Order Experience Platform

USER MANUAL

Reach Us: OEP_DevTeam@dell.com

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Revision History:

Date	Version	Comments
8/19/2019	1.0.0	Single Order Page- 360 view
9/10/2019	1.0.1	Updated sections- Order Timelines & OEX score

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Introduction

With the fast-changing customer needs, enterprises are investing in variety of capabilities, acquiring companies and are adopting new business processes. Enterprises and are often seen moving away from monolithic architectures to more distributed IT landscape.
This increasing complexity in IT and with hundreds of applications internal and external participating in order life cycle, leads to gaps in E2E visibility causing fragmented customer experience.
Order Experience platform is our investment to define, streamline and simplify E2E order visibility for our business partners and equip them with capabilities to search, analyze, measure and take actions upon distresses across organization.

The definition of an order is varied across our enterprise, Sales Teams deal with Purchase (PO or DPID or IRN), back office Order management deals with Sales orders, our Factory deals with workorders and logistics with packages. Order Experience Platform (OEP) provides simplified view of these varied definitions of the order. Following are the primary features of OEP;

1. Order 360 View
2. Search capabilities
3. Order Summary Dashboard
4. Order Health
5. Order Milestones
6. Intuitive Order Time lines depicting Order stages and order statuses
7. Order Experience Score
8. Predictive Delivery date
9. Action Centers
10. Customizable Microsites
11. Watch-list capabilities
12. Saved searches
13. Reports
14. Manifest View
15. User management & Security

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Order 360 View

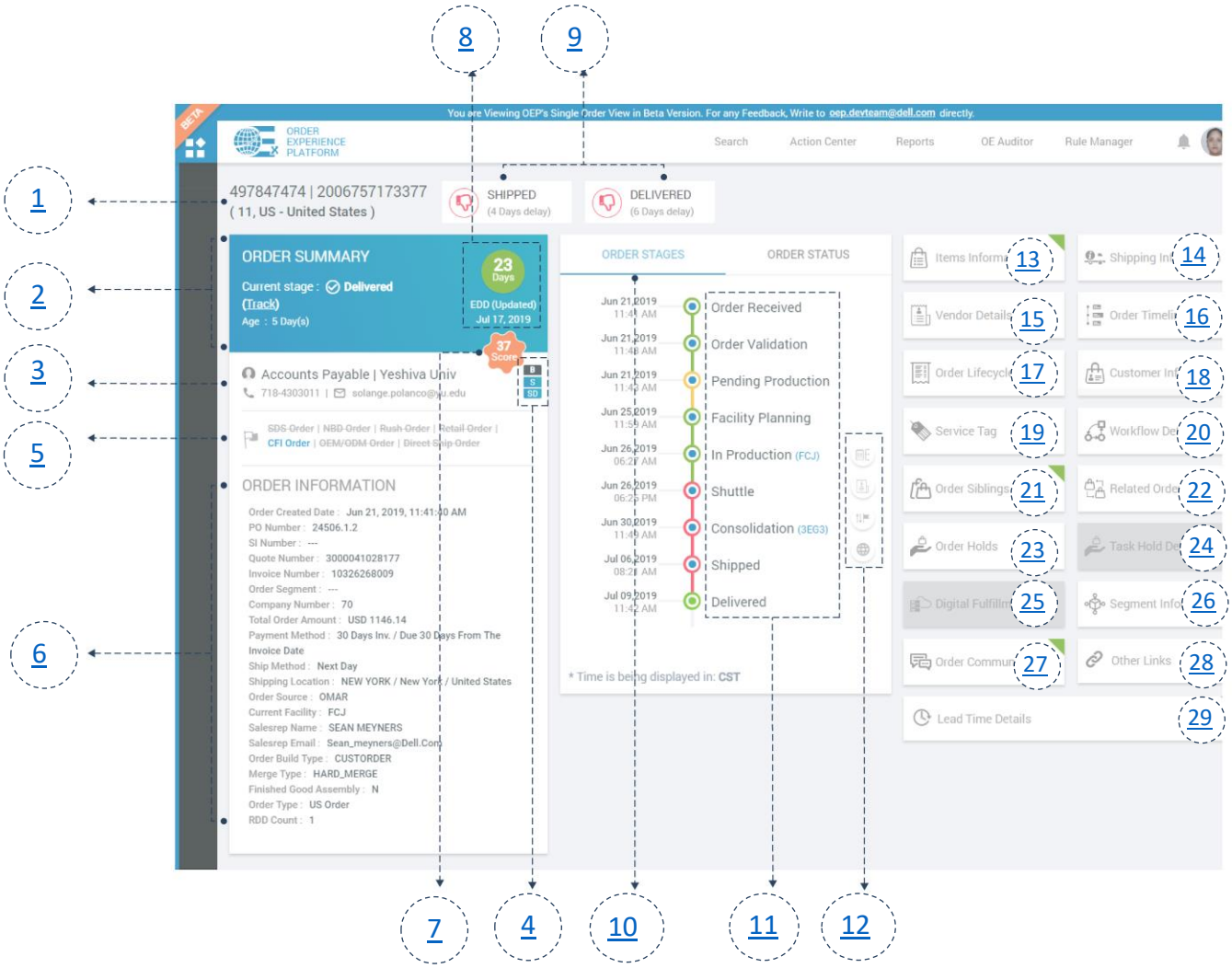

Figure 1 Order 360 view

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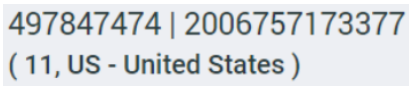
Single Order Page - Interpretation

On the single order page- order 360 view, user can get the complete details of the sales order such as the order status, order age, billing/shipping/sold to customer information, order timeline, items information, service tags, order holds, order siblings, shipping information, communication details and much more. The further sections will take you through the complete guide of order 360 view and where can a user look for their order details.

Order Information

Order Number –



In this section of order 360 View, user can see;

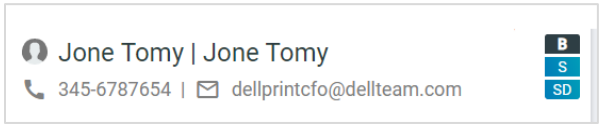
a. Sales Order Number
b. IRN (Internet Receipt number)
c. DPID (Dell Purchase Identifier)
d. BUID (Business Unit Identifier)
e. ISO Country Code
f. Country Name

Order Summary –

User can see the order summary containing the following information;

a. Current order Status/Stage (as per timeline chosen by user)
b. Total age of the order from the time of order booking
c. Current Hold and hold age (If any)

Customer Information Overview –



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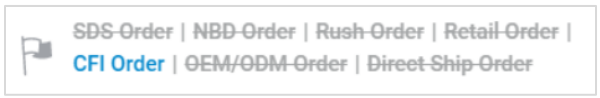
In this section user can see billed, shipped and sold to customer details by switching between ‘Bill to customer’, ‘Ship to customer’ and ‘Sold to customer’ to view their corresponding customer name, phone number and email address.
When user open the order 360 view, by default this section shows ‘Bill to Customer’ information.

BILLED/SHIPPED/SOLD CUSTOMER –

User can switch between these three buttons to see customer details of billed, shipped and sold to customers.

ORDER TAGS –



User can view the Order tags associated with the current order. Below are the order tags and their denotations;

a. SDS Order (Same Day Shipping order)
b. NBD Order (Next Business Day order)
c. Rush Order
d. Retail Order
e. CFI Order (Custom Factory Integration Order)
f. OEM/ODM Order (Original Equipment Manufacture/ Original Design Manufacturing Order)
g. Direct Ship Order

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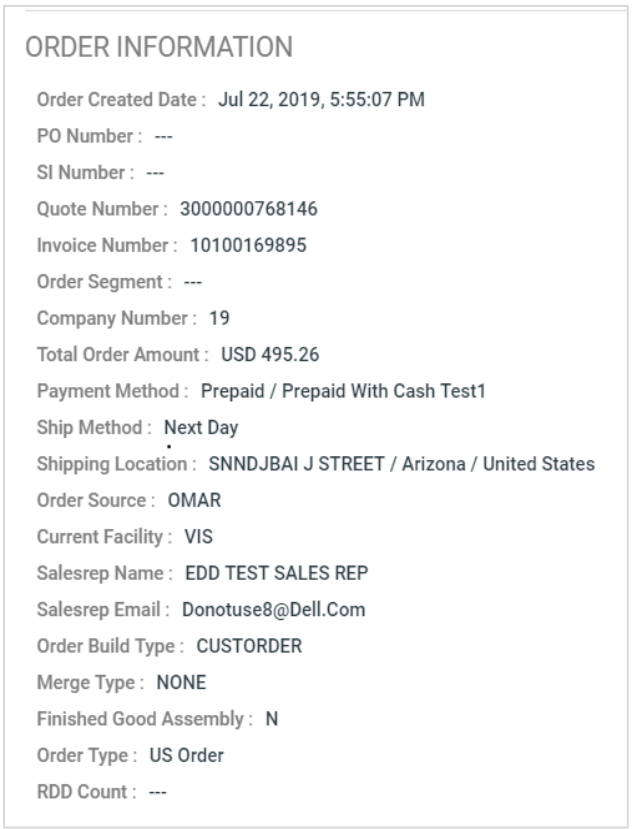
ORDER INFORMATION –

User can view the basic order information this section;

Order Information	Order created Date – Order creation date Purchase order number – PO number of the related orders SI Number – Service Integration number Company Number – Company number of the customer Order Source – Order initiated system Order Type – Type of the order	
Pricing Information	Quote Number – Quote generated for the sales order Invoice Number – Invoice number generated after the order delivery Total Order Amount – Total amount of the order Payment Method – Payment mode	
Sales & Shipping Information	SalesRep Name, SalesRep Email- Sales person information Order Build Type -- Shipping method – mode of shipping the order Merger Type – If any merging exits for the order Current facility- facility name currently the order is with	
Revised Date count	RDD Count - If the EDD is missed and RDD is calculated	

User can view the basic order information in this section, which includes Order Created Date, PO (Customer Purchase Order) Number, SI (Service Integration) Number, Quote Number, Invoice Number, Company Number, Total Order Amount etc.

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Order Experience Score –

User can see the order experience score for viewing order. This score is getting calculated with different experiences of the order. The rules are mainly set on following categories;

a. Delivery Commitment Revision
b. Invoicing
c. Logistics
d. Original Delivery Commitment
e. Order Processing Performance
f. Order Communications
g. Order Cancellation
h. Order Status Accuracy
i. Order Visibility
j. Miscellaneous

On the above set of categories, we define the rule condition and the score (positive/negative). In the order life cycle, accumulative of all the rules we provide the OEX score for each order.

Order Age/EDD –

User can see in this section the number of days lapsed from the time order was confirmed. This section gets updated with respect to the order health. (Currently its green as it's within the EDD)
EDD- Estimated delivery Date for this order is displayed and user can get further details if the EDD was updated.

Shipping/Delivery –

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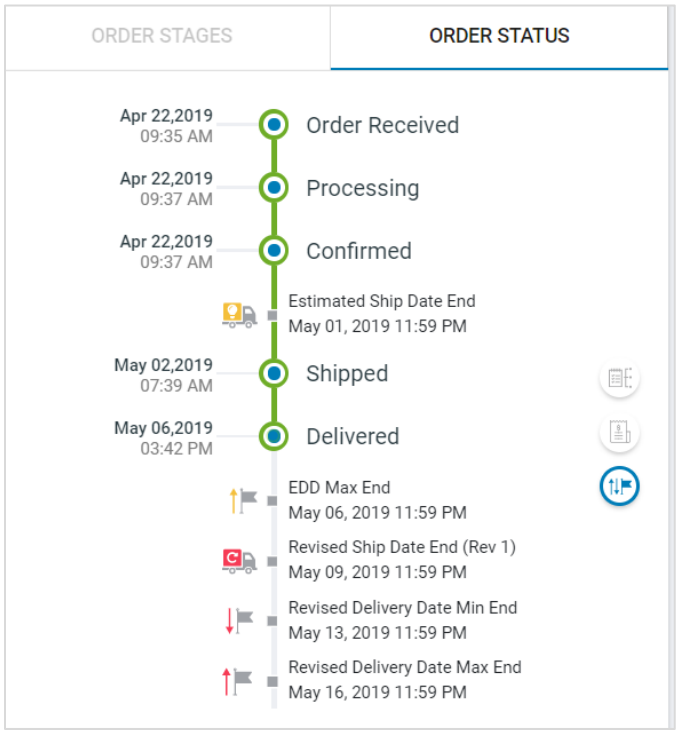
User can view the Shipping and Delivery Status of the order in this section along with SLA days. The shipment and delivery statuses are categorized with four conditions:

a. "Shipped/Delivered" ('X' Days early)
b. “Shipped/Delivered” (On-Time)
c. “Shipped/Delivered” (X Days late)
d. "Shipment/delivery Missed" (X days overdue)
e. “Pending Shipment/delivery" (X Days remaining)

Order Timelines

ORDER STATUS –



There are two timelines – Order stages and Order status. User can see the order status-Customer communicable timeline. This is a very high-level status that is shared with the customer. Below is the list of statues:

a. Order Received – Order Received by Dell
b. Confirmed – Order Confirmed by Dell
c. In production – Production started
d. Build Complete – Build Complete
e. Shipped – Shipment started to customer
f. Delivered – Order Delivered to customer

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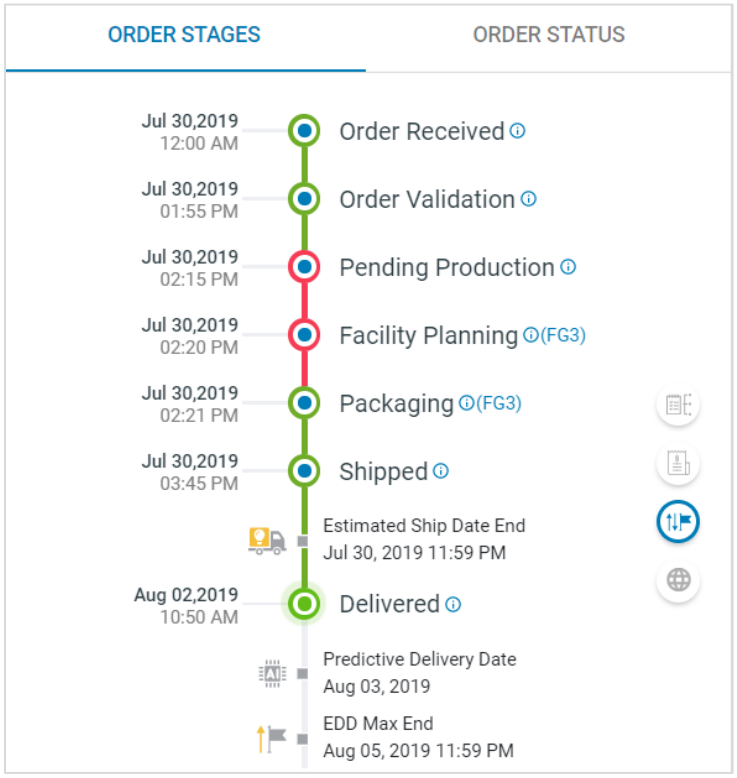
g. Available – Software Order available for download
h. Cancelled – Order is cancelled

ORDER STAGES—



User can view the order stage in the order timeline that depicts the primary milestones defined by business in the Order lifecycle. Below are the stages that is being captured:

a. Order Received – Order received in our sales tools
b. Order Validation – Order validated in order management
c. Pending Production – Order received in Factories and acknowledged
d. Facility Planning – Order received in manufacturing facilities
e. In Production – Production started
f. Shuttle – Order in shuttle (via ship or road) from manufacturing facilities to shipping facilities
g. Consolidation – Order packed and boxed and ready for ship
h. Shipped – Order shipped (to customer's location)
i. Delivered – Order delivered to the customer.

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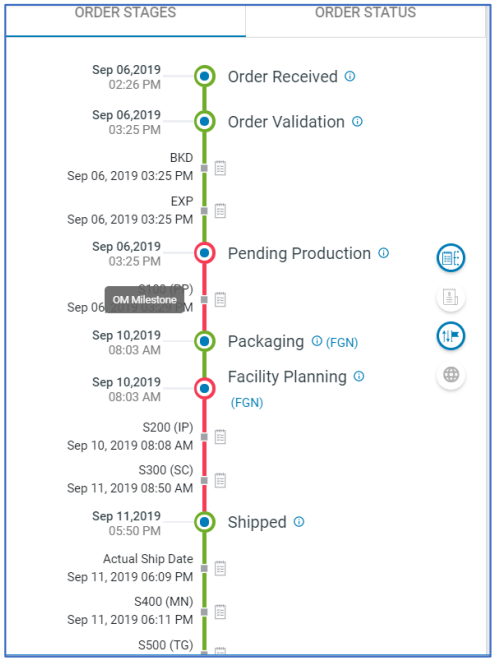
ORDER MANAGEMENT STATUS MILESTONE—



On the order timeline, user can click on the 'order management status milestone' icon to view the business status/events along with the timestamp on the order timeline. This information is received from the OMEGA. Below is the list of Order management statuses:

a. BKD - Order Booked
b. EXP - Export Compliant
c. 100(PP) - Pre-Production
d. 200(IP) - In-Production
e. 300(SC) - Ship Complete
f. 400 (MN) - Manifested
g. 500 (TG) - Service Tag Attached
h. CLD - Closed
i. EXW - Ex Warehouse
j. EXD - Ex Distributor

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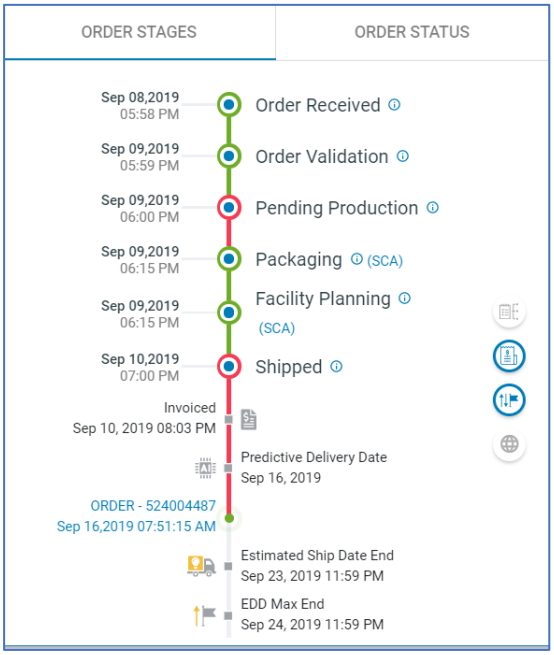
ORDER INVOICED MILESTONE—



On the order timeline, user can click on the 'Order Invoiced milestone' icon to view the order invoiced date with reference to order stages/status history.

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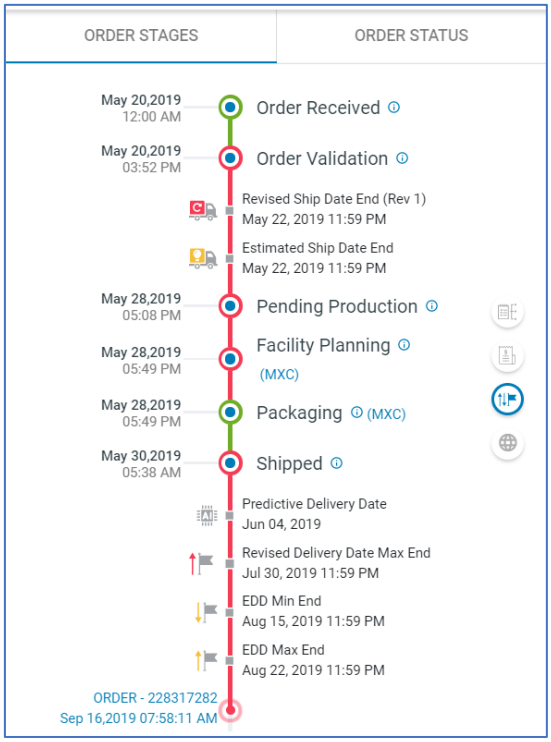
ORDER COMMITMENT MILESTONE—



On the order timeline, user can click on the 'Order commitment milestone' icon to view the order estimated shipment/delivery dates. If the ESD/EDD is missed, the system generated revised ship/delivery dates are listed.

On the commitment we are also listing the predictive date depending on the previous order history and the SLA's

a. ESD – Excepted Ship Date
b. RSD – Revised Ship date with revision count
c. EDD min/max – Excepted delivery date min/max
d. RDD Min/Max – Revised delivery date min/max
e. Actual Ship Date
f. Actual Delivery Date
g. POD – Proof of delivery
h. Predictive Delivery Date

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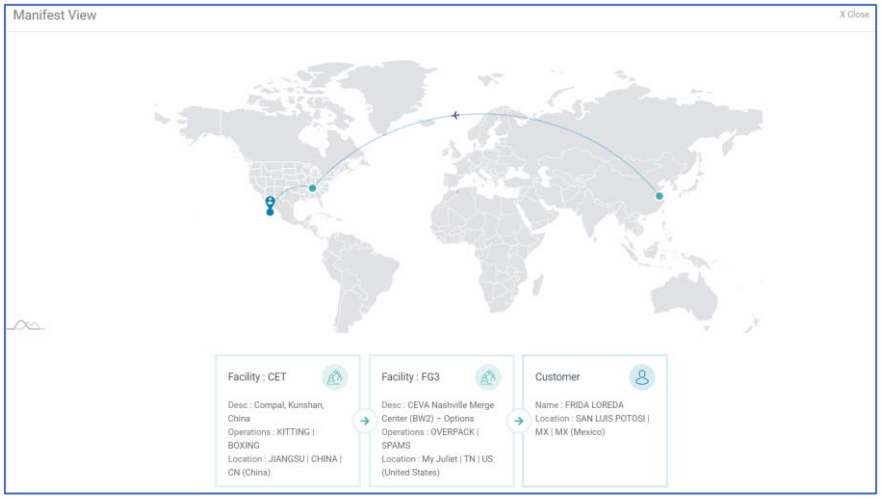
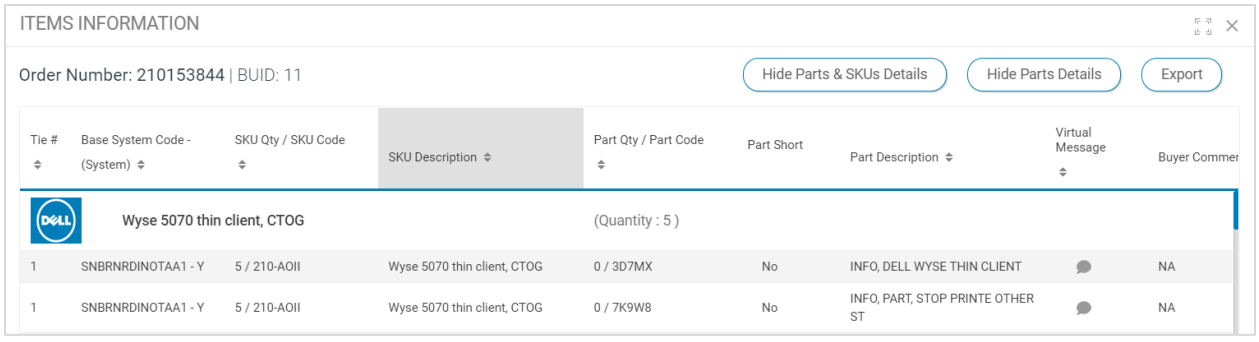
MANIFEST DETAILS—



On the order timeline, user can click on the 'Manifest Details' icon to view the manifest details (kitting facility, boxing facility, SPAMS facility, overpack facility) which includes the customer and facility details.

Order Tiles

ITEM INFORMATION—



On clicking Item Information tile, user can view order quantity of each order items and their SKU part details. The user is given with options to hide/show parts and SKU details. User can also export all the fields in excel file format.
On the Item Information window, system lists items information in the below fields:

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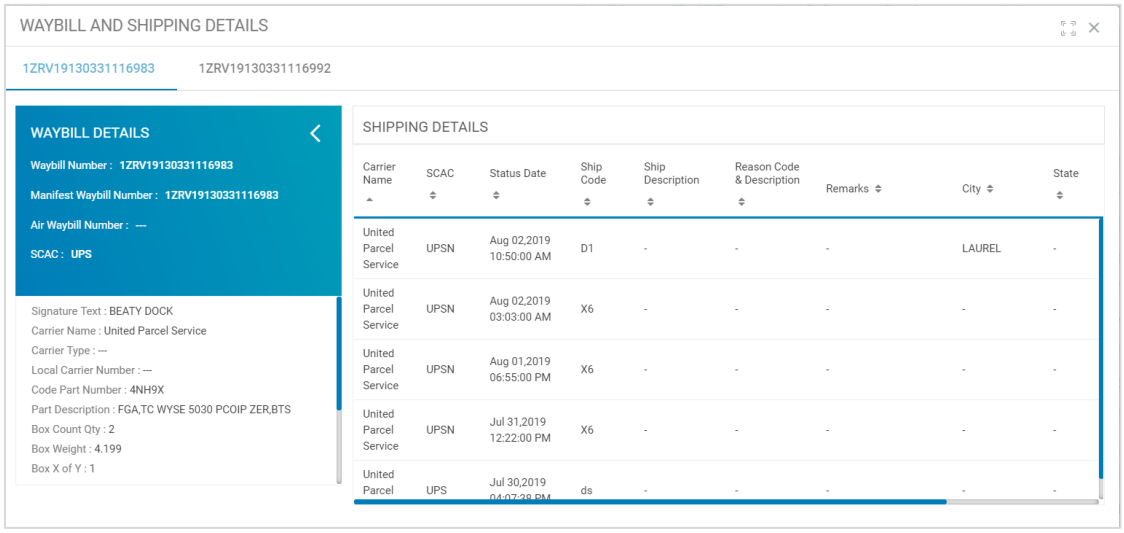
a. Item Name
b. Item Quantity
c. Tie #
d. Base System Code - (System)
e. SKU Quantity
f. SKU Code
g. SKU Description
h. Part Quantity
i. Part Code
j. Part Short: - if the part shortage is yes, then system display vendor name, expected delivery date and expected quantity onclick of yes.
k. Part Description
l. Virtual Message
m. Buyer Comments
n. Backlog Quantity
o. Site

SHIPPING INFORMATION—



To view the waybill details and shipping status, user can click on 'Shipping Information' tile. On 'Waybill and Shipping Details' window, user can view multiple waybill number (if any) which includes waybill and shipping details. Each waybill number is presented as separate tab for drill down to view carrier details, parts descriptions and shipping address.
The Waybill details consists of below information-

a. Way Bill Number
b. Manifest Waybill Number
c. Air Way Bill Number

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d. SCAC (Standard Carrier Alpha Code)
e. Signature Text
f. Carrier Name
g. Carrier Type
h. Local Carrier Number
i. Code Part Number
j. Part Description
k. Box Count Qty
l. Box Weight
m. Box number X of Y
n. Service Tag
o. Box Type
p. City
q. State
r. Postal Code
s. Country

The Shipping information of each waybill number consists of below details-

a. Carrier Name
b. SCAC
c. Status Date
d. Ship Code
e. Ship Description
f. Reason Code & Description
g. Remarks
h. City
i. State
j. Postal Code
k. Country

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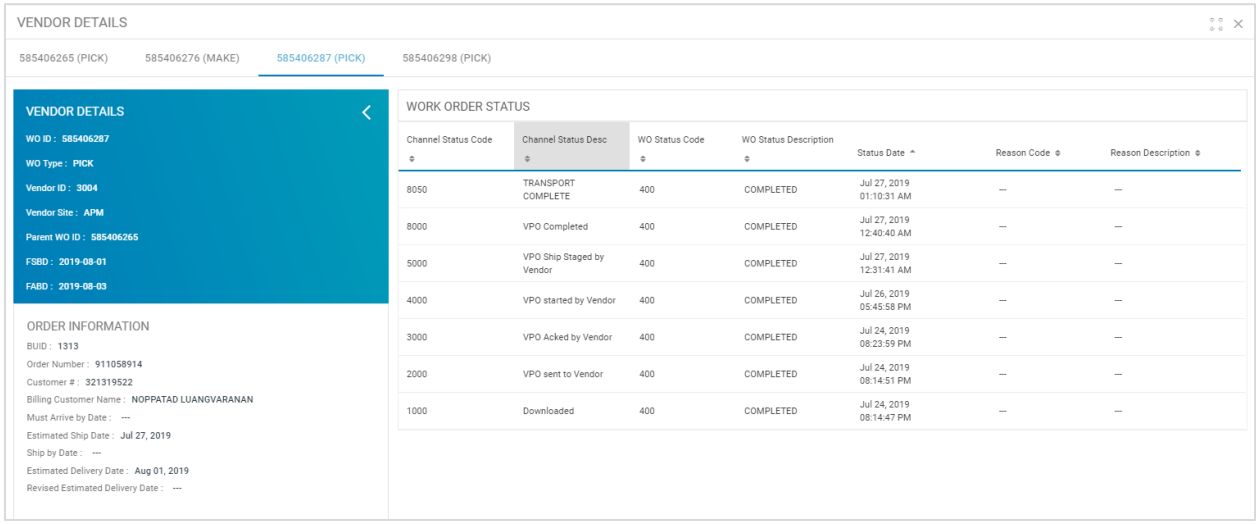
VENDOR DETAILS—



On Clicking on 'Vendor Details' tile, user can view Vendor details, order information and the work order status. Each Make, and Pick Vendor work order ID's are available on separate tabs as headers.

Vendor details available for each work order is listed below;

a. WO (Work Order) ID
b. WO (Work Order) Type: (Make/Pick Order)
c. Vendor ID
d. Vendor Site
e. Parent WO ID
f. FSBD (Facility Ship by Date)
g. FABD (Facility Arrival by Date)

FSBD and FABD dates are forward calculated based on Order Download Date i.e. the date GRP (Global Route Plan) service is called from Order Routing System.

Below listed work order status are available for each work order;

a. Channel Status Code
b. Channel Status Description
c. WO Status Code
d. WO Status Description
e. Status Date
f. Reason Code
g. Reason Description

On each of the Make/Pick order tab, order information is also listed beneath the vendor details;

a. BUID
b. Order Number
c. Customer number
d. Billing Customer name

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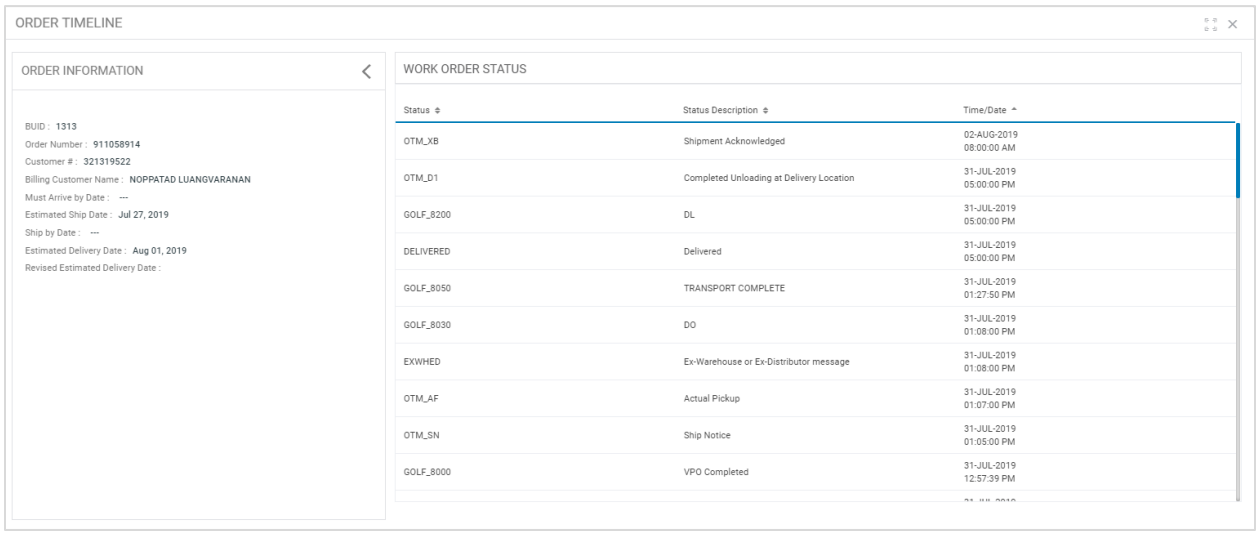
e. Must Arrive Date
f. Estimated Ship Date
g. Ship by Date
h. Estimated Delivery Date
i. Revised Estimated Delivery Date

ORDER TIMELINE—



To view the order milestone user can click on the 'Order Timeline' tab. On Order Timeline window user can view all milestone status and description that is received by various systems (DOMS, BOSS, GOLF etc.) along with timestamp. Typically order milestones consists of-

a. Order management status
b. Production order status
c. Work order status
d. Logistics status
e. Communication status

ORDER LIFECYCLE—

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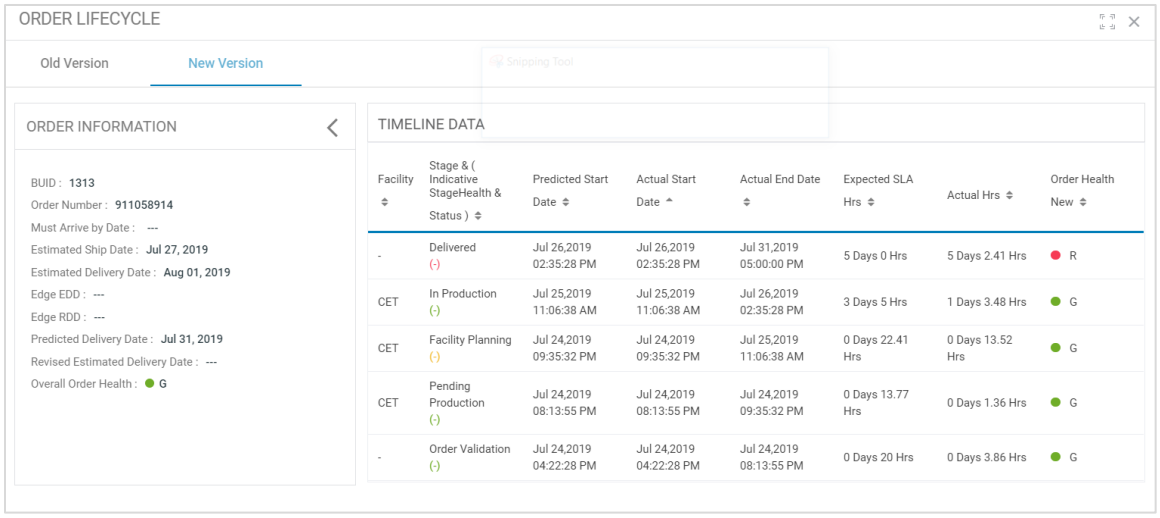

User can click on 'Order Lifecycle' to view the order information, defined SLA's, order health and timeline.

As part of the Timeline data, user can view;

a. Facility Name
b. Stage & (indicative stage health & status): Business defined stage with their status and health.
c. Actual Start Date: The actual start date is a timestamp when the individual stage has started.
d. Actual End Date: The actual end date is a timestamp when the individual stage has ended.
e. Expected SLA
f. Actual Hours
g. Average SLA
h. Predicted Start date: Predicted Start Date is the most likely date for the individual order stage to start.
i. Order Health: This indicates, how is an order doing with respect to the estimated delivery date (EDD) communicated to customer at the time when order was placed.
    1. A red health indicates that an order is likely to miss EDD
    2. A Yellow health indicates that an order is quickly approaching EDD but may not miss EDD
    3. A green health indicates that an order is likely to reach the customer on or before the EDD

Note: The Predicted date and order health is displayed only on the 'New Version' tab

CUSTOMER INFORMATION—

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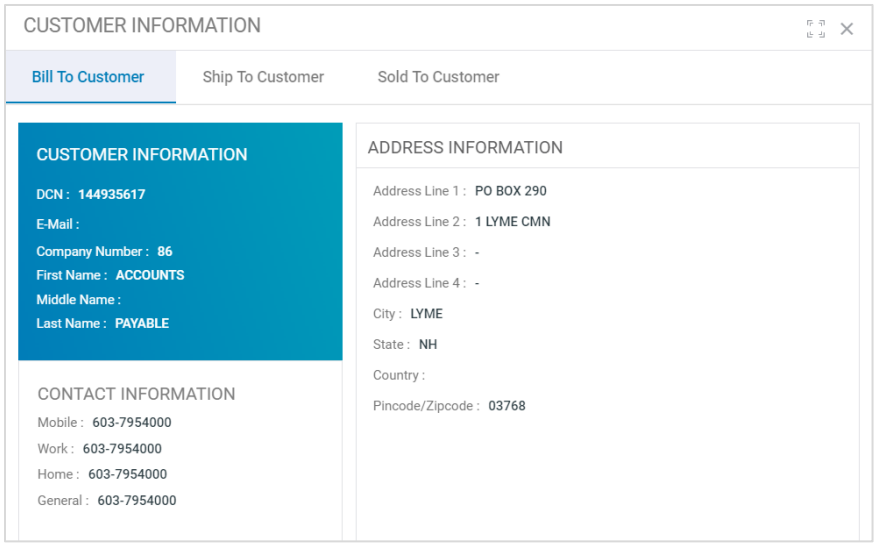
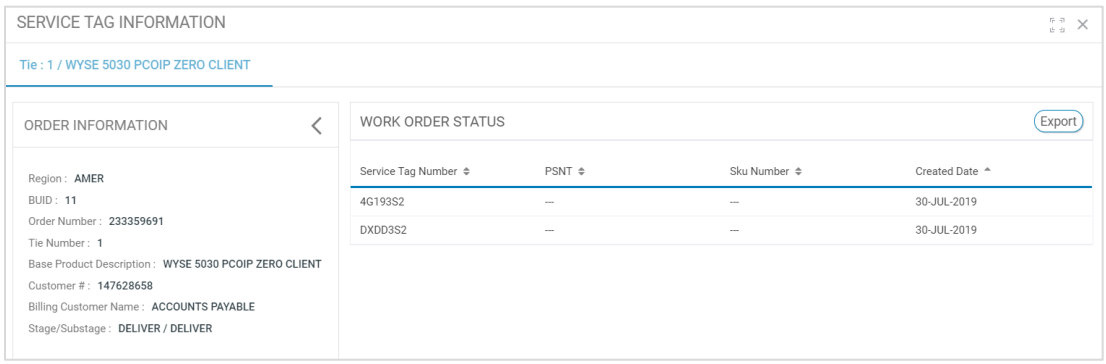


To view customer details, click on the 'Customer Information' tile. On the customer information window, user can view customer contact and address details of 'Bill To Customer, Ship To Customer, Sold To Customer'. On each of the customer details tab below listed information is available:

a. Company Name
b. First Name
c. Middle Name
d. Last Name
e. Address Line1, Line 2, Line3, Line4
f. City
g. State
h. Country
i. Pin code/Zip code
j. Customer Email
k. Customer Contact- Mobile, Work, Home, General

SERVICE TAG—



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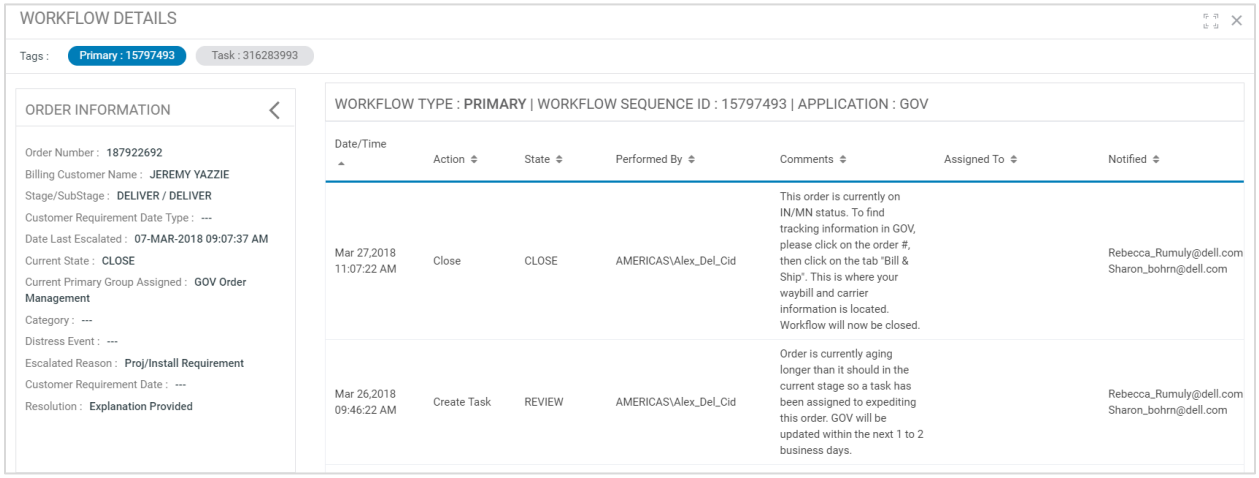
Service tags associated with each order Tie can be viewed by clicking on the 'Service Tag' tile. Order Tie is a unique BOM configuration within a specific order. On Service Tag Information window user can view the order information, tie number, base product description and order stage. For each tie following details are listed;

a. 1.Service Tag number
b. 2.PSNT
4. SKU number
5. Created Date

User can also export the service tag information in an excel format.

WORKFLOW DETAILS—



User can view the workflow details by clicking on the 'Workflow Details' tab. On the workflow details window, order's workflow details with latest workflow & escalated comments, last action date, assigned to group, workflow status can be viewed.

An order can consist of Primary workflow and multiple tasks. These workflows are displayed as tags. For example: Primary, Task1, Task2, Task3 etc. Clicking on any of one of the tags- workflow details can be viewed;

a. Workflow Type→ Primary and Task
b. Workflow Sequence Id: ID is generated for individual workflow type.
c. Application: The name of the application where the workflow is created (CDT vs GOV).
d. Date/Time
e. Action: List of action types for a workflow
    1. Close
    2. Comment
    3. Reject

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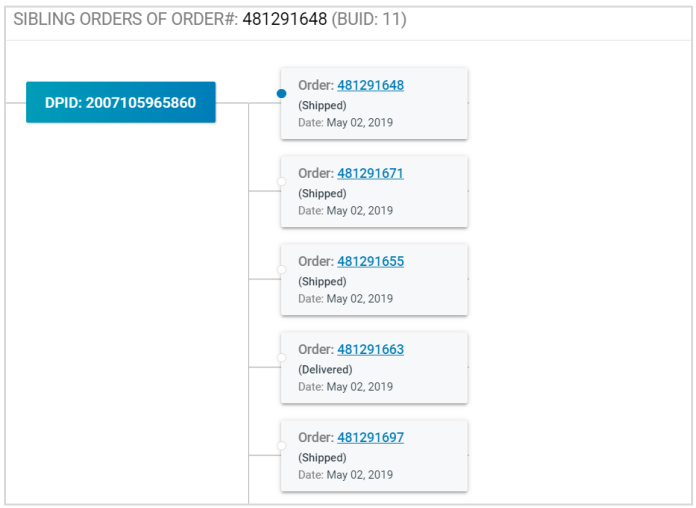
4. Cancel Workflow
5. Escalate Override
6. Inquire
7. Manager Approval
8. Message
9. Approve
10. Assign
11. Escalate
12. Create Task
13. Review

f. State: Current Workflow state (Open, Close, Review)
g. Performed By: User who performed the action on the workflow
h. Comments: Comments added by the user during workflow
i. Assigned To: GOV Order Management, GOV Regional Ops Cell, Smart Selection Control Room, VXRSNET are the teams where any workflow is worked upon
j. Notified: Email-ID for workflow notification

ORDER SIBLINGS—



User can view sibling orders associated with the current order DPID/IRN by clicking on the 'Order Siblings' tile. The DPID/IRN number is listed with all associated order numbers sorted according to their order creation date. Each sibling order's- order status and their creation date are listed as a tile. User can click on the sibling order to navigate and view the order details.

RELATED ORDERS—

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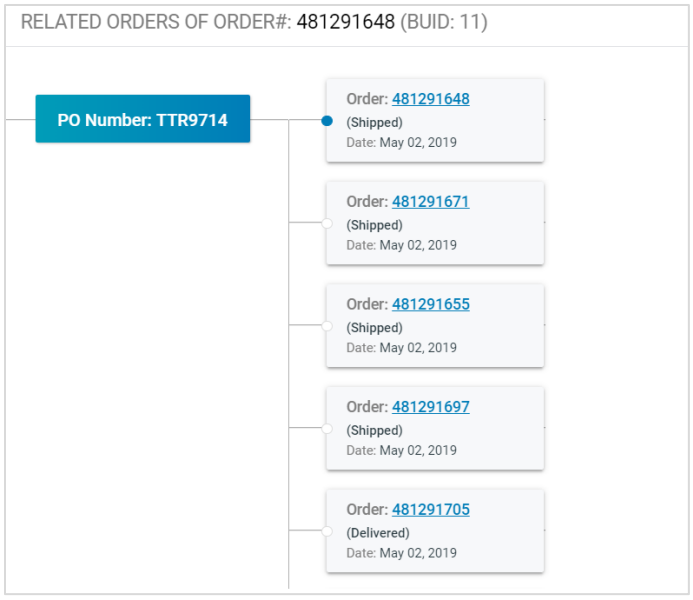
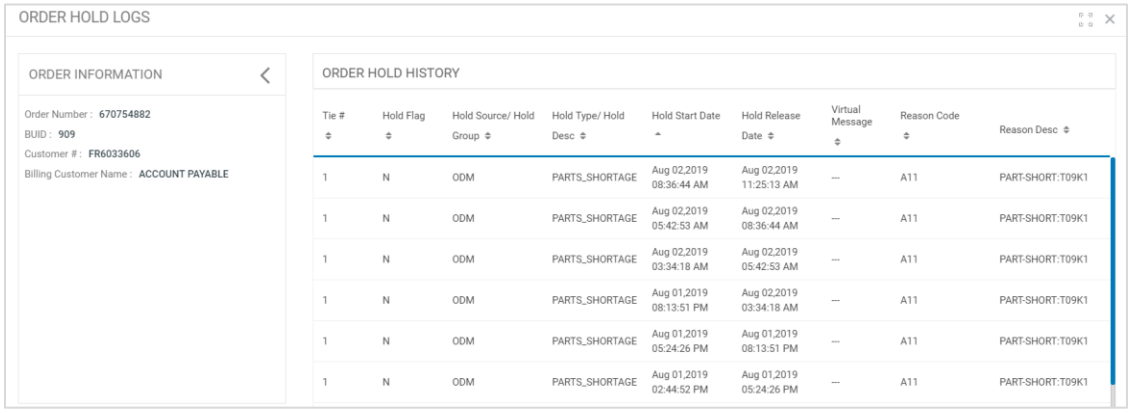


User can view the orders associated with PO number on clicking on the 'Related Orders' tile. On Related orders window, order numbers associated with the PO number are listed. Each related order's- order status and their creation date are listed as a tile. User can click on the order number to navigate and view the order details.

ORDER HOLDS—



Order hold history can be viewed on clicking the 'Order Hold' tile. All ties are displayed as different tabs if any hold exist for that tie. The Title of the tab is "Tie# - Base Prod Desc". The order hold history is displayed in the listed fields;

a. Hold Flag
b. Hold Source
c. Hold Group
d. Hold Type

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e. Hold Description
f. Virtual Message
g. Reason Code, Reason Description
h. Hold Start Date
i. Hold Release Date

TASK HOLD DETAILS—

If the order has a task/hold then the user can click on 'Task Hold Details' tile to view the details. This tile is enabled only when the task/ hold exists on the order. The task and hold details are listed in the fields;

Hold Details-

a. Hold Code
b. Hold Description
c. Hold Status
d. Start Date
e. Completed Date
f. Hold Duration

Task Details-

a. Task Code
b. Task Description
c. Task Status
d. Start Date
e. Completed Date
f. Task Duration

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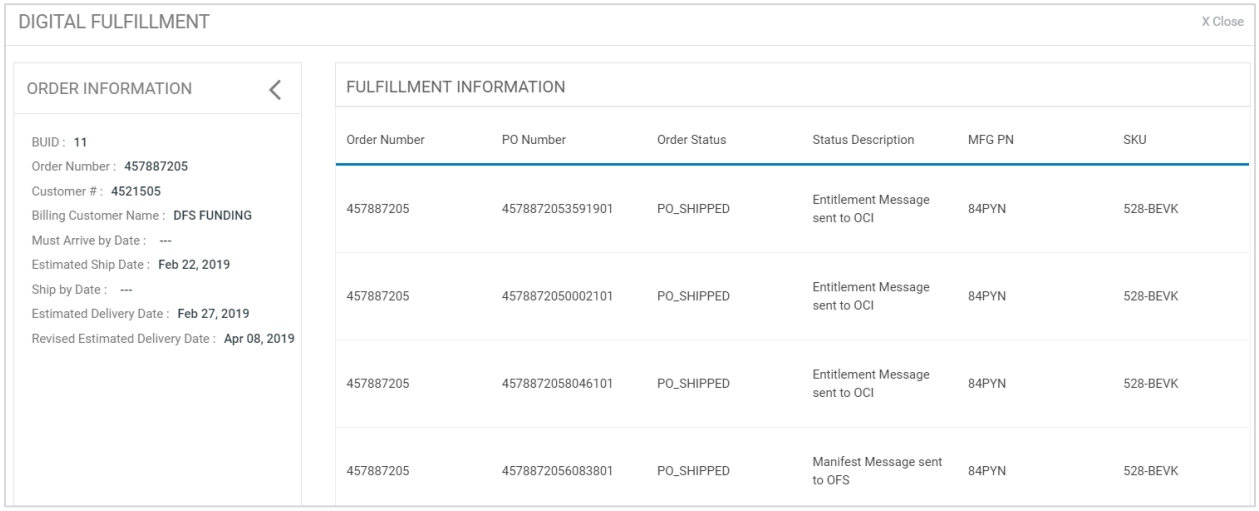
DIGITAL FULFILLMENT—



Digitally fulfilled information can be viewed by clicking on the 'Digital Fulfillment' tile. This tile is enabled only when the order or part of the order is digitally fulfilled. The PO and digital fulfillment details are listed in the fields on the 'Digital Fulfillment' window:

a. PO Number
b. Status
c. Status Description
d. SKU Quantity
e. SKU
f. SKU Description
g. MFG PN (Manufacturing part number)
h. Entitlement ID: Unique identifier for each of the assets sold to customer
i. Entitlement create date
j. Recurring Billing Status
k. Renewal date

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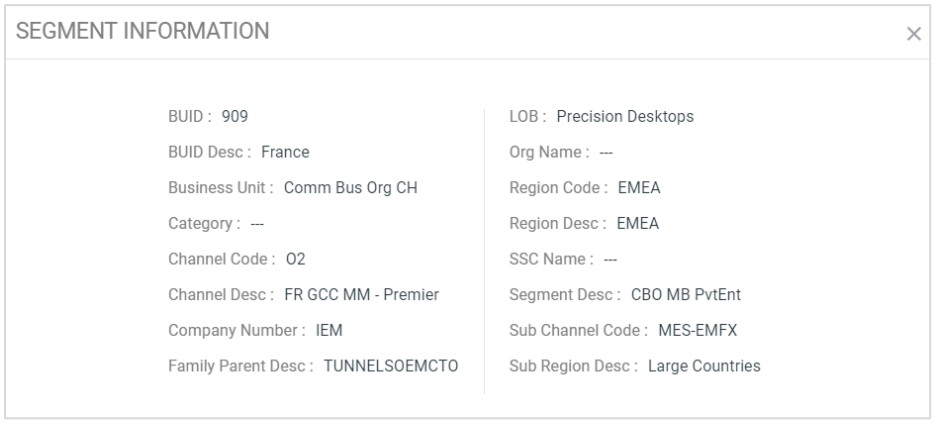
SEGMENT INFORMATION—



The segment Information of the order can be viewed by clicking on the 'Segment Information' tile. The segment information details are listed in the fields:

1. BUID	9. LOB
2. BUID Description	10. Org Name
3. Business Unit	11. Region Code
4. Category	12. Region Description
5. Channel Code- OFS, FOOE, O2, LOGISTICS	13. SSC (Segment supply Chain) Name
6. Channel Description	14. Segment Description
7. Company Name	15. Sub Channel code
8. Family Parent Description	16. Sub Region Description

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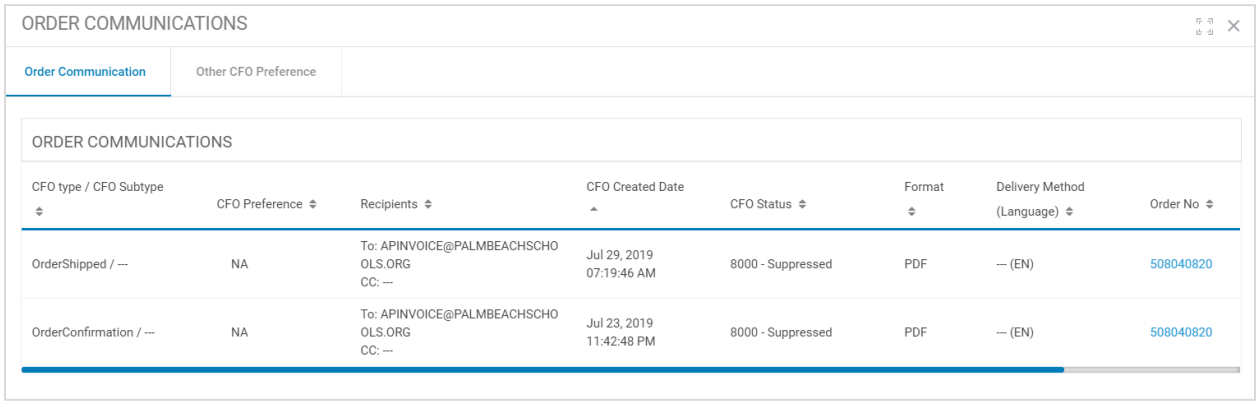
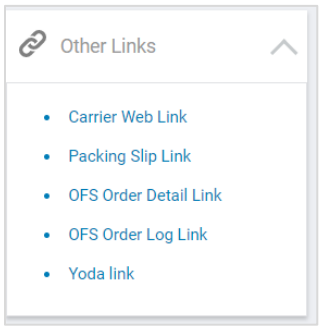
ORDER COMMUNICATION—



Communications sent to the customer can be viewed on the 'Order communication' tile. On the Order communication window, all the order/DPID level communications that have been sent for the customer can be viewed and downloaded. The communication made for the customer at different order stages/status are displayed;

a. CFO (Customer Facing Output) Type: Type of notification sent to the customer based on defined business events.
b. CFO Sub-Type
c. CFO Created Date
d. CFO Status: success, failed, suppressed, bounce back
e. CFO Language: Regional language preferred by user.
f. CFO Format: HTML, PDF, Excel, XML)
g. Delivery Method: Email, SMS, Print, Fax etc.
h. List of order numbers included in the CFO

OTHER LINKS—



User can click and navigate to different sites to view the order details, carrier details, third part vendor details etc.

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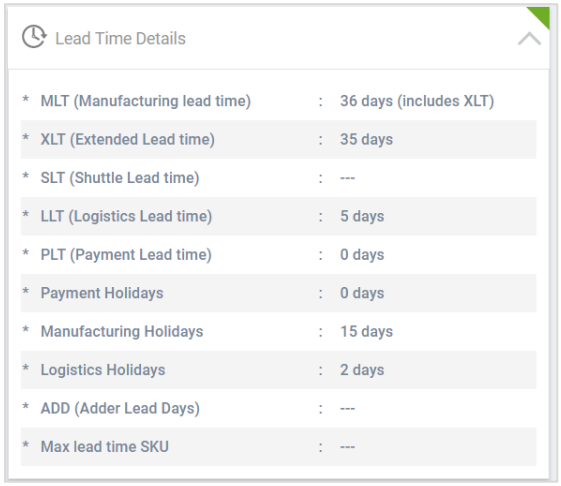
LEAD TIME DETAILS—



User can view the lead times defined for each of the order stage at the time of the order placement.

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