authentication type – None
6. On the top applet select the Web service ORPOS_Order_WebService and update the state to **Active** and click **Clear Cache**.
7. Highlight the Web service record and click **Generate WSDL** on the applet.
8. Save the WSDL in a location in your local directory and compare it with the Point-of-Service-provided WSDL copy to make sure the Web service is created as per the requirement.

For more information about the WSDL, see the *Oracle Retail POS Suite Implementation Guide, Volume 4 – Oracle Retail Point-of-Service to Siebel Integration*.

Now this new Web service is ready for testing. Use SoapUI to test the Web service.

Siebel Validation

Out-of-the-box, Siebel does not allow posting back a negative payment amount and overextending. To get past this limitation, the payment validation at the order level is removed and the limits on payment validation are modified.

Removing Order Total Payment Validations

Do the following to remove order total payment validations:

1. Log in to Siebel tools and query for **Order Entry - Orders** in the Business Component explorer.
2. Select Bus Component user **Prop** in the explorer.
3. Query for **Validate Payment** in name, and set the value **N** in value field.
4. Query for **Payments** in the Business Component explorer.
5. Select Bus Component user **Prop** in the explorer. Lock the object.
6. Query for **Validate Payment** in name and set the value **N** in value field.
7. Copy and paste the existing siebel.sia.srf in `%root%\8.1\Tools_1\OBJECTS\ENU` and then change the name of the newly created srf to ORPOS_Siebel.srf.
8. Compile the changes to `%root%\8.1\Tools_1\OBJECTS\ENU\ORPOS_Siebel.srf`
9. Move the srf to `%root%\ses\siebsrvr\OBJECTS\ENU`.
10. Deploy the updated SRF to the server application (eCommunications and EAI object managers) and tools.

Payment Limits/Status Updates

Do the following to fix an incorrect payments status update:

1. Log in to Siebel tools and query for **Payments** in Business
2. In the object explorer, select **Field** and query for **Payment Method**.
3. In the object explorer, expand the field to the child Pick Map.
4. Query for **Payment Status** and check **Inactive** field to mark it **true**.
5. Copy and paste the existing siebel.sia.srf file in `%root%\8.1\Tools_1\OBJECTS\ENU` and then change the name of the newly created srf file to ORPOS_Siebel.srf.
6. Compile the changes to the `%root%\8.1\Tools_1\OBJECTS\ENU\ORPOS_Siebel.srf` file.
7. Move the srf to `%root%\ses\siebsrvr\OBJECTS\ENU`.
8. Deploy the updated SRF to the server application (eCommunications and EAI object managers) and tools.

Do the following to modify payment limit validations:

1. Log in to Siebel tools and query for **Payments** in Business.
2. Select bus component user **Prop** in the explorer.

   The following table lists the available user properties for setting the limits. The value field against each will be the enforced limit. The default value is **0**.

Payment Limit Validations

Name	Value	Description
Minimum CC Txn Amount	-99999	Sets the minimum amount payable by credit card when entering a payment line.
Minimum Cash Txn Amount	-99999	Sets the minimum amount payable by cash when entering a payment line.
Minimum Check Txn Amount	-99999	Sets the minimum amount payable by check when entering a payment line.
Minimum Purchase Txn Amount	-99999	Sets the minimum amount payable by purchase order when entering a payment line.
Minimum Stored Txn Amount	-99999	Sets the minimum amount payable by stored value when entering a payment line.
Minimum Wire Txn Amount	-99999	Sets the minimum amount payable by wire transfer when entering a payment line.

3. Copy and paste the existing siebel.sia.srf in `%root%\8.1\Tools_1\OBJECTS\ENU` and then change the name of the newly created srf to ORPOS_Siebel.srf.
4. Compile the changes to the %root%\8.1\Tools_1\OBJECTS\ENU\ORPOS_Siebel.srf file.

5. Move the srf to `%root%\ses\siebsrvr\OBJECTS\ENU`.
6. Deploy the updated SRF to the server application (eCommunications and EAI object managers).

Setting Up View Modes

All Query requests from Point-of-Service sent to Siebel use view modes. See Siebel documentation for detailed information on how to set up view modes. For testing purposes only the following two view modes are used:

- Organization
- Sales Rep.

Do the following to set up view modes:

1. Log in to Siebel tools and query for Order Entry - Orders in Business Component explorer.
2. Select Bus Comp View Mode in the explorer.
3. You should see three records for the following view modes as active by default:
   - **Organization**
   - **Sales rep**.
   - **Personal**
4. If any of them is not present, please add a new record for the missing view mode and compile the changes in to the new srf file and deploy the srf file to the server.

3

Siebel Administration Changes

Setting Up Security Methods/Types

The integration between Point-of-Service and Siebel works with either Siebel Security or Web Services Security enabled. The integration will not work with both Siebel Security and Web Services Security enabled. Choose one security protocol only to enable.

Setting Up Siebel Security

Do the following to set up Siebel security:

1. Go to **sitemap > Administration – Web services**. Use SADMIN login.
2. Select inbound Web services.
3. Query for the Web service in use, for example **ORPOS_Order_WebService**.
4. Go to Operations applet.
5. Verify that the parameter **Authentication type** has a value of **None**.
6. Click **Clear Cache** to refresh the server with the changes.

Setting Up Web Services Security

Do the following to set up Web Services security:

1. Go to **sitemap > Administration – Web services**. Use SADMIN login.
2. Select inbound Web services.
3. Query for the Web service in use, for example **ORPOS_Order_WebService**.
4. Go to Operations applet
5. Update the parameter **Authentication type** to the value of **Username/Password - clear text**.
6. Click **Clear Cache** to refresh the server with the changes.

Exporting a Certificate

Prerequisite:

An SSL Certificate needs to be installed prior to exporting it.

Do the following to install self-signed SSL certificates to an IIS server installed in a Windows environment. For other environments, follow the Siebel Book Shelf:

1. If not existing, download the selfssl resource kit from `http://www.microsoft.com/downloads/details.aspx?FamilyID=56fc92ee-a71a-4c73-b628-ade629c89499&displaylang=en`.
2. Install the software for self ssl 1.0.
3. Start the selfssl. Go to **Start > All Programs > IIS Resources > SelfSSL > SelfSSL**.
4. A command window appears with SelfSSL command options.
5. Run the command **selfssl** with options **/N:cn=<Computer domain name> /V1000 /T**.

   For example, computer domain name: `exampledomain.corp.siebel.com`

   This will install a self-signed SSL certificate on the Machine running IIS6 server.

Do the following to export the certificate for use by ORPOS Server:

1. Open the IIS 6 Administration window.
2. Go to Local Computer > Web sites > Default Web site. Right-click and select **properties**.
3. Select the tab Directory Security.
4. Click **Server Certificate**. The Web server certificate wizard appears.
5. Click **Next**.
6. Select the option to export the current certificate to a .pfx file.
7. Enter the path and file name and click **Next**.
8. Enter the password for the file and click **Next**. The certificate file is stored in the location defined.
9. Copy the file and send to the ORPOS server where it is imported.

See the *Oracle Retail POS Suite Siebel Integration Guide* for details about importing the certificate into Oracle Retail Point-of-Service.

Configuring Price Lists

Point-of-Service and Siebel must have matching item, pricing and promotion information. The expectation is that price list is configured in Siebel for all matching items.

Disabling Tax

Point-of-Service is responsible for calculating tax. It is assumed that Siebel does not enable its tax engine in the store.

Do the following to verify that the Tax Engine is disabled in the Siebel application:

a. Go to **Siebel Application > Sitemap > Administration- Server Configuration**.
b. Select **Component Definitions** and query for **Object Manager**.
c. In the lower Parameters applet query for **Enable Sales Tax** in **Name** field.
d. Verify the value in field **Value** is **False**.

Adding New Order Status Codes

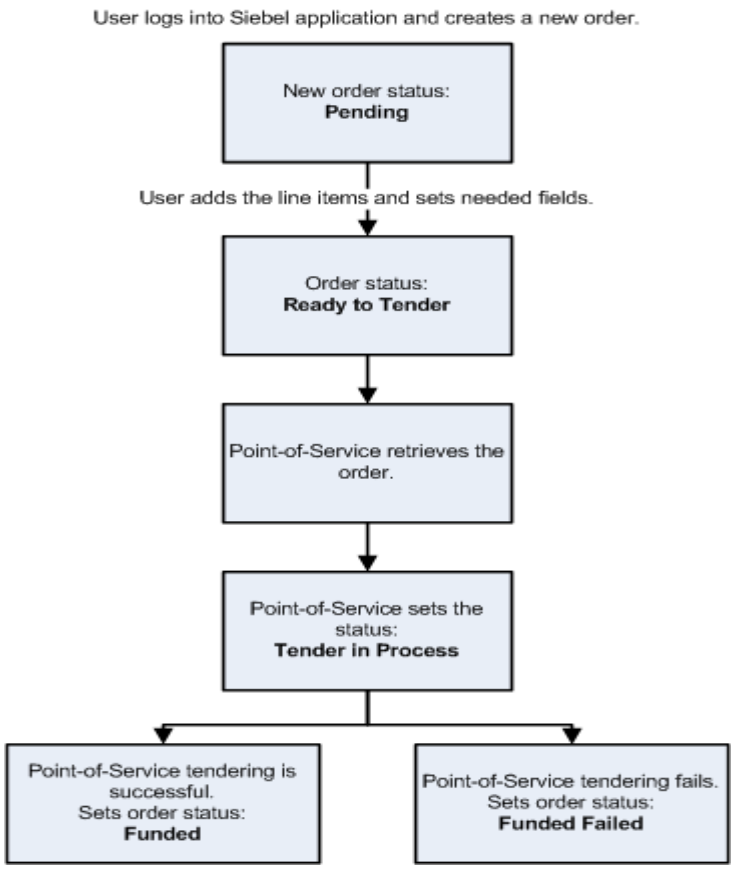
For this integration, the following order status codes are used:

- Tender In Process – indicates the Point-of-Service client has reserved order for tendering.
- Ready To Tender – indicates to the Point-of-Service client that the order is ready to be funded.

  No partial orders are processed by Point-of-Service. Through Web service APIs, Point-of-Service retrieves a Siebel order in Ready To Tender status into a Point-of-Service transaction.
- Pending – indicates the Point-of-Service client has rejected the order due to incomplete information being provided.
- Funded – indicates that an order was funded in Point-of-Service.
- Funded Failed – If the funding process fails in Siebel, the status gets set to Funded Failed. For example, if a product exists in Point-of-Service but does not exist in Siebel.

- Tender In Process, Funded, Funded Failed and Ready To Tender are new order status codes that are used by the integration out-of-the-box. However, the statuses are configurable in Point-of-Service and can be set to any value.

Order Status Transition



Note: If the order is cancelled in Point-of-Service, the status in Siebel is updated back to Ready to Tender.

Do the following to add new Order Status Codes:

1. Go to **Sitemap > Administration – Data > List Of Values**.
2. Query for a record FS_ORDER_STATUS in Type field.
3. Copy a record and update the empty fields with the new status code.
4. Set the appropriate sequence number and save the record.
5. Click **Clear Cache** to refresh the server cache.
6. Repeat the above procedure for all the status codes:
   - Ready To Tender
   - Tender In Process
   - Funded
   - Funded Failed

Write-in Products

Write-In-Product is a generic product in seed data of Siebel Applications. It is used to insert a product that is unknown to Siebel, in a quote or order. It is expected that this product will be available to use in all Siebel installations.

Verifying Write-In Products

If an item unknown to ORPOS is added as an accessory to a Point-of-Service External Order transaction, the item is added to Siebel as a Siebel write-in product. The part number used for a write-in product is configurable in Point-of-Service. Pick a write-in product in Siebel and configure Point-of-Service to use it. See the *Oracle Retail POS Suite Implementation Guide, Volume 4 – Oracle Retail Point-of-Service to Siebel Integration* for more information.

Do the following to verify a write-in product:

1. Go to **Sitemap > Administration – Product**.
2. Query for the product **Write-In-Product** in the Name field.
3. Verify that its part number is **SEBLRSVWIP1**.
4. Verify that it is in **Active** status.

Verifying Asset-Based Ordering (ABO) Mode

In order to handle returns, it is assumed that Siebel is always installed with Asset-Based Ordering (ABO) mode. Every physical (non-service) item must be configured as an asset in Siebel. ABO mode supports delta orders, while non-ABO does not have a delta calculation.

Do the following to verify Asset-Based Ordering mode:

1. Go to Siebel Application > Sitemap > Administration- Server Configuration.
2. Select **Component Definitions** and query for Object Manager (both eCommunications and EAI)
3. In the lower parameters applet query for Order Management - Enable Asset in Name field.
4. Verify the value in field Value is **True**.

Adding New Credit Card Types

If the House Card tender is to be used in Point-of-Service, then a new payment type code **HouseCard** must be added to Siebel.

Do the following to add new payment types:

1. Go to **SiteMap -> Administration - Data -> LOV Explorer**.
2. In the List Of Values -Type applet, query for **PAYMENT_TYPE_CODE** in the **Type** field.
3. In the left explorer applet, expand the box named **Types** by clicking on the plus (+) mark to the left of the box.
4. Expand the box **PAYMENT_TYPE_CODE**.
5. Expand the box **Values**.
6. In the right applet, look for the record with display value **Visa**.
7. Right-click and select **Copy**.

8. In the new record, update the display value and code with **HouseCard** and save the record.
9. From the applet menu, select **Clear Cache**.
10. Click **Types** in the left explorer applet.
11. In the List Of Values -Type applet, query for **PAYMENT_METHOD_CODE** in **Type** field.
12. In the left explorer applet, expand the box named **Types** by clicking on the plus (+) mark to the left of the box.
13. Expand the box **PAYMENT_METHOD_CODE**.
14. Expand the box **Values**.
15. Look for the value **Credit Card (English - American)** and click it.
16. In the right applet, select one of the child records. Right-click and select **Copy**.
17. In the new record, update the fields **Code** and **Display value** with the new value (for example, **HouseCard**).
18. From the applet menu, select **Clear Cache**.
19. Verify that the new value is available for use in **Sales orders -> Payments** view.

4

Siebel Order Data

Configuring Siebel Shipping

The integration assumes that the shipping carriers and shipping methods in Point-of-Service are either a subset of the shipping carriers and methods that are in Siebel or in sync with them.

Do the following to set Siebel shipping:

1. Go to **Sitemap > Sale Orders**.
2. Select the order for which you need to set up Siebel shipping.
3. Select the Shipping tab in the middle applet.
4. In the shipping view, enter the details for Order level shipping like address, carrier, priority and so on.
5. To set up line item level shipping, click the Line Items tab in the lower part of the middle applet.
6. Update the address, name, carrier, priority and so forth for each line item in the middle applet.
7. Save the record.

> **Note:** The order level shipping is not applied to any previously added order line items automatically.

Valid Return Orders (ABO Mode)

A return order is considered to be valid for this Point-of-Service integration if it satisfies the following requirements:

- The Siebel application is configured to use ABO mode.
- The order is created from the existing assets of an account by either clicking **Modify** or **Disconnect** buttons on the Asset applet or on the services Applet.
- The order line items contain at least one item with action code **Delete**.

Configuring Return Orders

Do the following to create return orders:

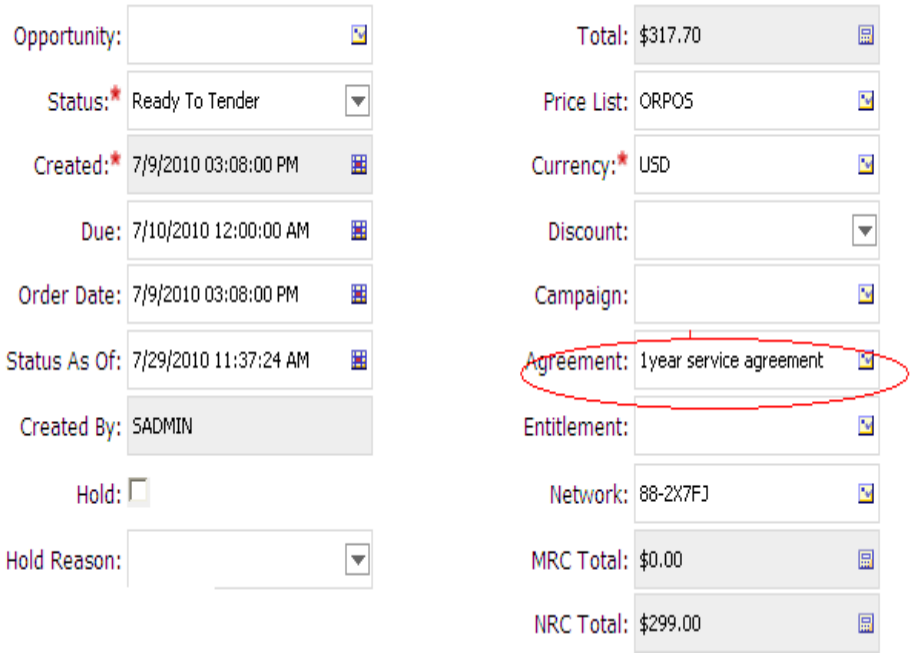
1. Go to **Sitemap > Sale Orders**.
2. Locate the sales order that you want to convert to the assets.
3. Click on the hyperlink in the Order Number field.
4. In the order detail view, click the Line Items tab.
5. Change the status of the line items that you want to convert to assets to **Complete**.
6. Change the status of the Order header to **Complete**.
7. Select one line item at a time and click **Auto Asset**.
8. Repeat for all the line items that you are converting to assets.
9. Click the **Service Account** hyperlink on the line item to go to the Account summary view.
10. The Assets are available in the Installed Assets applet.

11. Select the assets for which you want to create a return order.
12. Click **Disconnect** on the same applet.
13. You see a quote created with the selected assets as line items.
14. Click **Auto Order** on the Quote header applet.
15. You see the order created with return items.
16. Modify the order number if needed and verify that the line items Action code is **Delete**.
17. Change the status on the order header to **Ready to Tender** and save the record.

Capturing the Contract Signature Electronically

If an order has an agreement selected in the Agreement field, Oracle Retail Point-of-Service prompts the user to electronically capture the signature for the agreement.

Figure 3–1 ***Electronic Signature Agreement***

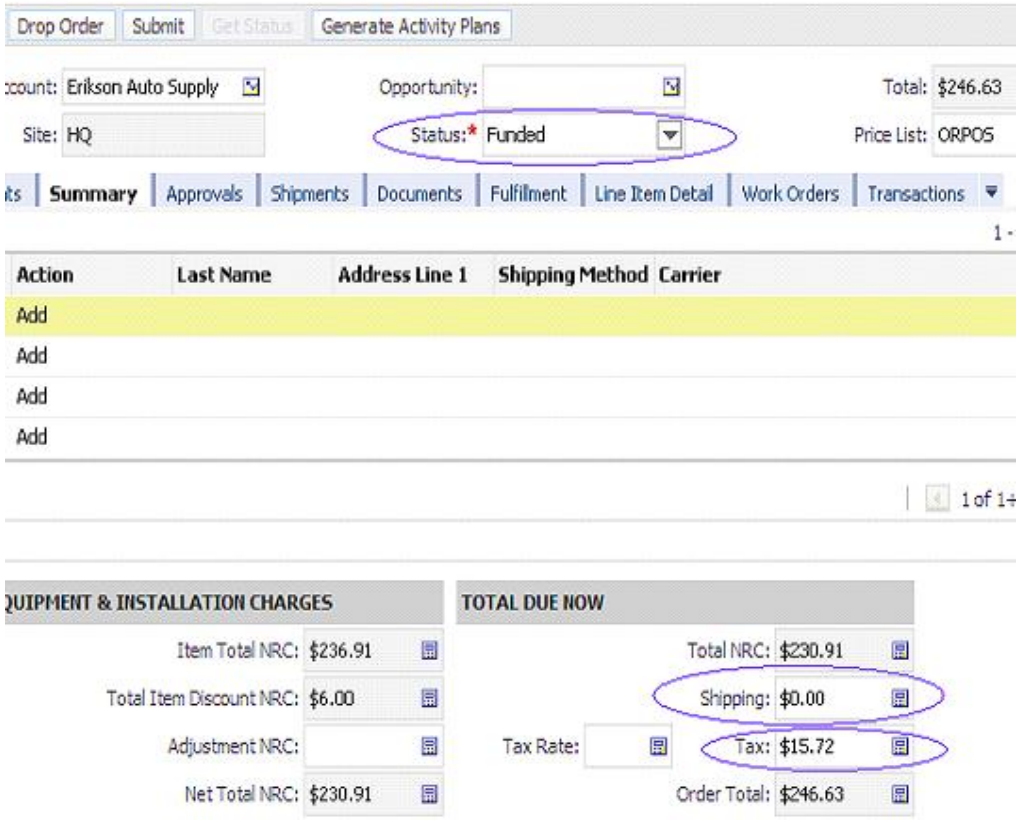


The Siebel Web service field used to store the Agreement is **AgreementId**.

Information Posted Back to Siebel Once a Transaction is Tendered in Oracle Retail Point-of-Service

Order

Figure 3–2 ***Order Posted in Point-of-Service***



Fields Updated by Oracle Retail Point-of-Service

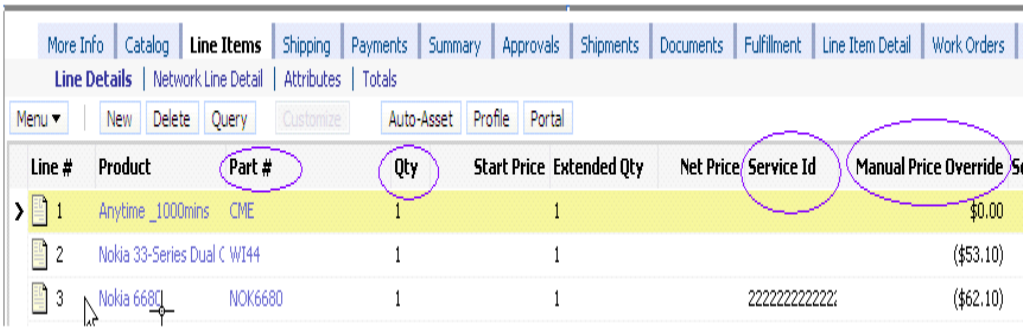
- Status is updated to **Funded**.
- Tax is updated to be the transaction tax amount calculated by Point-of-Service.
- Shipping is updated to be the combined total of all shipping charges applied in Siebel and Point-of-Service.
- Adjustment NRC is updated with the total return amount.

Fields Recalculated and Auto Updated by Siebel

- **Total NRC**: Rolls up all the non-recurring charges from the order line items.
- **Order Total**: Combined total of NRC, tax, and shipping charges.

Line Items

Figure 3–3 ***Line Items Updated in Point-of-Service***



A Sell Item from Siebel

The existing order line item in the Siebel order is updated by Point-of-Service.

- **Service Id** updated to capture the serial number of a serializable item.

A Return Item from Siebel

POS updates the service ID in Siebel for a Return Item.

A Known Accessory Sell Item Added in Oracle Retail Point-of-Service

A new order line item is created in the Siebel order with the following fields updated by Point-of-Service:

- **Part #** is updated to capture the point-of-sale item ID.
- **Qty** is updated to capture the item quantity.
- **Service Id** is updated to capture the serial number of a serializable item.
- **Manual Price Override** is updated to capture the unit price calculated by Point-of-Service.

> **Note:** There must be a pre-configured Siebel product with the specific part number, otherwise, an exception is logged indicating that the order update failed with an unknown product, the order status is updated to **funded failed** and the order must be manually updated.

An Unknown Accessory Sell Item Added in Oracle Retail Point-of-Service

A new order line item of a Write-In product is created in the Siebel order. A Write-In product is Siebel's way of handling an unknown product. All unknown items added in Point-of-Service use the same Siebel Write-In product. The Write-In product part number is configured in SiebelOrderFundedFormatter in RetailTransactionTechnician.xml on the Point-of-Service server side. The Write-In product of the specified part number must be pre-configured in Siebel:

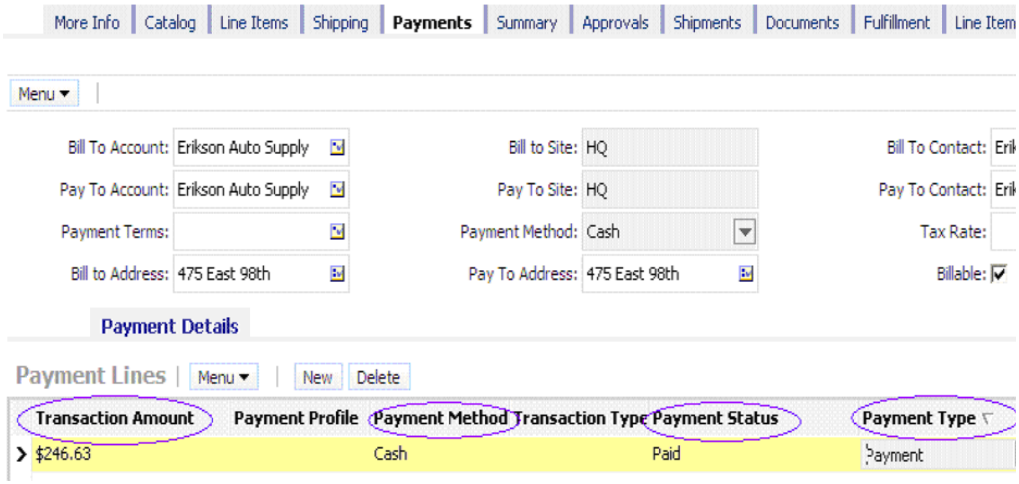
```
        <FORMATTER name="SiebelOrderFundedFormatter"
javaclass="oracle.retail.stores.formatter.siebel.FundedOrderFormatter">
            <PROPERTY propname="writeInPartNumber" propvalue="SEBLRSVWIP1"/>
...
        </FORMATTER>
```

The following fields are updated by Point-of-Service:

- **Part #** is updated to be the writeInPartNumber configured for SiebelOrderFundedFormatted (for example, SEBLRSVWIP1).
- **Qty** is updated to capture the item quantity entered in Point-of-Service.
- **Service Id** is updated to capture the serial number of a serializable item.
- **Manual Price Override** is updated to capture the unit price entered in Point-of-Service.

Payments

Figure 3–4 ***Payment Lines Updated in Point-of-Service***



Fields Updated by Oracle Retail Point-of-Service

One or more payment lines are created in the Siebel order, one for each tender used in the Point-of-Service transaction.

In each payment line, the following fields are updated by Point-of-Service:

- **Transaction Amount** is updated to capture the tender amount.
- **Payment Method**: A Point-of-Service tender type is mapped to a predefined Siebel payment method. The mapping is configurable in ExternalOrderMapping.xml on the Point-of-Service server side:

```
<OBJECT name="Method">
      <!--Maps Tender Type Codes (see
oracle.retail.stores.domain.tender.TenderTypeMap) to Siebel Payment Method-->
      <MAPPING name="CASH">Cash</MAPPING>
      <MAPPING name="CRDT">Credit Card</MAPPING>
      <MAPPING name="CHCK">Check</MAPPING>
      <MAPPING name="ECHK">Check</MAPPING>
    </OBJECT>
  </PAYMENT>
```

- **Payment Type**: For a charge card tender type, its card subtype (for example, AmEx) is mapped to a predefined Siebel payment type (for example, American Express). The mapping is configurable in ExternalOrderMapping.xml on the Point-of-Service server side:

```
<OBJECT name="CardType">
   <!--Maps Card Type Codes (see
oracle.retail.stores.domain.utility.CardTypeIfc) to Siebel
Payment Type -->
      <MAPPING name="AmEx">American Express</MAPPING>
      <MAPPING name="Visa">Visa</MAPPING>
      <MAPPING name="MasterCard">MasterCard</MAPPING>
      <MAPPING name="Discover">Discover</MAPPING>
      <MAPPING name="Diners">Diners Club</MAPPING>
    </OBJECT>
```

For a check tender type, its payment type is mapped to a predefined Siebel payment type **Personal** out of the box. The mapping is configurable in ExternalOrderMapping.xml on the Point-of-Service server side:

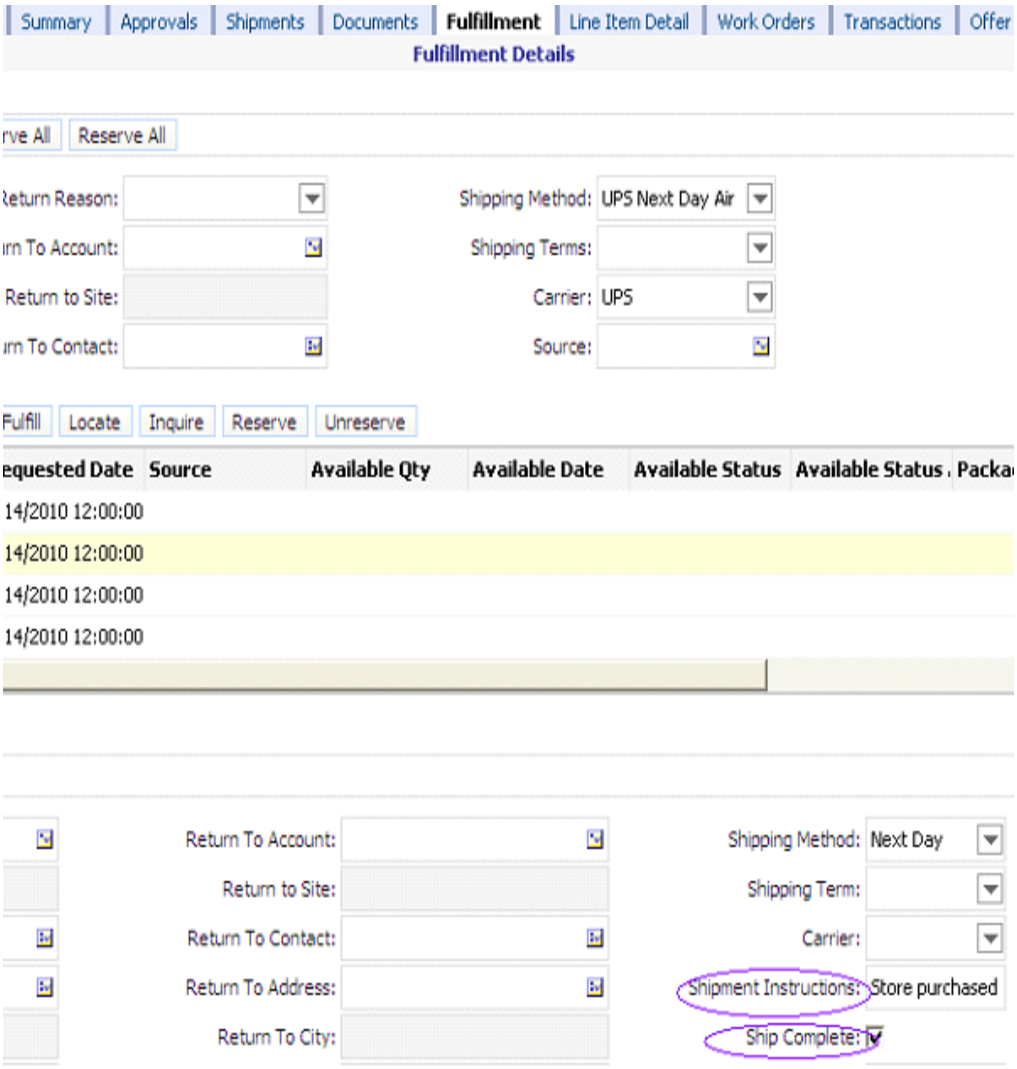
```
     <OBJECT name="CheckType">
      <!--Maps Check Tender Type Codes (see
oracle.retail.stores.domain.tender.TenderTypeMap) to Siebel
Payment Type -->
      <MAPPING name="CHCK">Personal</MAPPING>
      <MAPPING name="ECHK">Personal</MAPPING>
    </OBJECT>
```

- **Payment Status** is configurable in ExternalOrderMapping.xml on the Point-of-Service server side. Out of the box, the credit card tender type has a status of **Charged**, and all others have a status of **Paid**:

```
    <OBJECT name="Payment">
      <!--Defines the Siebel Status used for Types of Payment.
Maps Tender Type Codes (see
oracle.retail.stores.domain.tender.TenderTypeMap) to Siebel
Payment Status-->
      <MAPPING name="CASH">Paid</MAPPING>
      <MAPPING name="CRDT">Charged</MAPPING>
      <MAPPING name="CHCK">Paid</MAPPING>
    </OBJECT>
```

Fulfillment

Figure 3–5 ***Fulfillment Lines Updated in Point-of-Service***



Fields Updated by Oracle Retail Point-of-Service

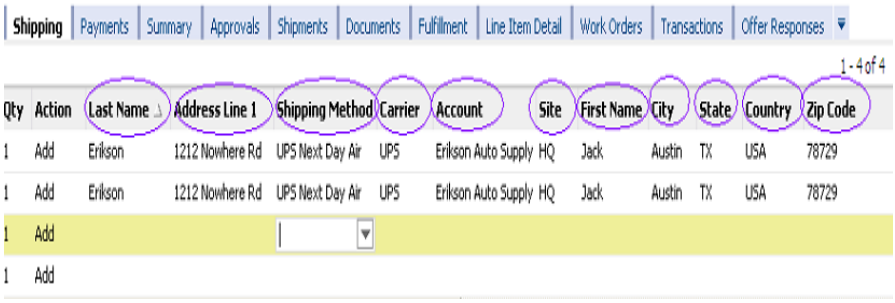
- **Ship Complete** is checked if the item is purchased in store or shipped from store inventory (when shipping is applied in Point-of-Service). It is unchecked if the item is shipping from Siebel warehouse (when shipping is applied in Siebel).

- **Shipment Instructions** is updated to have the text **Store purchased** if the item is purchased in store or shipped from store inventory; otherwise, the field is blank. The actual text is configurable in ExternalOrderMapping.xml on the Point-of-Service server side:

```
<SHIPPING>
  <!--Mapping for Siebel shipping instructions-->
  <OBJECT name="Instruction">
    <!--item shipped from the store-->
    <MAPPING name="Store">Store purchased</MAPPING>
    <!--item not shipped from the store or from warehouse-->
    <MAPPING name="NotShipped">Store purchased</MAPPING>
  </OBJECT>
</SHIPPING>
```

Shipping

Figure 3–6 ***Shipping Lines Updated in Point-of-Service***



Fields Updated by Oracle Retail Point-of-Service

The following fields should all be set to blank if the item is purchased in store or shipped from store inventory (when shipping is applied in Point-of-Service):

- Carrier
- Shipping Method
- Account
- Last Name
- First Name
- Address Line 1
- City
- State
- Country
- Zip Code
- Site

Troubleshooting

Point-of-Service rejects a Siebel order in the following instances:

- If an order item quantity is greater than one and meets one of the following conditions:
  - The item requires a serial number
  - The item has related items
  - The item is set to enter price required
  - The item is prohibited to change quantity
  - The item is a gift card item

  How to Fix: The order must be exploded in Siebel first.
- If an order has external shipping specified (shipping done from Siebel) and the Point-of-Service transaction already has a transaction level send.

  How to Fix: Either remove external shipping in Siebel, or cancel the transaction in Point-of-Service and create a new one without transaction level send.
- If all the required shipping information was not entered in Siebel, such as the following:
  - Shipping carrier
  - Shipping type
  - Shipping charge
  - Destination zip code

  How to Fix: Add the required shipping information to the Siebel order.

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