Unit 2: Order-related Configuration

This unit focuses on Sales Order-related concepts such as Sales Order creation, processing Sales Orders, creating order holds and order monitors, and configuring order fulfillment rules. It also provides an overview of the sourcing and scheduling rules that are required to fulfill a Sales Order.

LESSON 2.1: Sales Order Specific Configuration

Introduction

This lesson will provide you with an overview of Sales Order specific configuration.

Lesson Objectives

This lesson is designed to enable you to:

- Search and view the part of a Sales Order.
- Describe basic Sales Order specific rules.
- Configure order modification rules.
- Create order holds.
- Create order monitors.

References

For more information on Sales Order specific configuration, refer to:

- http://www.ibm.com/support/knowledgecenter/SS6PEW_9.5.0/com.ibm.help.dom.concepts.doc/productconcepts/c_OrderManagement.html

Navigate to **Sterling Order Management** > **Sterling Order Management 9.5.0** > **Configuring supplied and add-on solutions** > **Sterling Distributed Order Management > Considerations** > **Order management**

Sales Order Overview

Overview

A Sales Order is a document that is used to sell items or services, either from business-to-business or business-to-customer.

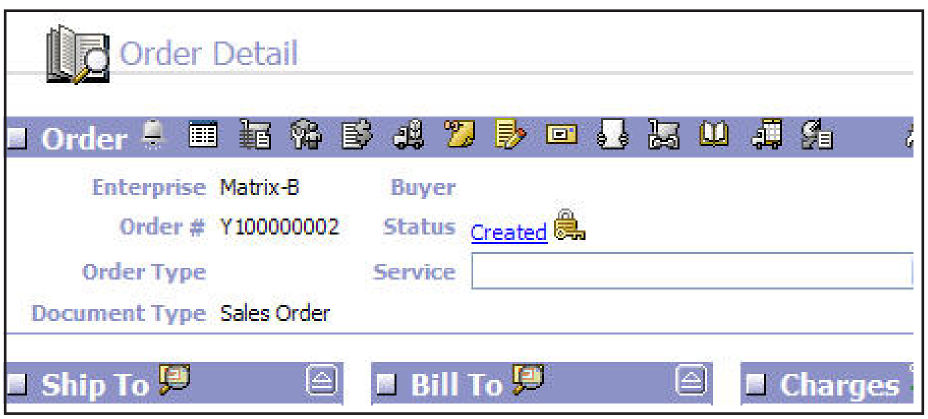
Order Console

The order console provides access to order information. Customer service representatives (CSRs) and CSR managers can view order information in real time to handle alerts and correct problems, ensuring on-time execution of orders. More specifically, the order console enables you to view order details, order alerts, order releases, order invoice details, order shipments, order instructions, and notes.

Some common order administration tasks that you can perform using an order console are listed:

- Check the status of an order/shipment
- Modify or cancel an order
- Perform product/price/availability checks
- Handle alerts
- Ensure on-time execution of orders

The following figure shows a part of the Order Detail screen from the order console.



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Sales Order Overview

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Order Search

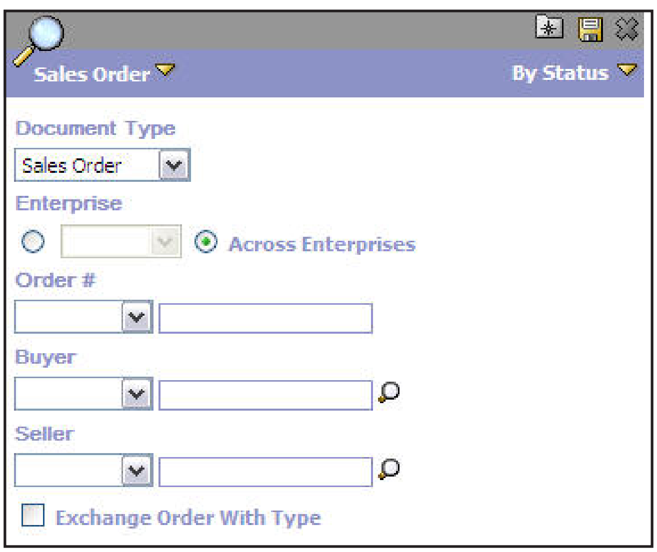
An order search uses a search panel. A search panel provides you with a means to locate a specific entity. You can either perform a broader search or refine the search criteria to return a narrowed set of results. For example, you can search for all order lines that contain a particular item. Listed are some of the key aspects of an order search:

- Depending on the console you are in, you can select different entities and search views from the entity and search view menu lists.
- Some search criteria fields allow you to select from a menu list of available criteria while others require you to enter a criteria.
- If there is a particular search that you do frequently, you can give the search a name and save it as a favorite search. This favorite search can then be accessed from both the home page and the applicable search window.

You can perform an Order Search:

- **By Status** - Search for Orders that have a particular status.
- **By Item** - Search for Orders based on an item information such as product class, unit of measure, item ID.
- **By Date** - Search for orders that fall within a particular date range for shipments and delivery.
- **By Address** - Search for orders that belong to a billing or a shipping address.
- **Draft Orders** - Search for Draft Orders with the help of this screen. Draft Orders are orders in process and that are not confirmed.

The following figure displays a part of the Order Search panel.



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Sales Order Overview

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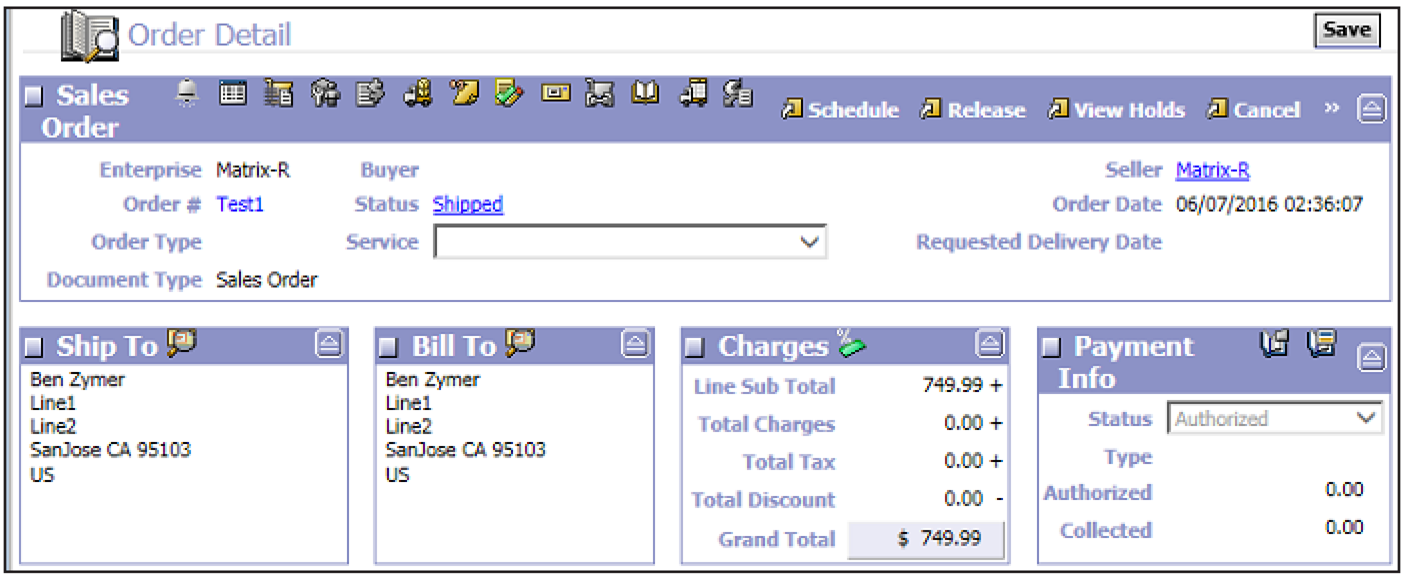
Order Levels

In Sterling Selling and Fulfillment Foundation, an order can be broken down into order header, order line, and order release level.

Order Header

The order header level contains all of the order lines in an order. The order header information pertains to attributes such as billing address and payment information. It also pertains to additional attributes, such as order identification, order creation, shipping, and financial information. The following figure displays a part of the Order Detail screen.



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Sales Order Overview

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Order Levels

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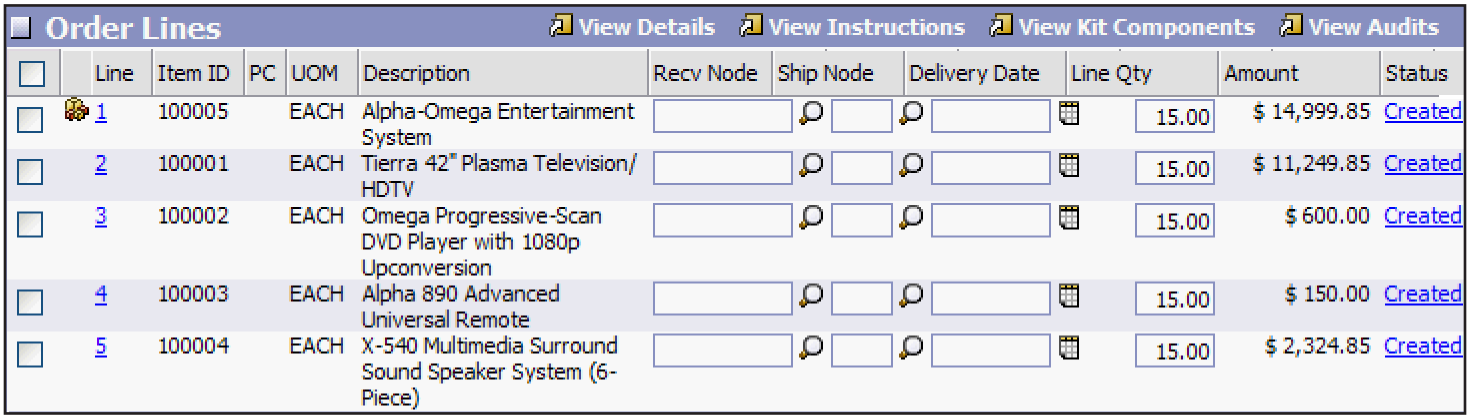
Order Line

The order lines contain information about each individual order line. The following figure shows the Order Lines panel.



Order Lines — View Details | View Instructions | View Kit Components | View Audits

Line	Item ID	PC	UOM	Description	Recv Node	Ship Node	Delivery Date	Line Qty	Amount	Status
1	100005		EACH	Alpha-Omega Entertainment System				15.00	$ 14,999.85	Created
2	100001		EACH	Tierra 42" Plasma Television/ HDTV				15.00	$ 11,249.85	Created
3	100002		EACH	Omega Progressive-Scan DVD Player with 1080p Upconversion				15.00	$ 600.00	Created
4	100003		EACH	Alpha 890 Advanced Universal Remote				15.00	$ 150.00	Created
5	100004		EACH	X-540 Multimedia Surround Sound Speaker System (6-Piece)				15.00	$ 2,324.85	Created

Order Release

The order release level contains all of the lines that are released to a ship node.

Exercise 2.1.1: View Parts of an Order

Scenario

Matrix recently hired a CSR. You are required to demonstrate to the CSR the process of locating an order and viewing the order details. In this exercise, you will demonstrate how to search and view details for all Matrix Sales Orders.

Instructions

Procedure to View the Parts of an Order

1. Launch the **Application Console**.
2. Go to **Order** > **Order Console**. The Order Search panel displays.
3. Enter the Seller as **Matrix-R**.
4. Click **Search**. The Order List displays a single Sales Order that matches the search criteria.
5. The **Order Detail** screen for the order is displayed when you click Search. If only a single order matches the search criteria, then the order details are displayed. If more than one order satisfies the search criteria, then the orders are listed sequentially.
6. The Order Details consist of the following panels:
   - Sales Order
   - Ship To
   - Bill To
   - Charges
   - Payment Info

   The order lines panel consists of the different order lines.

Result

In the order details screen for the order, the status displays as shipped and the seller displays as Matrix-R.

Basic Sales Order-Specific Rules

Introduction

Order specific rules and attributes pertain only to the order document type you are configuring, such as Sales Order or Transfer Order. You can define different configurations for individual Order Document Types without impacting other applications or Order Document Types.

You can configure the following Order-Specific Rules:

- Order Attributes
- Order Validation
- Instruction Types
- Modification Reasons
- BackOrder Reasons
- Note Reasons
- Line Relationship Type
- Purge Criteria

Order Attributes

You can define common codes as they pertain to Order Documents viewed in the Application Consoles.

You can use the Order Attributes option for the following tasks:

- Defining Order Types.
- Defining Order Sources.
- Defining External References for the Order Level.
- Defining External References for the Order Line Level.
- Defining Order Address Types.
- Defining Line Types.
- Defining Other Attributes.

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Basic Sales Order-Specific Rules

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Order Attributes

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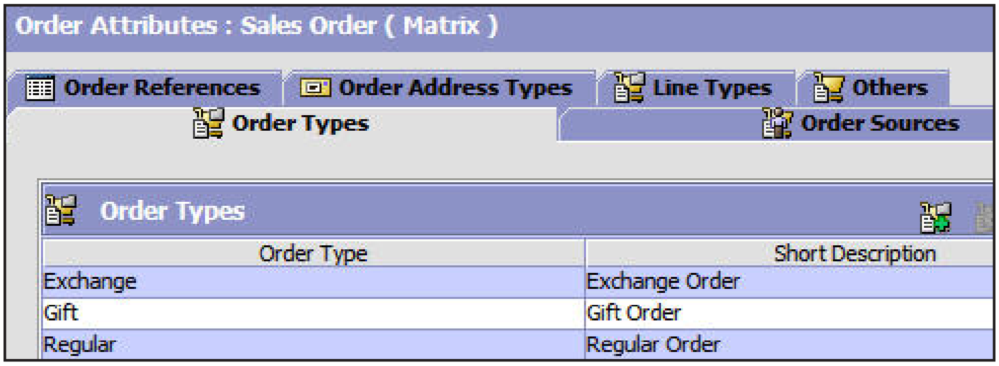
The following figure displays the tabs in an Order Attributes screen.



Order Validation

You can define the configuration for validating the Sellers and Buyers of an Order during Order Creation for a particular Enterprise and Document Type. This validation is used to determine the Sellers and Buyers that an Order can be created for. Order validation reduces the search results in the Application Consoles based on the Validation Type you configured.

For example, if an Enterprise has access to Seller A and Buyer B, and if you set both the Seller and Buyer Validations to ‘Defined In The Enterprise Hierarchy’, then when a user creates an Order, the system verifies that the Seller on the Order is Seller A and the Buyer on the Order is Buyer B.

To configure Order Validation, you must start Applications Manager and go to **Applications** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Order Validation**.

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Basic Sales Order-Specific Rules

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Order Validation

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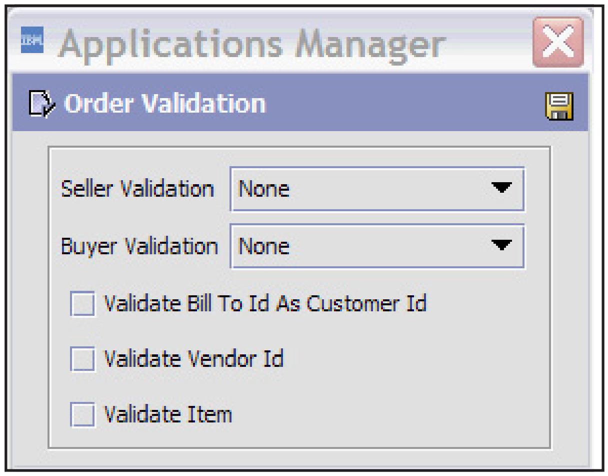
The figure displays an **Order Validation** window.



The fields in an **Order Validation** window are explained:

- **Seller Validation** enables you to select the type of validation you want to use to verify the seller on the Order document. The different options are:
  - **None -** No validation is performed for sellers on an Order. All sellers in the system can be used during order creation.
  - **Same As Enterprise -** The system validates that the seller is the Enterprise.
  - **Defined In The Enterprise Hierarchy -** The system validates that the seller is defined within the Enterprise organizational hierarchy.
  - **Vendor of Enterprise -** The system validates that the seller is configured as a vendor.
- **Buyer Validation** enables you to select the type of validation you want to use to verify the buyer on the Order document. The different options are:
  - **None -** No validation is performed for buyer on an Order. All buyers in the system can be used during order creation.

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Basic Sales Order-Specific Rules

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Order Validation

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  - **Same As Enterprise -** The system validates that the buyer on the Order is the Enterprise.
  - **Defined In The Enterprise Hierarchy -** The system validates that the buyer on the Order is defined within the Enterprise organizational hierarchy.
  - **Customer Of The Enterprise -** The system validates that the buyer on the Order is configured as a Customer.
- Select **Validate Bill To Id As Customer Id** if you want to validate that the customer ID on an Order is defined for the Enterprise.
- Select **Validate Vendor Id** if you want to validate that the Vendor ID on an Order is defined for the Enterprise.
- Select **Validate Item** if you want to validate that the Product Items on the Order belong to the Enterprise Catalog.

Instruction Types

You can define the common codes used when adding Special Instructions to an Order Document. The default Instruction Types in Sterling Selling and Fulfillment Foundation are:

■ AVAILABILITY ■ PICK ■ PACK ■ SHIP	■ GIFT ■ ORDERING ■ OTHER

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Basic Sales Order-Specific Rules

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Instruction Types

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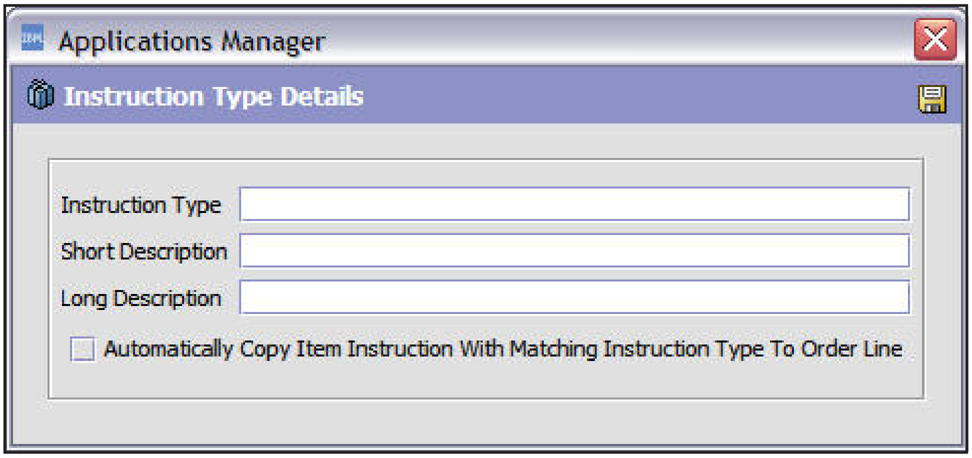
To configure Instruction Types, you must start Applications Manager and go to **Applications** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Instruction Types**.

The following figure displays an Instruction Type Details window.



You must enter a name for the new Instruction Type and a short and long description.

Automatically Copy Item Instruction With Matching Instruction Type To Order Line field forces the system to automatically copy item instructions with matching Instruction Types to Order Lines when the items are added onto an Order.

Modification Reasons

You can define common codes for Modification Reasons. These codes define why a modification was made by a user in the Application Consoles. In addition to Modification Reasons, the codes that you define are used as Hold reasons when you put an Order on Hold in the Application Consoles.

To configure Modification Reasons, you must start Applications Manager and go to **Applications** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Modification Reasons**.

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Basic Sales Order-Specific Rules

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Modification Reasons

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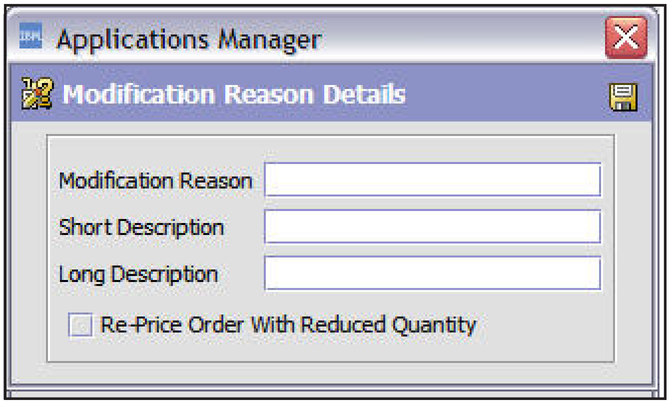
The following figure displays the **Modification Reason Details** window.



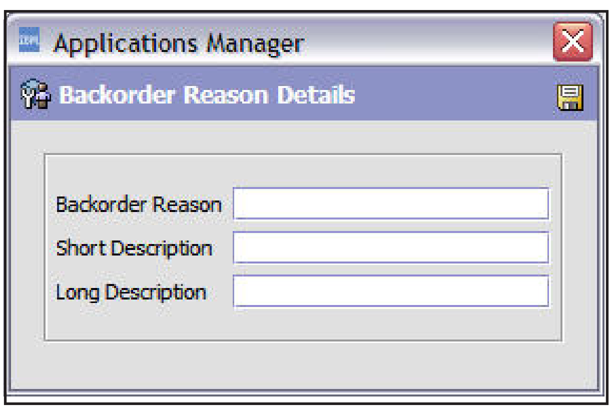
You must enter a name for the new Modification Reason and a short and long description.

The **Reprice Order With Reduced Quantity** field specifies that the Modification Reason requires the Order repriced due to reduced quantity.

BackOrder Reasons

You can define common codes for BackOrder Reasons. These codes describe why an Order was backordered. The default BackOrder Reason in Sterling Selling and Fulfillment Foundation is No Stock.

To configure BackOrder Reasons, you must start Applications Manager and go to **Applications** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **BackOrder Reasons**. The figure displays a **BackOrder Reason Details** window.



You must enter a name for the new Backorder Reason and a short and long description.

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Basic Sales Order-Specific Rules

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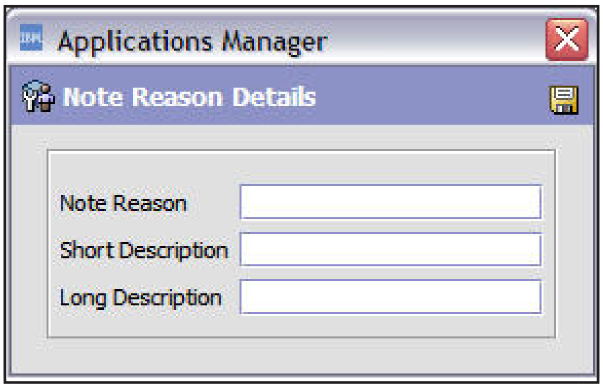
Note Reasons

You can define reason codes for entering a Note. These codes define why a Note was entered by a User in the Console.

To configure Note Reasons, you must start Applications Manager and go to **Applications** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Note Reasons**. The following figure displays a **Note Reason Details** window.



You must enter a name for the new Note Reason and a short and long description.

Line Relationship Type

You can define the Relationship Types when linking two related Order Lines together. These relationships are used to group similar products together on an Order.

To configure Line Relationship Type, you must start Applications Manager and go to **Applications** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Line Relationship Type**. The figure displays a **Line Relationship Type Details** window.

You must enter a name for the new Relationship Type and a short and long description. Select **Consider For Sorting** to enable sorting on this Relationship Type.

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Basic Sales Order-Specific Rules

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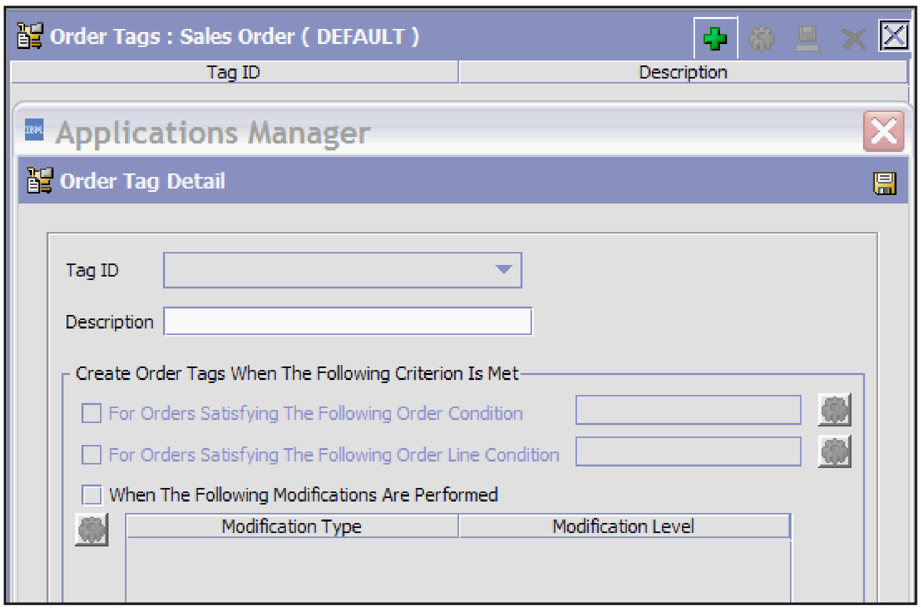
Order Tags

Order Tags enable the system to coordinate which Order features are available across multiple versions of PCAs when they are installed on Sterling Selling and Fulfillment Foundation. For example, it is possible to schedule an Order in one version of the IBM® Sterling Call Center and IBM® Sterling Store, and schedule delivery of the same Order in another version.

To configure Order Tags, you must start Applications Manager and go to **Applications** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Fulfillment** > **Order Tags**.

The following figure displays an **Order Tag Detail** window.



Note

Only a Hub user can create Order Tags. Hence, you can only create Order Tags if you are logged in as admin.

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Basic Sales Order-Specific Rules

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Order Tags

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The main fields in the Order Tag Details window are explained:

- You must select a **Tag ID** from the menu list. (This tag is defined in the Applications Manager Application Platform > Qualified Tag Information.)
- If you select **For Orders Satisfying The Following Order Condition**, click  to open the Condition Detail pop-up window and define the Condition ID, Name, Group, and Value under which the tag is applied to an Order that satisfies these conditions.
- If you select **For Orders Satisfying The Following Order Line Condition**, click  to open the Condition Detail pop-up window and define the Condition ID, Name, Group, and Value under which the tag is applied to an Order when an Order Line satisfies these conditions.
- If you select **When The Following Modifications Are Performed**, click  to open the Modification Type List pop-up window and enable available Modification Types that define when this condition is applied to an Order.

Order Modifications

Overview

Most documents flow through a Pipeline without requiring any intervention by a customer service representative. However, there are times when modifications are required, such as changing credit card information or item quantity. It is necessary to decide the modifications allowed for each Modification Type, Modification Level, and Status Combination. Order modification requests include:

- Order Cancellation
- Quantity/Product Changes
- Payment Changes
- Inventory Shortage
- Address Changes
- Date Changes
- Capturing Special Requests

Order Modification Rules

You can configure rules which determine what parts of an Order Document can be modified and when in the Order lifecycle the modifications can be performed. Modification Rules are defined for a Document Type within a Process Type. You should determine which modifications are allowed for each Modification Type, Modification Level, and Status Combination.

Modification Type

Modification type indicates that the type of modification carried out on the Order Document Type. An example of a Modification Type is adding an Order Line to an Order.

Modification Level

Modification Level indicates the level at which a particular Modification Type is carried out. The different levels include:

- Header and Line
- Release
- Release Line
- Negotiation
- Negotiation Line
- Shipment and Receipt

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Order Modifications

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Order Modification Rules

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Modification Status

Modifications are applied to a particular level and a particular processing Status. For example, if modifications are requested for an Order Document Type at the Header Level or at the Line Level, then the Order Lines, and the Order Release lines, are picked up for validating whether modifications are allowed for those Order Statuses. If modifications are requested at the Release or Release Line Level, then Order Release lines are picked up for validating whether modifications are allowed for those Order Statuses.

Example

You can specify that the **quantity can be changed** (Modification Type) for an **Order Line** (Modification Level) only until the Order is **Released** (Document Status).

Procedure to Configure Modification Rules

Modification Rules can be defined at the Hub or the Enterprise Level.

1. Open **Applications Manager** and go to **Application** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Fulfillment** > **Order Modification** > **Order Modification Groups**.
2. The **Status Modification Group List: Sales Order (Default)** is seen. Right click **Default_Group** to view the details.
3. Select **Modification Type** from the Group By menu list.
4. Double-click **Cancel** and expand **Order**. The Sales Order Document statuses displays.

Note

You will find that Statuses have either green tick marks, red crosses, or grayed out circles next to them. This corresponds to whether modification is Allowed, Disallowed, or Ignored for the Statuses.

5. Right-click any status listed. Two statuses, **Allow Modification** and **Disallow Modification** are displayed.
6. Depending on the business requirement, click **Disallow Modification** or **Allow Modification** to process Order Modification.
7. Close the **Modification Rules** window in the work area.

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Order Modifications

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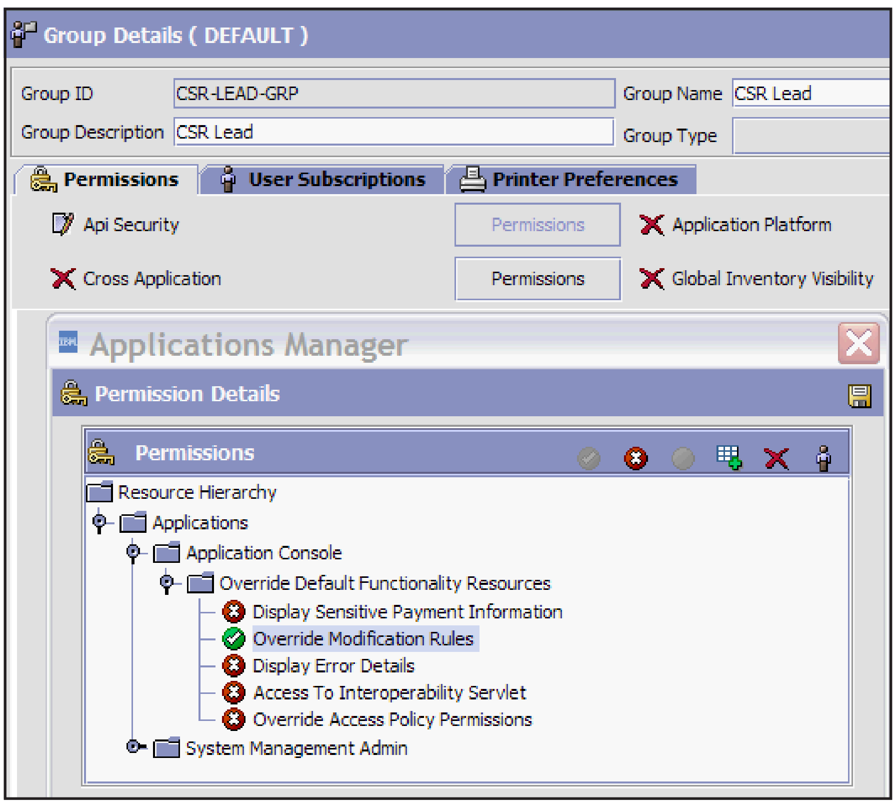
Modification Rules Override

A User Group can perform modifications which are disallowed by Modification Rules. The 'System' User Group has the Modification Rule Override permission enabled. Any user subscribed to the 'System' User Group is able to perform modifications that are disallowed by the Modification Rules configuration.

Note

This feature is generally made available to users at a supervisory level only, so that they can consider the implications of overriding the system settings before proceeding.

The following figure displays a **Permission Details** window for a CSR Lead Group. The **Override Modification Rule** permission is enabled in the Cross Application Permissions tab.



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Order Modifications

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Configurable Status Modification Rules

Configurable Status Modification Rule is a feature that allows the application to configure a subset of modification rules based on document conditions. The conditions applied are not limited to primary user group, order type, payment status. They are configured by using the condition builder, which is built into the status modification group module.

Status modification groups enable you to configure status modification rules that are based on enterprise, process type, and order conditions. You define a status modification group by configuring the following functions:

- **Modification Rules** - Define modification rules for subscribed modification types.
- **Condition** - Specify a condition for validating the status modification group.
- **Is Override** - Specify the status modification group has priority over other status modification groups.
- **Inherited From Status Modification Group** - Specify the status modification group inherits status modification rules from another status modification group.

Benefits

1. Gives each accessing user group the ability to trigger order modifications based on user-defined conditions.
2. Allows users of different groups to perform various levels of order modification based on the order status.
3. Enables a hierarchical construction of status modification rules, where a parent group can override child group modifications to improve reusability.
4. Extensible conditions support custom hang-off tables for further regulation.

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Order Modifications

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Manager Override

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Many times, there are unusual or exceptional situations that occur when in-store transactions are being performed. These situations call for particular attention on the part of operators or intervention by managers. These situations have implications for maintaining the accuracy and integrity of the transactions. Therefore, handling them properly is important for preventing losses and for the overall success of the retailer.

For a transaction to continue, the operator or a manager need to intervene to either take corrective actions or accept the situation as it is and allow the transaction to continue.

Sterling Selling and Fulfillment Suite provides for provides an *operator override* and *manager override* capability, wherein an operator or a manager can *override* an exception after reviewing it, thereby allowing the transaction to continue.

Business users can define override scenarios that are specific to:

- Orders
- Pricing and promotions
- Payments
- Returns
- Generic override scenarios

Configuration

The configuration aspect of the operator and manager override framework consists of the following major processes:

- **Defining validations**: As a part of this framework, the application defines a valid validation identifier.
- **Defining validation rules**: Once the application has a defined and exposed validation identifier in the system, the framework provides a mechanism to define business detection rules for the validation.
- **Defining overridden rules**: If a violation is detected by an applicable validation rule, then, the system can use the configured overridden rules to process the transaction.

Note

Users can access the override rules framework from Sterling Business Center.

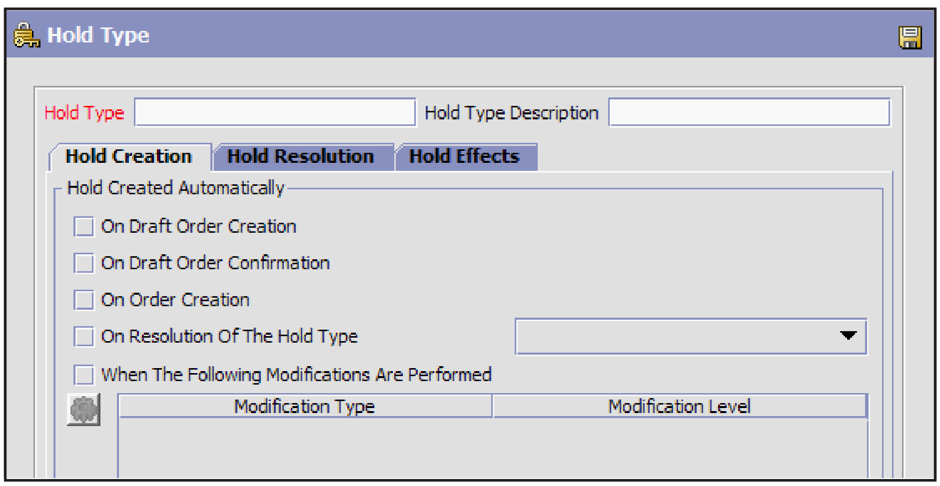
Order Holds

Overview

Orders can be placed on Hold, preventing them from being processed by certain Transactions, and preventing certain Modification Types from being applied. Using the Applications Manager, you can configure which Transactions and Modification Types are disallowed for an Order on a particular Hold Type. Hold types can be created at either the Order or Order Line Level. Orders and Order Lines can be placed on Hold manually or automatically, by applying a particular Hold Type.

Procedure to Create an Order Hold Type

1. Launch **Applications Manager** and go to **Application** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Fulfillment** > **Hold Types**.
2. Click  in the **Order Hold Types** panel to create a Order Hold Type. The Hold Type window displays as shown in the following figure.



3. Enter a name and description for the Hold Type.
4. Enter values for the fields in the **Hold Creation** tab. The main fields are explained:
   - Under the **Hold Created Automatically** panel:
     - Select the condition when an Order Hold should be created automatically.
     - Specify if the Order Hold should be applied to all Orders.

Specify if the Order Hold should be applied for Orders that satisfy a specified condition.

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Order Holds

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Overview

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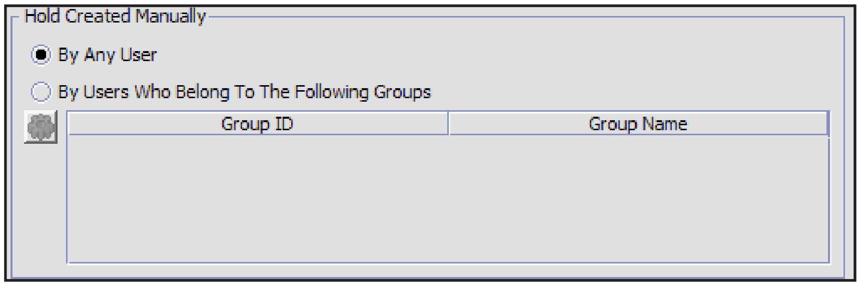
- Under the **Hold Created Manually** panel, as shown in the following figure:



  - Select **By Any User** if all User Groups can apply the Hold to an Order.
  - Select **By Users Who Belong To The Following Groups** if users belonging to certain User Groups can apply the Hold to an Order.

5. Click  to save your changes.

Procedure to Configure Hold Resolution

1. Open the **Hold Type** window for a Hold Type.
2. Click the **Hold Resolution** tab. The fields in the Hold Resolution tab display.

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Order Holds

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Overview

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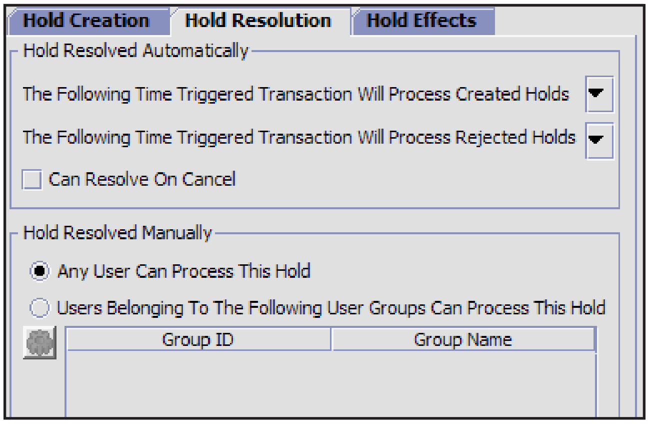
The figure displays a **Hold Resolution** tab.



3. Enter values in the different fields. The fields are explained:
   - Under the **Hold Resolved Automatically** panel:
     - **The Following Time-Triggered Transaction Will Process Created Holds** field enables you to select the Time-Triggered Transaction that processes the created Holds.
     - **The Following Time-Triggered Transaction Will Process Rejected Holds** field enables you to select the Time-Triggered Transaction that processes the Rejected Holds.
     - **Can Resolve on Cancel** option enables you to specify whether the Hold is resolved on Order Cancellation.
   - Under the **Hold Resolved Manually** panel:
     - Specify if any user can process the Hold.
     - Specify if only users of certain User Groups can process the Hold.

4. Click  to save your changes.

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Order Holds

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Overview

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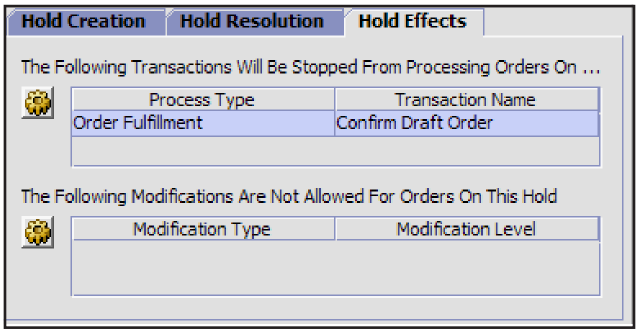
Procedure to Configure Hold Effects

1. Open the **Hold Type** window for a Hold Type.
2. Click the **Hold Effects** tab. The fields in the Hold Effects tab display.

   The figure displays a Hold Effects tab.



3. Enter values in the different fields. The fields are explained:

- **The Following Transactions Will Be Stopped From Processing Orders On This Hold** enables you to specify the Transactions that are disallowed when the Hold Type is applied to an Order.
- **The Following Modifications Are Not Allowed For Orders On This Hold** enables you to specify the Modification Types that are disallowed when the Hold Type is applied to an Order.

4. Click  to save your changes.

Exercise 2.1.2: Create and Add a Hold Type

Scenario

Of late, Matrix is getting reports that orders generated at Matrix-B are being created with fraudulent buyer organizations. To investigate and prevent this problem Matrix decides to place on hold all orders being generated from Matrix-B.

You are required to create a fraud check hold type, MB_Fraud_Check, that is applied to an from the Draft Order Created status.

Instructions

For ease of understanding, the procedure is divided into two parts.

1. Procedure to create a hold type.
2. Procedure to specify hold effects.

Procedure to Create a Hold Type

1. Launch **Applications Manager**.
2. Go to **Applications** > **Distributed Order Management.**
3. Click the **Load Rules for Organization** to select the organization **Matrix.**
4. To configure a **Hold Type**, go to **Document Specific** > **Sales Order** > **Fulfillment** > **Hold Types**. The Hold Type window displays in the work area. Ensure that the configuration for organization **Matrix** is loaded**.**
5. To create a Hold Type, click  in the **Order Hold Types** panel. The Hold Type window displays.
6. Enter the information as specified:

Field	Value
Hold Type	MB_Fraud_Check
Hold Type Description	Fraud Check for Matrix-B
On Draft Order Creation	Checked
On Draft Order Confirmation	Checked
On Order Creation	Checked

(Continued on next page)

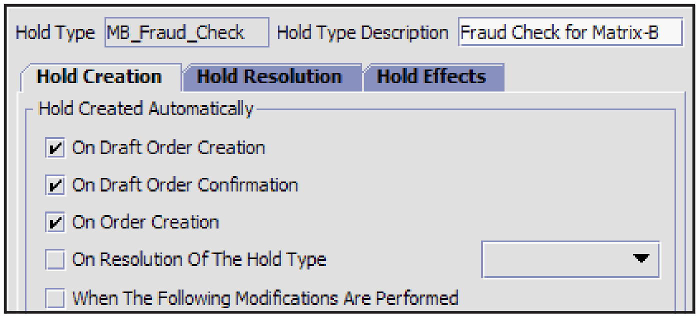
Exercise 2.1.2: Create and Add a Hold Type

(Continued)

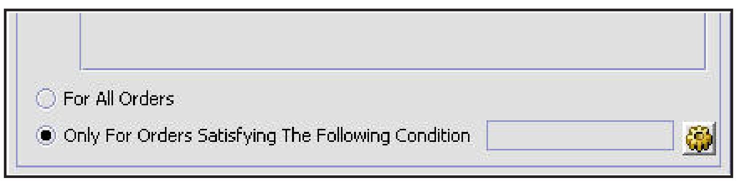
Instructions

....(Continued)

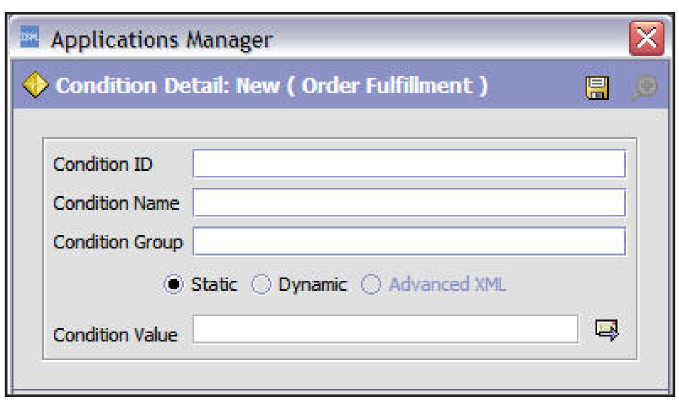
The following figure shows the **Hold Creation** tab.



7. Click . The Hold Type **MB_Fraud_Check** is created.
8. To ensure that this Hold Type is applied to Orders that belong to Matrix-B, configure a condition to check whether the seller organization is Matrix-B. Select **Only For Orders Satisfying The Following Condition** in the same screen. The following figure shows a screen capture showing the **Only For Orders Satisfying The Following Condition** option.



9. Click . The **Condition Detail: New** window displays as shown in the following figure.



(Continued on next page)

Exercise 2.1.2: Create and Add a Hold Type

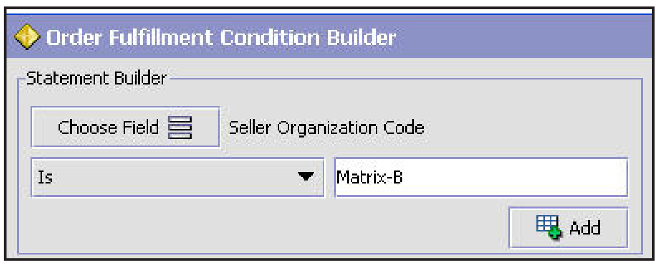
(Continued)

Instructions

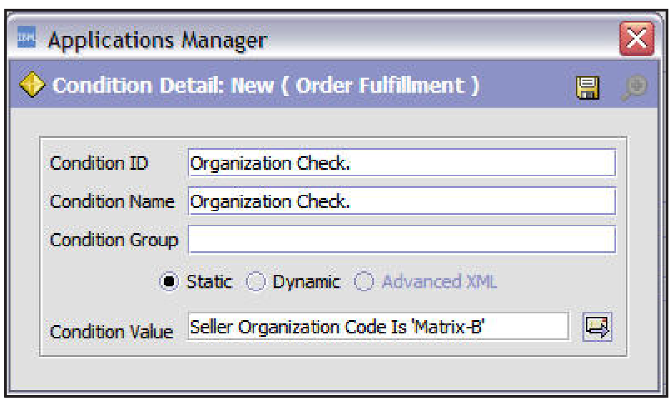
....(Continued)

10. Type Condition ID and Condition Name as **Organization Check.**
11. to specify a condition value, click .the **Order Fulfillment Condition Builder** window displays.
12. to configure the condition to check whether the seller organization of the Sales Order is Matrix-B, click the **Choose Field**. go to **Order Fulfillment > Seller Organization Code**.
13. Type **Matrix-B** in the field next to the menu list.

    The following figure displays an **Order Fulfillment Condition Builder** window.



14. Click the **Add**. The condition statement displays in the Statements panel.
15. Click **OK**. The condition value field in the **Condition Details** window displays the condition. The figure displays the **Condition Details** window.



16. Click . The **MB_Fraud_Check** Hold Type is configured and is applied to orders that belong to Matrix-B only.

(Continued on next page)

Exercise 2.1.2: Create and Add a Hold Type

(Continued)

Instructions

....(Continued)

Procedure to Specify Hold Effects

To prevent Draft Orders from being confirmed when the MB_Fraud_Check Hold Type is applied to the order, you need to associate the Confirm Draft Order Transaction with this Hold Type.

1. To associate the Confirm Draft Order Transaction with the **MB_Fraud_Check** Hold Type, click the **Hold Effects** tab in the MB_Fraud_Check Hold Type window.
2. Click in the **The Following Transactions Will Be Stopped From Processing Orders On This Hold** panel. The Transactions List window displays.
3. Select **Confirm Draft Order** Transaction from the Available panel.
4. Click to subscribe the Confirm Draft Order Transaction to the list of Transactions that is stopped from being processed.
5. Click **OK**.
6. Click .The Confirm Draft Order Transaction does not process Orders on which the Fraud Check Hold Type is applied. This means that all Draft Orders on which the Fraud Check Hold Type is applied will not be confirmed.

Results

If you create a Draft Order with the seller specified as Matrix-B, the order is placed on MB_Fraud_Check Hold. If you try to confirm such an order, an error message displays.

Order Monitoring

Introduction

You can define the Monitoring Components used to measure and report unexpected conditions and delays in an Order Document lifecycle. This is Order Monitoring. A scheduled background program monitors Orders, Order Lines, and Order Releases as they move through their respective Pipelines. There are two types of Order Monitors:

- Status Monitor
- Process Monitor

Alerts

An Alert is a message directed to a user or an alert queue about a Transaction that needs manual intervention. An Alert can come in different formats including email and faxes.

Alerts are generated due to:

- Failures in Order, Shipment, Load, or Inventory Management.
- Informational checkpoints in Order, shipment, load, or Inventory Management.

An alert can have any one of the following Statuses:

Status	Description
Open – Unassigned	The Alert is created but not assigned to a specific user ID or Queue.
Open – Assigned	The Alert is created and assigned to specific user IDs or Queues.
WIP	The Alert resolution is in progress.
Closed	The Alert is addressed and needs no further resolution.

(Continued on next page)

Order Monitoring

(Continued)

Alerts Queues

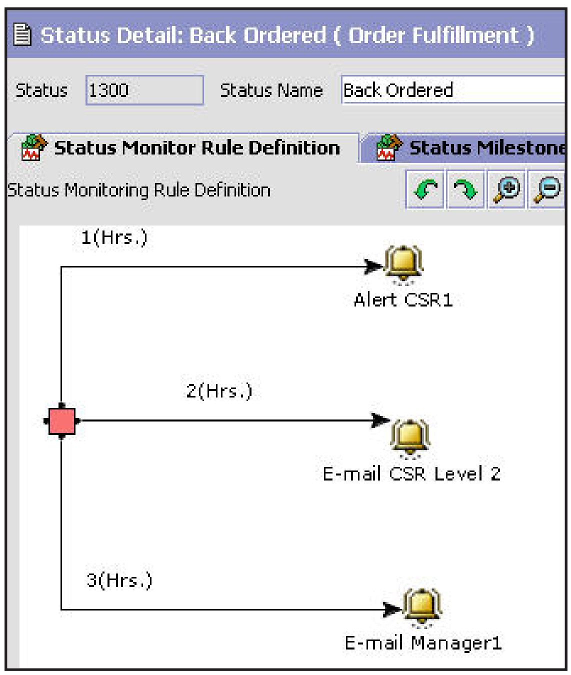
Alert Queues are set up to distribute alerts to users. You can determine which users receive different alert types by assigning them to Queues. You can also set up Alert Priorities and actions raised when certain conditions are met for the Alert.

Status Monitor

A Status Monitor is a type of Order Monitor that monitors Orders that stay in a particular Status for a set amount of time. When the configured time is reached the actions you define in the Status Monitoring Rule definition work area are performed.

Example

In the screen capture, a Status Monitor is configured to Monitor Orders in the BackOrder Status.



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Order Monitoring

(Continued)

Status Monitor

....(Continued)

- If an Order stays in the Back Ordered Status for more than 1 hour, an alert is sent to the Level1 Customer Service Group.
- If it continues to stay in the same Status for more than 2 hours, then an email is sent to the Level 2 Customer Service Group.
- After 3 hours, an email is sent to the manager.

Process Monitor

A Process Monitor performs proactive monitoring of Orders within a Business Process workflow. Process monitors are set up for a specified Pipeline within a process.

When a Process Monitor background program runs, it analyzes each document against the Pipeline Rule Set to determine if the document meets the conditions specified in the Rule Set. If an Order is found that matches the conditions in the Rule Set then the system begins the associated action or service for that condition. The different monitoring components of a Process Type are listed:

- Date Type
- Milestone
- Monitor Events
- Pipeline Monitoring Rules

Example

Monitor Orders that are not released 48 hours before their requested delivery.

Date Type

A Date Type stores the requested Shipment Date. You can define Custom Date Types. These dates automatically display in the configuration screen and the Order or Shipment Dates window in the Application Console.

(Continued on next page)

Order Monitoring

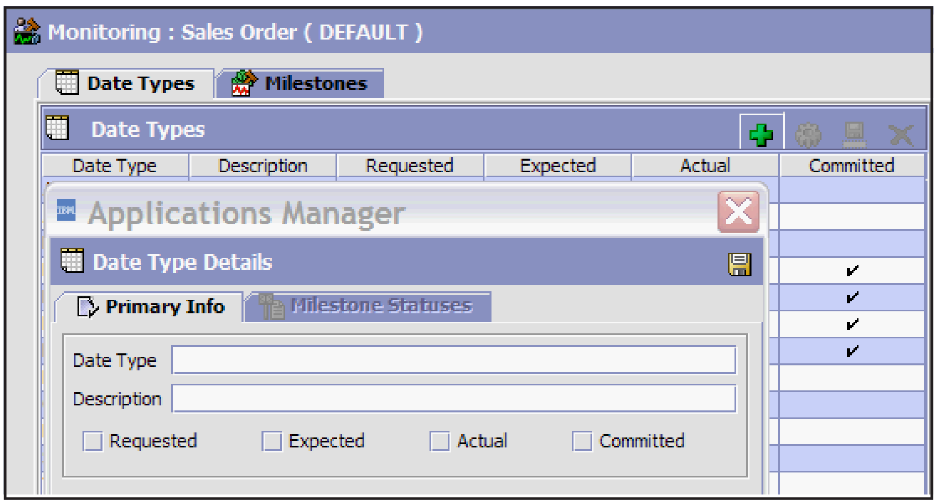
(Continued)

Date Type

....(Continued)

Procedure to Create a Date Type

1. Launch **Applications Manager**.
2. Go to **Application** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Fulfillment** > **Order Monitoring**. The **Monitoring** screen displays.
3. To create a Date Type, click . The **Date Type Details** window displays as shown in the following figure.



4. Enter values in the fields. The main fields are explained.
   - **Requested** specifies that the Date Type is requested by a Buyer, User.
   - **Expected** specifies that the Date Type is expected by the system.
   - **Actual** specifies that the Date Type represents an actual date.
   - **Committed** specifies that the Date Type represents a committed date.
5. Click to save your changes. The new Date Type displays in the Date Types tab.

This step completes the procedure to create a Date Type.

Note

You cannot use date types you created on the Date Type tab. You must create a unique name for a milestone.

(Continued on next page)

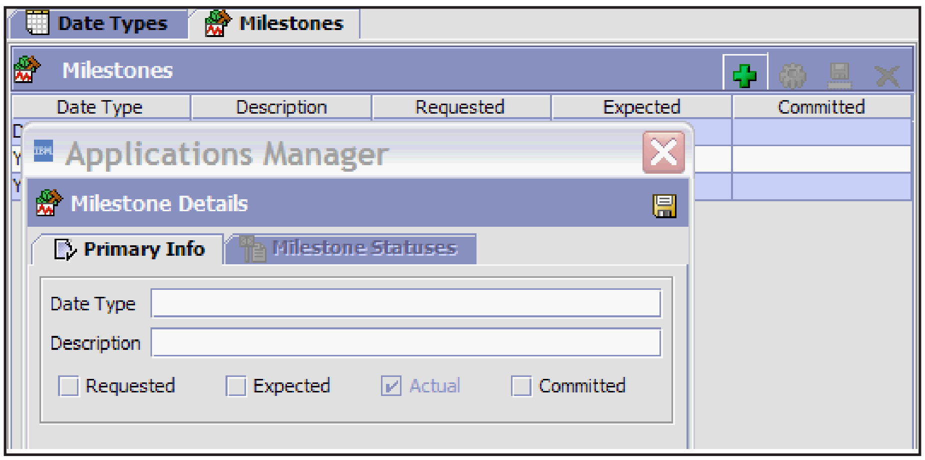
Order Monitoring

(Continued)

Milestone

A Milestone is a type of date that Sterling Selling and Fulfillment Foundation automatically determines when an Order moves from one Status to another. A Milestone represents a significant point in the processing lifecycle that can be used as a criterion for monitoring. Milestones can be defined at the Order, Order Line, Order Release, and Order Release Line Levels.

The following figure displays the **Milestone Details** window.



Procedure to Create a Milestone

1. Log in to **Application Console** by using username as **admin** and password as **password**. Launch **Applications Manager**.
2. Go to **Applications** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Fulfillment** > **Order Monitoring**. The Monitoring screen displays.
3. Click the **Milestones** tab.
4. To create a Milestones, click The **Milestone Details** window displays.

Note

The Milestone Statuses tab becomes active only after you save the Primary Information entered in the Milestone Details window for the Draft Order Created Successfully Milestone.

(Continued on next page)

Order Monitoring

(Continued)

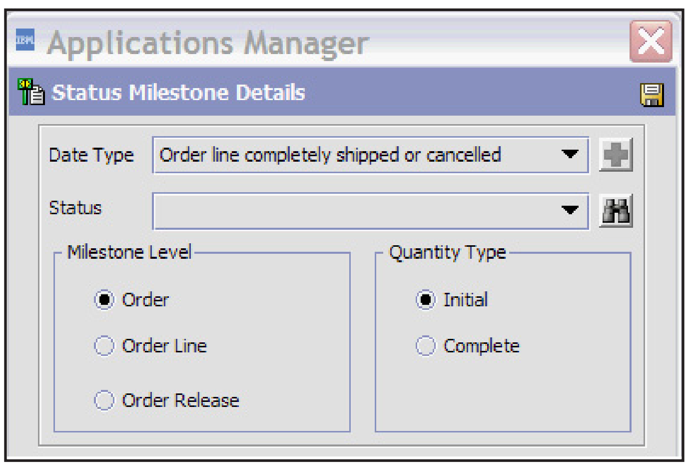
Milestone

....(Continued)

5. Enter values in the fields. The main fields are explained.
   - The **Date Type** field enables you to enter the name of the Milestone.
   - **Requested** specifies that the Milestone is requested by a Buyer, User.
   - **Expected** specifies that the Milestone is expected by the system.
   - The **Actual** field is not applicable for Milestones.
   - **Committed** specifies that the Milestone represents a committed date.
6. Click to save your changes. The new Milestone is displayed in the **Milestones** tab.
7. To specify Milestone Statuses for the new Milestone, double-click the new Milestone from the Milestones List. (Alternatively, you can select the Milestone from the Milestones list and click .

The **Status Milestone Details** window for the selected Milestone displays.

8. Click the **Milestone Statuses** tab. The Status Milestone List panel displays.
9. Click to create a Milestone Status. The **Status Milestone Details** window displays as shown in the following figure.



(Continued on next page)

Order Monitoring

(Continued)

Milestone

....(Continued)

10. Enter values in the fields. The main fields are explained.
    - The **Date Type** field is populated by the system and displays the Milestone description.
    - **Status** enables you to select a Status you want use to indicate that the Milestone is reached.
    - You can specify a **Level**:
      - **Order** indicates that the Status must be reached at the Order Header Level.
      - **Order Line** indicates that the Status must be reached at the Order Line Level.
      - **Order Release** indicates that the Status must be reached at the Order Release Level.
    - You can select one of two **Quantity Type**:
      - **Initial** indicates that the Milestone is met when any quantity at the selected level moves into the Status.
      - **Complete** indicates that the Milestone is met when all quantity at the above selected level moves into the Status.
11. Click to save your changes. The new Milestone Status is displayed in the **Milestone Details** window.
12. Click in the **Milestone Details** window.

This completes the procedure to create a Milestone.

(Continued on next page)

Order Monitoring

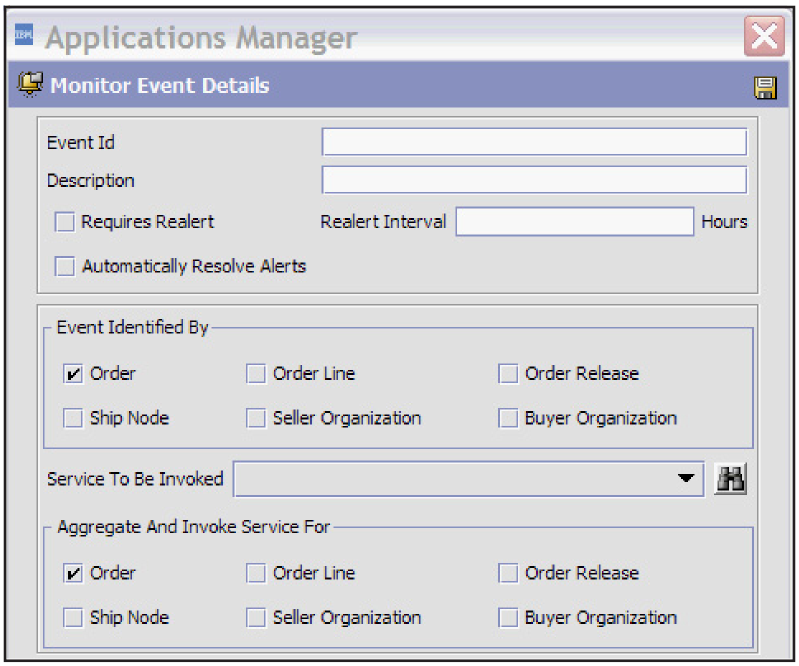
(Continued)

Monitor Events

A Monitor Event starts a service when the Monitoring Rule conditions are met.

Procedure to Monitor Events

1. Launch **Applications Manager**.
2. Go to **Application** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Fulfillment** > **Monitor Events**.
3. To create a monitor event, click . The **Monitor Event Details** window displays as shown in the following figure.



(Continued on next page)

Order Monitoring

(Continued)

Monitor Events

....(Continued)

4. Enter values in the fields. The fields are explained.
   - Enter a unique identifier and name for the Event.
   - Select **Requires Realert** if you want users to be realerted if the issue is not resolved within a certain time frame.
   - **Requires Realert** enables you to enter the Interval (in hours) when realert is sent.
   - Select **Automatically Resolve Alerts** to automatically remove an alert if the Alert Condition is no longer valid. As the alert is resolved, a new alert is raised if the condition is detected again.
   - Under the **Event Identified By** panel, select the level for which you want two or more alert conditions to be treated the same. For example, if you select “Order”, two or more alert conditions is treated the same if they belong to the same Order.
   - For **Services To Be Invoked**, you must select the Alert Service to be started if the Event Consolidation rule conditions are met.
   - Under the **Aggregate And Invoke Service For** panel, select the level for which you want an alert to be raised. For example, if you select “Order”, an alert is raised for an Order when Alert conditions are detected.
5. Click  to save your changes. The new Monitor Event displays in the Monitor Events list on the Monitor Events screen.

(Continued on next page)

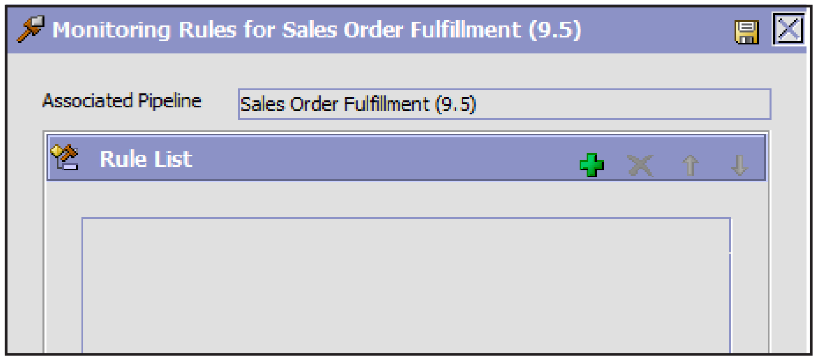
Order Monitoring

(Continued)

Pipeline Monitoring Rules

Pipeline Monitoring Rules are configured using the Monitoring Rule components to monitor Orders and Shipments throughout their lifecycle in fulfillment and Shipment Process Type Pipelines.

The following figure displays a Monitoring Rules for Sales Order Fulfillment window.



Procedure to Create Pipeline Monitoring Rules

1. Launch **Applications Manager**.
2. Go to **Application** > **Distributed Order Management** > **Document Specific** > **Sales Order** > **Fulfillment** > **Fulfillment Process Model**. The **Order Fulfillment** panel displays.
3. Go to **Order Fulfillment Repository** > **Pipelines**. The different Pipelines are displayed.
4. Select a Pipeline and  click the top of the tab. The Monitoring Rules for Sales Order Fulfillment screen displays in the work area.

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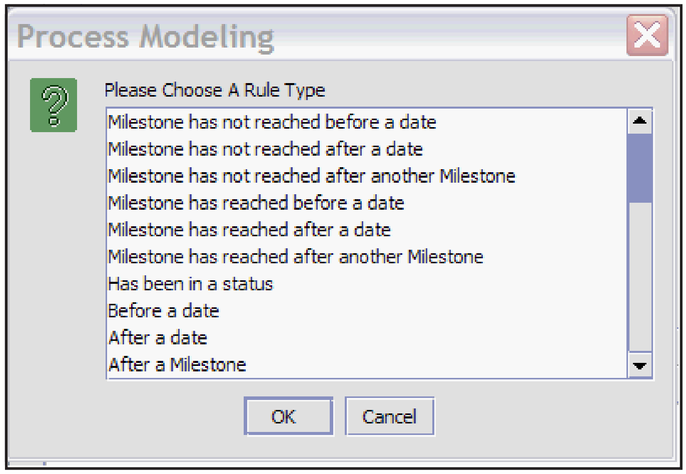
Order Monitoring

(Continued)

Pipeline Monitoring Rules

....(Continued)

5. To create Monitoring Rules, click . The Process Modeling window displays as shown in the following figure.



6. Select a **Rule Type** and click **OK**. The **Rule Structure** displays in the **Rule List** panel as shown in the following figure.

7. In the **Rule List** panel, click each hyperlink to specify a Condition Element.
8. Click to save your changes.

Exercise 2.1.3: Configure a Status Monitor

Scenario

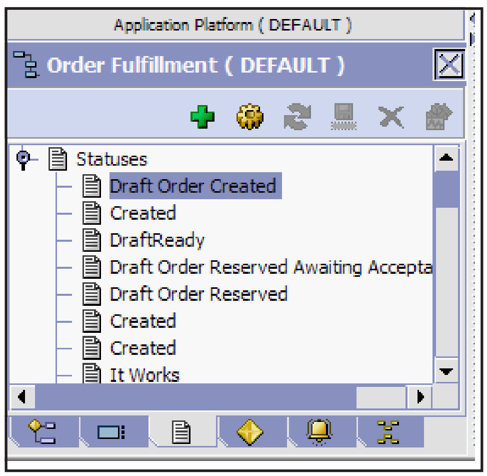
General Holdings is conducting research to determine the number of Draft Orders that translate into Orders.

You are required to create a Status Monitor, that raises an Alert if a Draft Order is in the Created Status for more than 36 hours.

Instructions

Procedure to Configure a Status Monitor

1. Log in to the Application Console by using the username as **admin** and password as **password**. Launch **Applications Manager**.
2. Go to **Applications** > **Application Platform** > **Process Modeling**.
3. Double-click the **Order Fulfillment** Process Type for Sales Order. The **Order Fulfillment Process** repository is displayed.
4. Click the **Statuses** tab at the lower left of the screen, as shown in the following figure.



5. Double-click the **Draft Order Created** Status. The **Status Detail** screen displays.

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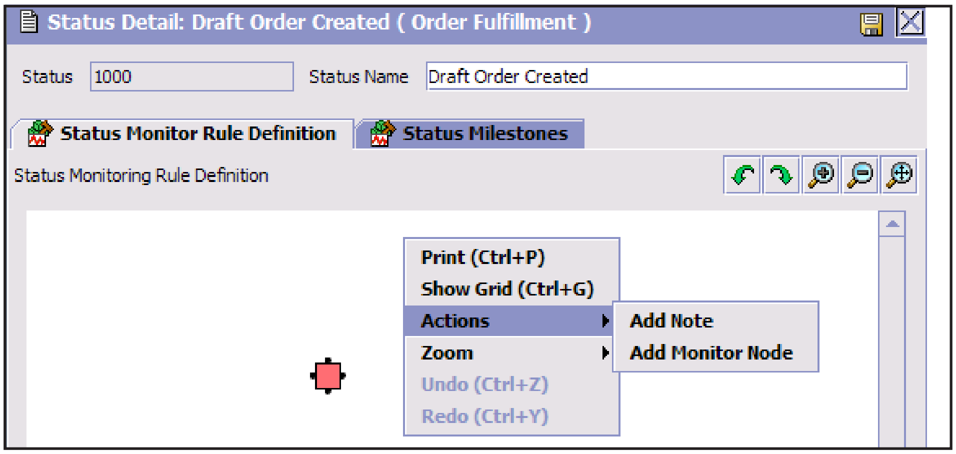
Exercise 2.1.3: Configure a Status Monitor

(Continued)

Instructions

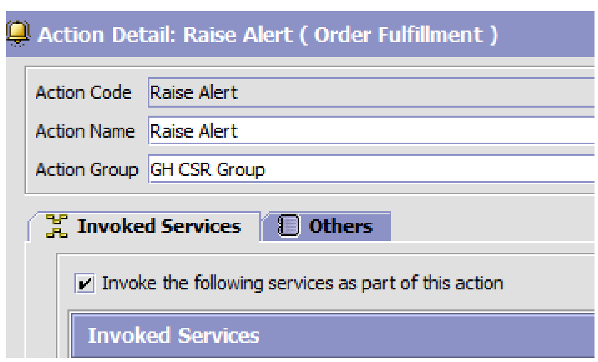
....(Continued)

6. To define a Status Monitoring Rule, you need to add a Monitor Node to the Status Monitoring Rule definition. Right-click in the work area and select **Actions** > **Add Monitor Node**.



A **Monitor Node** is added to the work area.

7. Click the **Actions** tab at the lower left of your screen.
8. Create to create a new Action Group and type the following details.
   - Action Code and Action Name: **Raise Alert**
   - Action Group: **Raise CSR Group**



9. Save the details. This enables the Invoked Services tab.
10. Select the **Invoke the following services as part of this action** option.

(Continued on next page)

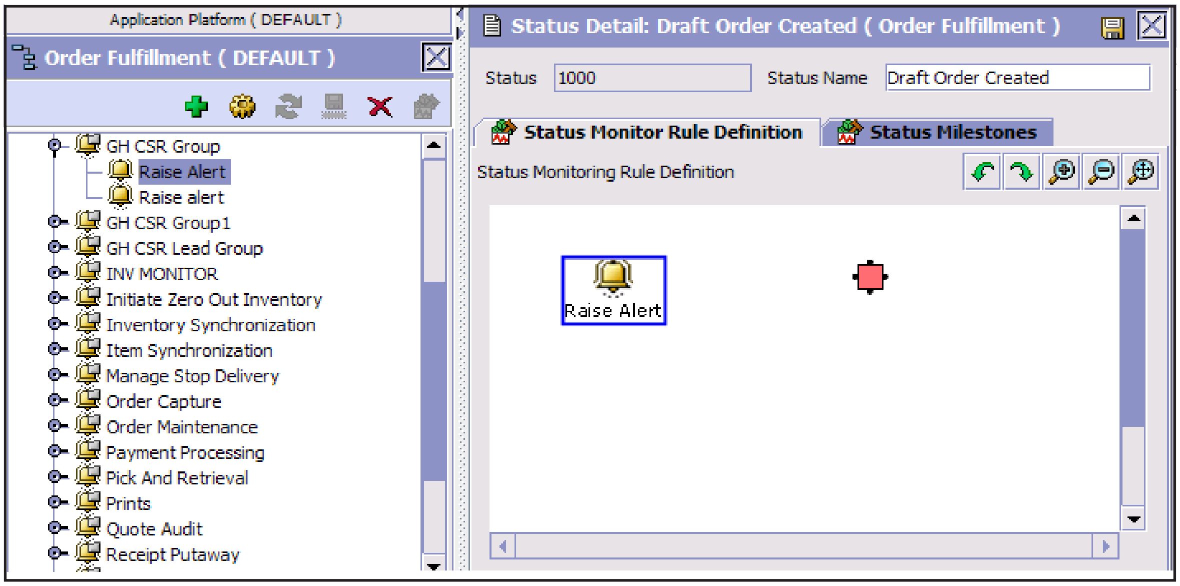
Exercise 2.1.3: Configure a Status Monitor

(Continued)

Instructions

....(Continued)

11. Save the details.
12. Double-click to expand the **GH CSR Group**. Drag the action **Raise Alert** into the work area.



13. Connect the **Monitor Node** to the **Raise Alert** Action by clicking one of the ports (black dots) of the Monitor Node and dragging the arrow to the **Raise Alert**.

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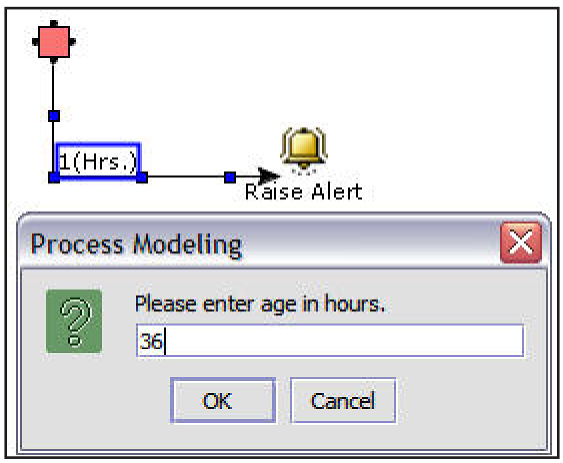
Exercise 2.1.3: Configure a Status Monitor

(Continued)

Instructions

....(Continued)

14. You need to set up the Status Monitor to Raise Alerts if the Order is in the Draft Order Created Status for more than 36 hours. To specify the age of the Status Monitor as 36 hours, follow these steps:
    a. Right-click on **1 (Hour)**.
    b. Click **Change**.
    c. Enter the age as **36 hours**. Click **OK**.



15. Click  to save your changes.

Result

The Status Monitoring Rule ensures that the user is alerted about Orders that is in the Draft Order Created Status for more than 36 hours.

Exercise 2.1.4: Configure a Process Monitor

Scenario

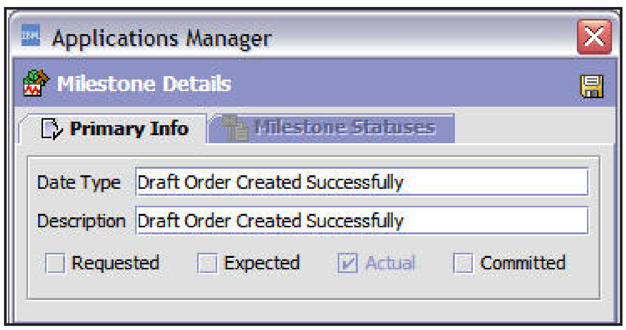
To better monitor the Draft Order Creation Process, Matrix-B wants to create a Milestone called Draft Order Created Successfully.

Assume that you want to create a milestone called Draft Order Created Successfully.

Instructions

Procedure to Configure a Process Monitor

1. Log in to the Application Console by using username as **admin** and password as **password**. Launch **Applications Manager**.
2. Go to **Applications > Distributed Order Management > Document Specific > Sales Order > Fulfillment > Order Monitoring**. The Monitoring screen displays in the work area.
3. Click the **Milestones** tab.
4. To create a Milestone, click .The Milestone Details window displays.
5. Enter the Date Type and Description as **Draft Order Created Successfully**.



6. Click to save your changes. The Milestone **Draft Order Created Successfully** is now created.

Note

The Milestone Details window closes when you click .

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Exercise 2.1.4: Configure a Process Monitor

(Continued)

Instructions

....(Continued)

7. Reopen the Milestone Details window for the **Draft Order Created Successfully** Milestone by right-clicking the **Draft Order Created Successfully Milestone** and selecting **Details**.
8. Click the **Milestone Statuses** tab.
9. To configure the properties of the Draft Order Created Successfully Milestone, click . The **Status Milestone Details** window displays.
10. To associate the Draft Order Created Successfully Milestone with the Draft Order Created Status, select the **Draft Order Created** status from the Status menu list.
11. Select **Order** from the Milestone Level panel. This indicates that the status Draft Order Created must be reached at the **Order Header** Level for this Milestone to be achieved.
12. Select **Complete** from the Quantity Type panel. This indicates that the Milestone is achieved when all quantity at the Order Header level moves into the Draft Order Created Status.
13. Click  in the Status Milestone Details window. This Milestone Draft Order Created Successfully is now associated with the Draft Order Created Status.
14. Click  in the Milestone Details window.

Result

The Milestones list displays Draft Order Created successfully.

Optional Exercises

Create a Hold Type

You need to create a Hold Type, GP_Address_Check, that is used when an Order or Draft Order is created. You also need to specify that this Hold Type is used only if the Buyer Organization code is GoldPride_CS. Also ensure that all Draft Orders on which the Address Check Hold Type is applied is not confirmed.

Instructions

1. Log in to Applications Console using username as **admin** and password as **password**.
2. Launch Applications Manager.
3. Create an Order Hold Type, Address Check.
4. Specify Hold Effects.

Results

If you create a Draft Order with the Buyer specified as GoldPride_CS, the Order is placed on GP_Address_Check Hold. If you try to Confirm such an Order, an error message displays.

Lesson Review

Completed Objectives

This lesson has been designed to enable you to:

- Search and View the Parts of a Sales Order.
- Describe Basic Sales Order Specific Rules.
- Configure Order Modification Rules.
- Create Order Holds.
- Create Order Monitors.