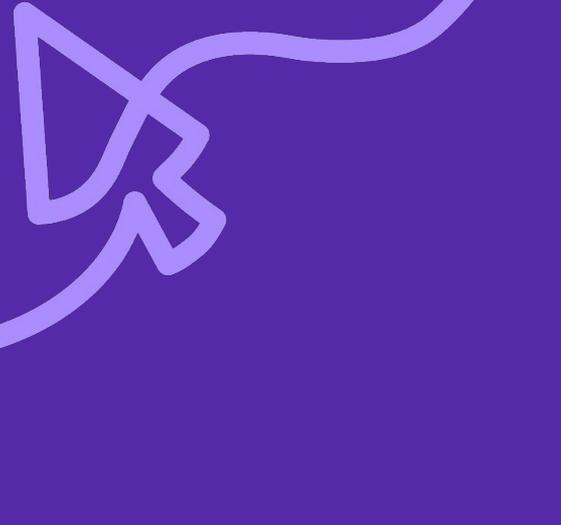# Setup & Configuration

TECHNICAL

In this Lesson...

Get familiar with the suite of Fluent modules & UI by executing essential OMS business scenarios:

01 Understand how Retailers are setup and configured within the platform

02 Understand how to setup & use foundation data, such as Locations, Networks, Users, and Settings

03 Understand how to setup Product Catalogues and Product Data

04 Understand how to setup Inventory, and load and calculate SOH and ATS

05 Understand how to configure Availability and Order Management Workflows

Platform Foundation

Fluent Environments

Sandbox   `https://<ACCOUNTID>.sandbox.<application>.fluentretail.com`

- Multi-tenanted
- Isolated
- Auto-Scaling

- Account types include
  - Client UAT / SIT
  - Partner Account
  - Training Account

- AWS Regions
  - Australia
  - Europe
  - United States
  - South East Asia

Production   `https://<ACCOUNTID>.<application>.fluentretail.com`

- Multi-tenanted
- Isolated
- Auto-Scaling

- Account types include
  - Client Production

- AWS Regions
  - Australia
  - Europe
  - United States
  - South East Asia

Standard Client Agreement
- Shared Environment
- 2 Sandbox Accounts
- 1 Production Account
- Subscription based on Order and Inventory Volumes

Commercially Agreed Client Options
- Dedicated Environment
- Additional Sandbox Account(s)
- Additional Production Account(s)

Partners
- Shared Environment
- 1 Sandbox Account
- 30 day Training Accounts as part of Formal Training

Fluent Accounts

- An account represents a single tenant of the Fluent platform.
- Every account has isolated data stores, application endpoints and the ability to install custom apps.
- An account can manage multiple Retailers.
- The Account ID forms part of the Account specific Fluent platform URLs e.g. *<accountId>.sandbox.api.fluentretail.com*
- New Accounts come with an Account Admin User, which is used to begin the Setup Process.

Fluent Environment

Account 1	Account 2	Account 3	Account 4	Account N
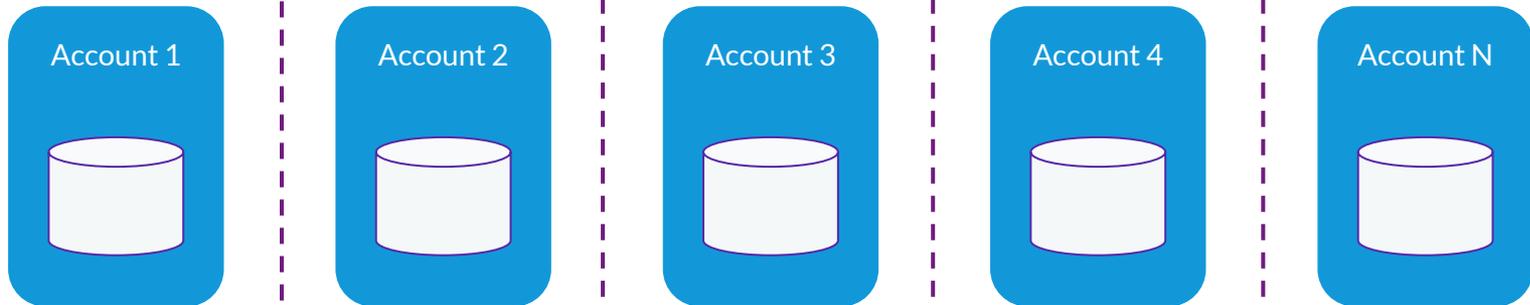
Retailers

- A Retailer is a logical division of an Account.
- Commonly split between Client brands, geographies, or different billing entities within the organisation.
- Each Retailer has its own Customers, Orders, Billing Accounts, and Workflows (Business Logic).
- It can have its own or share Users, Settings, Locations, Networks, Products, Inventory

Fluent Account

Retailer 1

- Users
- Orders
- Workflows (Business Logic)

Retailer 2

- Users
- Orders
- Workflows (Business Logic)

Retailer N

- Users
- Orders
- Workflows (Business Logic)

Possible (but not mandatory) to share data such as
Locations, Networks, Products, Inventory

Locations and Networks

Locations

- A Location represents any physical place, such as a store, warehouse, or collection point.
- Locations may represent third party locations, such as drop ship vendor locations.

Networks

- A network defines a named group of locations for the purpose of separating locations into logical or geographic categories.
- Networks are used for many purposes including:
  - Choosing which locations are available for customer collection or returns.
  - Which should be used to fulfill orders.
  - As a mechanism to share locations between retailers.
  - Grouping of locations for global inventory purposes (available to sell)
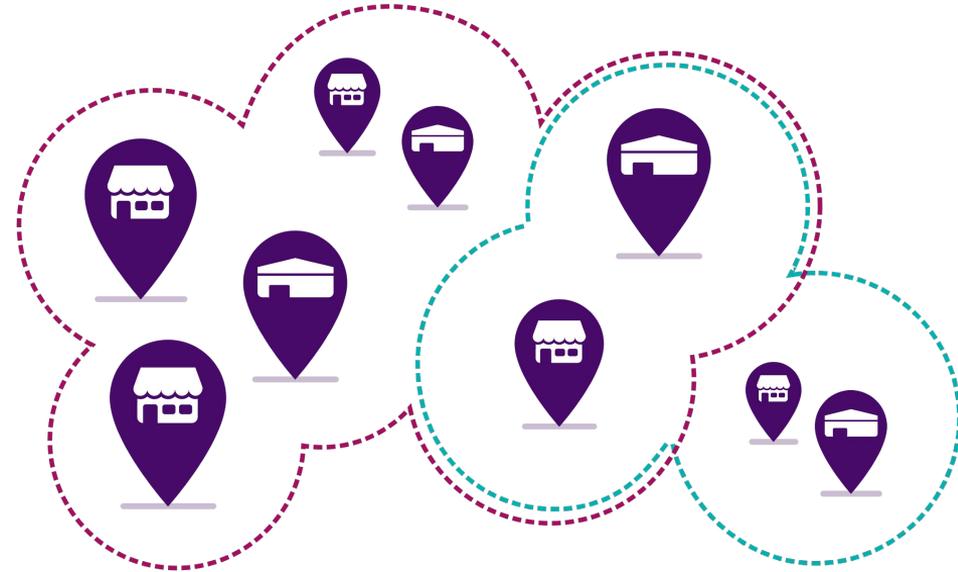
Key

| Click & Collect | Home Delivery | Store | Warehouse |

Users, Roles and Permissions

The Fluent platform comes with user role management which defines what functionalities a user can perform in the Fluent platform. For example, modify a workflow or make changes to a location.

Key features:

- Users can be assigned one or multiple roles
- Creation of custom roles
- Assign permissions to roles

Users with user management permissions can:

- SEARCH and LIST users.
- ADD new users.
- MODIFY existing users.

Users, Roles and Permissions

- User management provides the capability to control who has access to the Fluent platform.

- A user can have multiple roles and each of these roles may be associated with a context which can be the account, any retailer and/or any location within the account

- Custom roles can also be created by the partner

ROLES

- Admin
- Developer
- Store Manager

CONTEXTS

- Retailer
- Account
- Location

Settings

OMS Trainer ◯
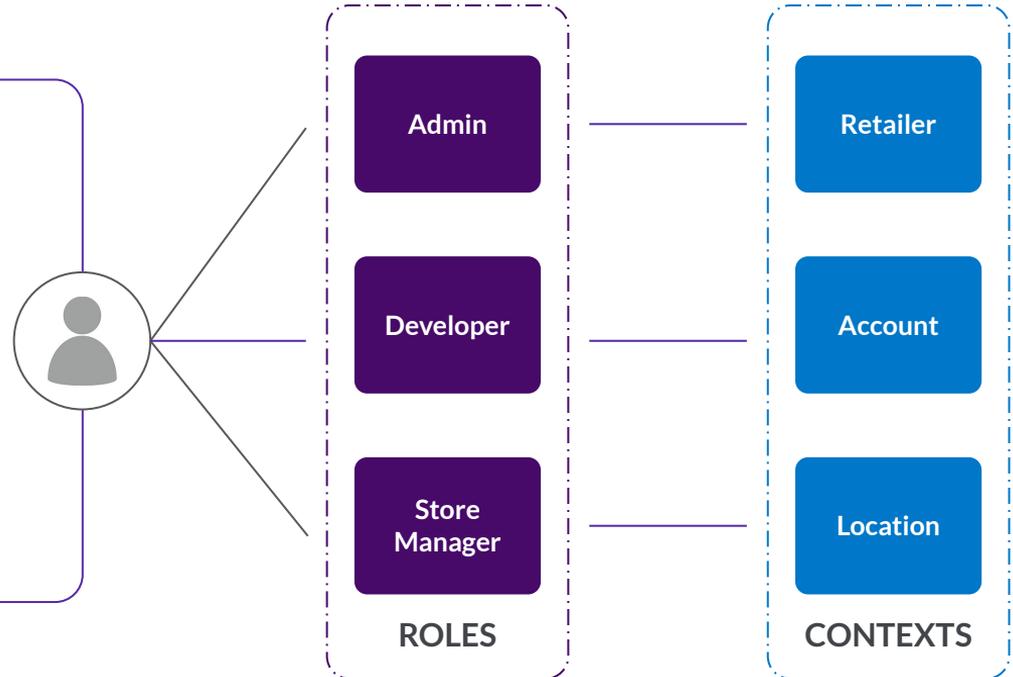
List   ⟳ Refresh

Name	Context	Context ID	Value Type	Value
SERVICEPOINT_MANIFEST	RETAILER	1	JSON	
SERVICEPOINT_COURIER_MANIFEST_STATUSES	RETAILER	1	JSON	
CARRIER.SERVICE.REQUEST.TEMPLATES	RETAILER	1	JSON	
CARRIER.PROVIDER.CONFIG	RETAILER	1	JSON	
CARRIER.SERVICE.RESPONSE.VALIDATION	RETAILER	1	JSON	
ORCHESTRATE_CARRIER_ON_CARRIER	RETAILER	1	BOOLEAN	true
FETCH_USER_COORDINATE	RETAILER	2	BOOLEAN	true
COMPATIBILITY_EVENT_ENABLED	RETAILER	2	BOOLEAN	true
ORDER_ADDRESS_VALIDATION_REQUIRED	RETAILER	2	BOOLEAN	true
	RETAILER	2	BOOLEAN	

Settings are used to enable and disable certain platform features (feature toggles). Each setting can be specified on different levels and are applied in hierarchical order:

- **Account** - Account level setting which applies to all Retailers
- **Retailer** - Retailer level setting which applies to the Retailer
- **Agent** - Agent level setting which applies to the Location

Settings can also be used to specify custom values or toggles which can be used in the Fluent modules. For example, a setting which toggles "warehouse fulfilment only" or a setting which defines environment specific webhook endpoints. Compared to attributes of an entity, settings are more static in nature.
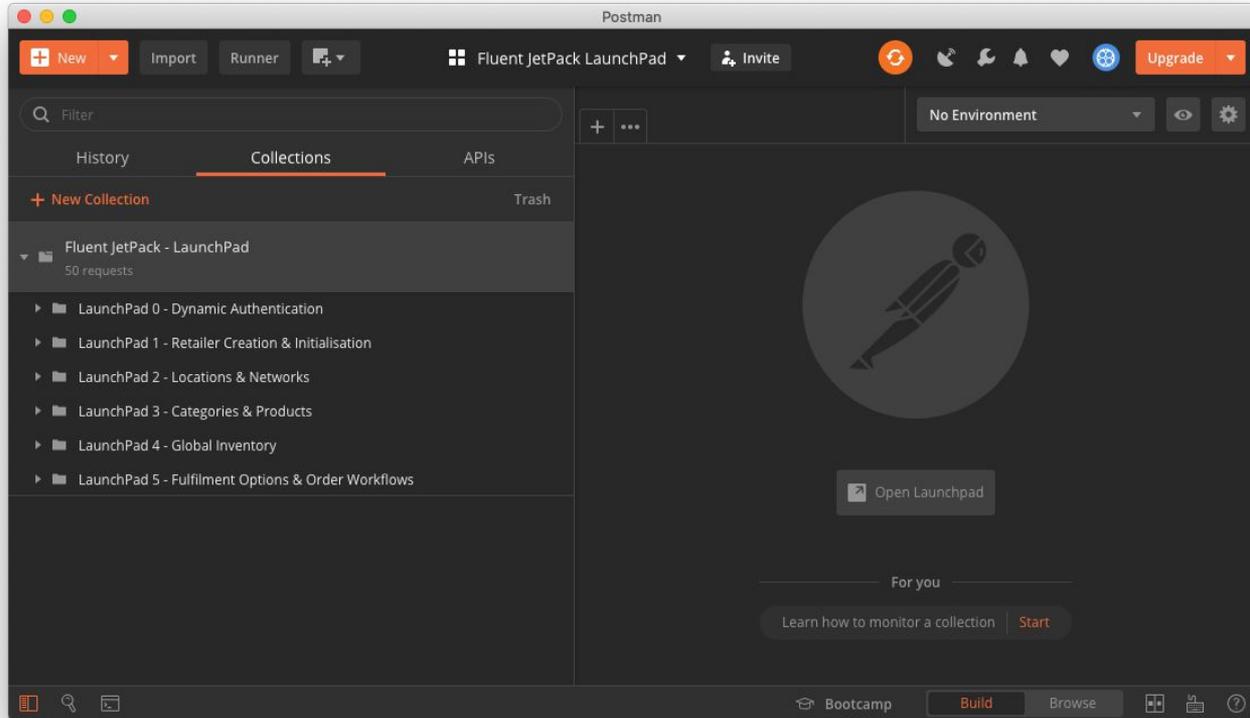
Fluent Launchpad

Fluent LaunchPad

- LaunchPad is a Smart Postman Collection, which enables quick and easy provisioning of a Fluent Account.

- It works by providing Data Files, which contain all the necessary information to fully provision an account for end to end functionality across the platform.

- It can be used via the Postman Runner UI, or via newman, the Postman CLI.

Smart Automation
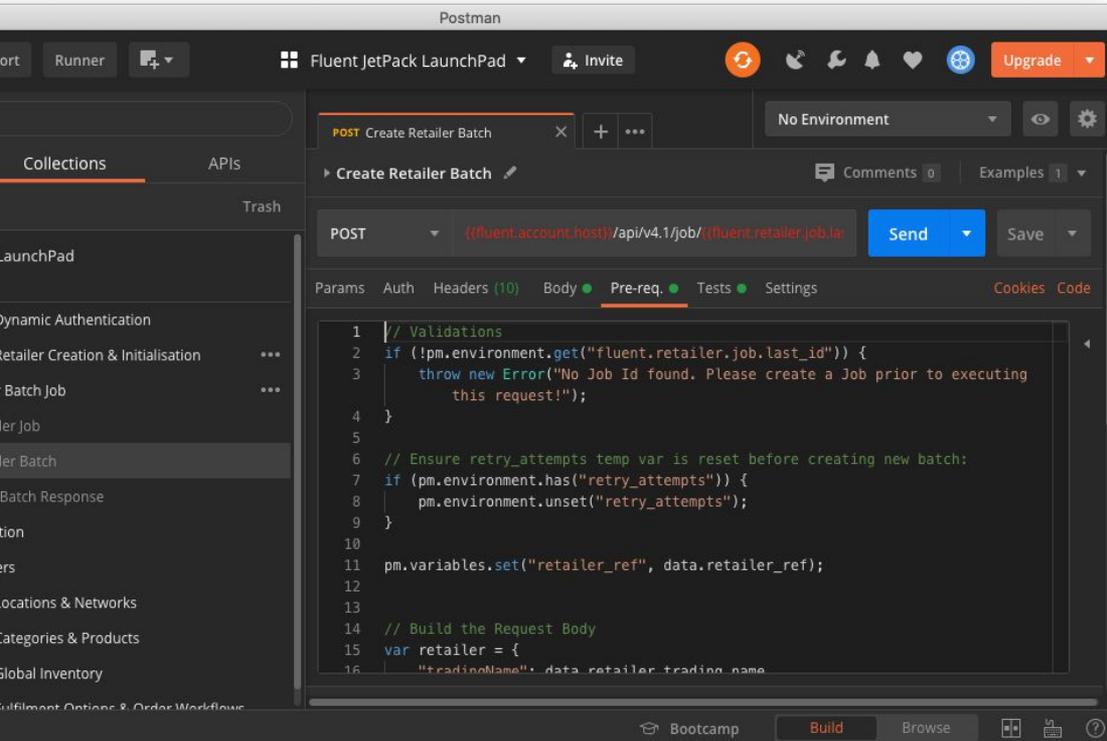
- Postman features advanced automation capabilities, which makes it the perfect tool for a Fluent Account Setup.

- It makes use of Collection, Environment, and Runtime Variables which allow for dynamic configuration of the Requests.

- It also provides pre and post request Javascript Scripting capabilities, which along with the Postman API, provide powerful tooling for controlling request execution, as well as performing various logical behaviour based on the responses from each request.

Collection Runner

- Postman provides a Collection Runner, which allows us to execute a number of API requests in sequence, or in a custom workflow.

- When providing a Data File parameter, it will execute the requests in multiple iterations, based on the number of records provided in the file.

- Since there are hundreds of API requests required to setup a brand new Account for the first time, or create new Retailers, this tool makes the process much more user friendly.
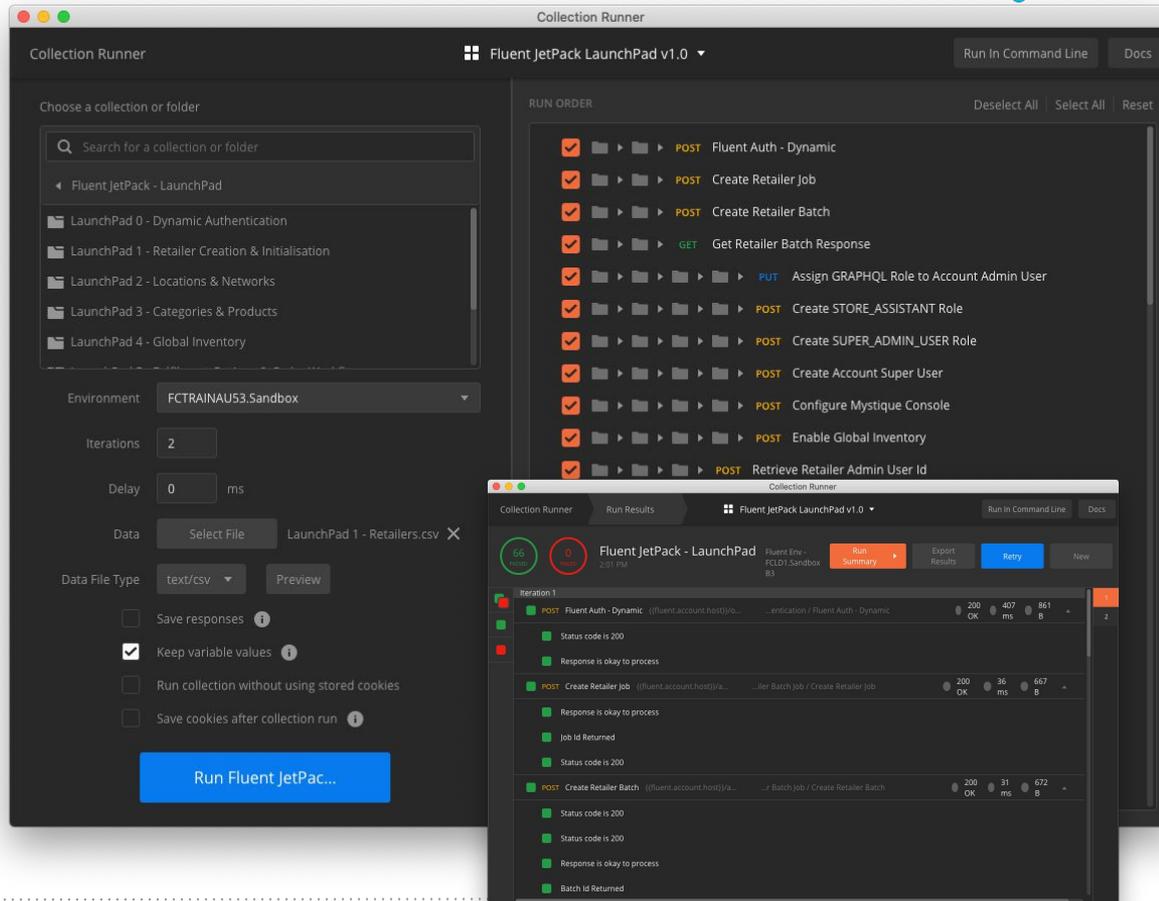
LaunchPad Steps

- The LaunchPad is configured with the appropriate steps required to successfully provision a Fluent Account.

- Prior to the release of this LaunchPad, users often struggled to successfully setup a working account. There can be "gotchas" along the way when doing this manually.

- You will see there are 6 folders in the collection, LaunchPad 0 to 5:

    - LaunchPad 0: Dynamic Authentication

    - LaunchPad 1: Retailer Creation & Initialisation

    - LaunchPad 2: Locations & Networks

    - LaunchPad 3: Categories & Products

    - LaunchPad 4: Global Inventory

    - LaunchPad 5: Fulfilment Options & Order Workflows

LaunchPad 0: Dynamic Authentication

- This is the initiating request within the Collection, and therefore always the first to be executed by the Collection Runner.

- It is executed multiple times within a single execution, authenticating different users based on the current state of the runner.

- Since it is the first request, it is also the first opportunity for the LaunchPad to use logic, for example, detect which Data File is being passed to the Run, and direct the next request to be executed to the appropriate folder.
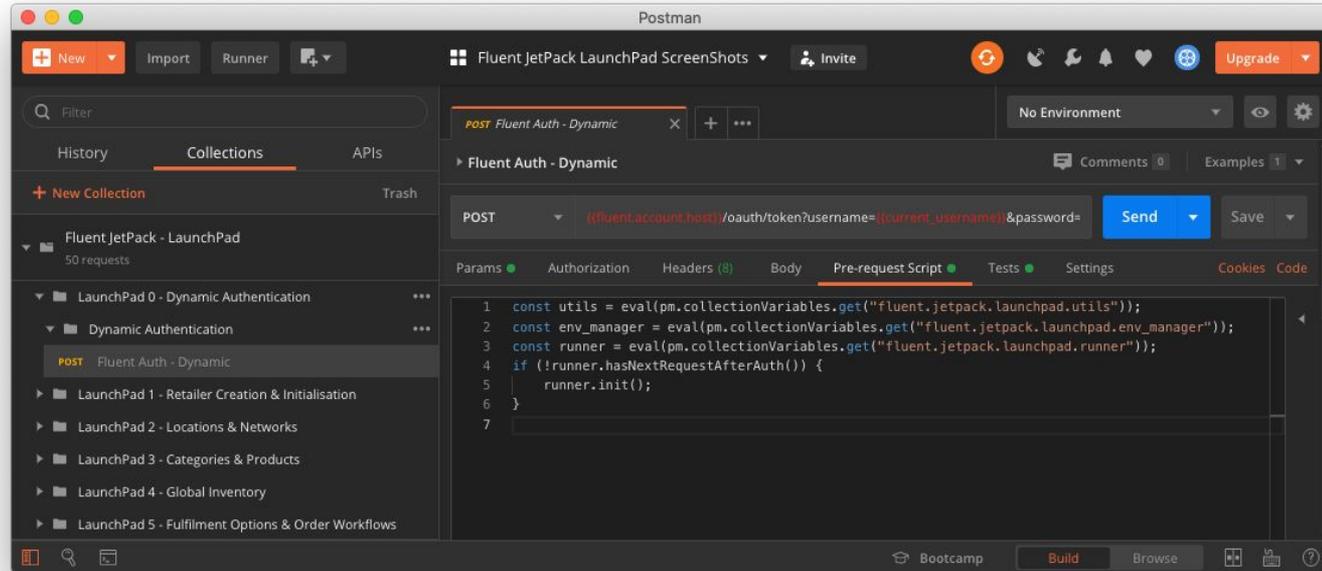
LaunchPad 1: Retailer Creation & Initialisation

Step 1: Create each Retailer

Step 2: Initialise Account

Step 3: Initialise each Retailer

For each Retailer in the Retailers File:
- Create Job
- Create Batch
- Poll Get Batch until status COMPLETE

Initialise the Account:
- Assign GRAPHQL Role to Default Account Admin
- Create new STORE_ASSISTANT role
- Create new SUPER_ADMIN_USER role
- Create new Account Superuser
- Configure OMX UX Framework in Fluent OMS (manifest + lang)
- Enable GI (GI + Batch Enhancement)

For each created Retailer:
- Assign SUPER_ADMIN_USER role to Retailer User
- Assign ORCHESTRATION_ADMIN to Retailer User
- Assign GRAPHQL Role to Rubix User
- Activate OMX Workflow Framework (Rubix + Wave)
- Configure Pick Pack Lists (GI at Retailer (WA), Allow Article After Pack)
- Create Reject Location & Demo Carrier

The Setup

Sample Data Account Setup

1. Account

2. Retailers

3. Locations

4. Networks

Account: FCTRAINAUxx

Retailer 1: FC Fashion

Retailer 2: FC Sports

FC_GROUP_HD

F_HQ (Sydney / AU)

S_AKL (Auckland / NZ)

F_NSYD (North Sydney / AU)

F_SYD (Sydney / AU)

F_MEL (Melbourne / AU)

F_CC

S_CC

S_BNE (Brisbane / AU)

S_NTL (Newcastle / AU)

S_SYD (Sydney / AU)

FC_GROUP

5. Product Catalogue (PC)

PC ref: FCRG:PC:MASTER

7. Inventory Catalogue (IC)

IC ref: DEFAULT:1

6. Virtual Catalogues (VC)

VC ref: VC:ATS:HD

FC_GROUP_HD

VC ref: VC:ATS:CC:1   F_CC

VC ref: VC:ATS:CC:2   S_CC

Data Files

Name	Date Modified	Size	Kind
LaunchPad 1 - Retailers.csv	19 Feb 2020 at 22:24	216 bytes	CSV Document
LaunchPad 2.1 - Locations.csv	19 Feb 2020 at 22:25	2 KB	CSV Document
LaunchPad 2.2 - Networks.csv	19 Feb 2020 at 22:25	427 bytes	CSV Document
LaunchPad 3.1...Catalogues.csv	19 Feb 2020 at 22:25	191 bytes	CSV Document
LaunchPad 3.2...Categories.csv	19 Feb 2020 at 22:25	427 bytes	CSV Document
LaunchPad 3.3 - Products.csv	19 Feb 2020 at 22:25	3 KB	CSV Document
LaunchPad 4.1...Catalogues.csv	19 Feb 2020 at 22:25	630 bytes	CSV Document
LaunchPad 4.2...atalogues.csv	19 Feb 2020 at 22:23	209 bytes	CSV Document
LaunchPad 4.3 - Inventory1.csv	19 Feb 2020 at 22:25	728 bytes	CSV Document
LaunchPad 4.3 - Inventory2.csv	19 Feb 2020 at 22:25	728 bytes	CSV Document
LaunchPad 5.1...nt Options.csv	19 Feb 2		
LaunchPad 5.2 - Orders.csv	19 Feb 2		

- Each Sample Data File will be loaded via the Fluent LaunchPad one by one.

- The LaunchPad will detect the type of file, and execute only the requests required to configure and load the data.

- The Header line defines the data variables used by Postman

- The Collection Runner will execute an iteration for each record in the data file.

LaunchPad 1 - Retailers.csv   UNREGISTERED

LaunchPad 1 - Retailers.csv ×

```
1  retailer_ref,retailer_trading_name,retailer_contact_person_email,retailer_contact_person_phone
2  fc_fashion,FC Fashion,{{$randomEmail}},{{$randomPhoneNumber}}
3  fc_sports,FC Sports,{{$randomEmail}},{{$randomPhoneNumber}}
```

Line 1, Column 1   develop [1]   Tab Size: 4   CSV (Rainbow)

Users

User	Level / Type	Roles	Description
<ACCOUNTID>_admin Example: fctrainau101_admin	ACCOUNT	ADMIN	Default Admin User provided with each Account.
<ACCOUNTID>_super Example: fctrain101_super	ACCOUNT	SUPER_ADMIN_USER	LaunchPad creates a new User with a new Role containing ALL permissions. This is required for the successful setup of the Account.
<RETAILER_REF>_admin Example: fc_fashion_admin	RETAILER	ADMIN SUPER_ADMIN_USER ORCHESTRATION_ADMIN (Account Level)	Default Retailer Admin User created as part of the Retailer batch. LaunchPad will assign the new Super User Role containing ALL permissions, as well as the Orchestration Role at Account level.
<ACCOUNTID>-<RETAILERID>-rubix Example: FCTRAINAU101-1-rubix	RETAILER	ADMIN GRAPHQL (Account Level)	Default User created as part of the Retailer batch that the Workflow Framework uses to execute API calls from within workflows. LaunchPad will add an existing GraphQL Role at Account level.
<LOCATION_REF>@<RETAILER_REF>.<domain_suffix> Examples: F_syd@fcfashion.com.au, S_akl@fcsports.co.nz	AGENT	STORE_ASSISTANT	LaunchPad creates a new User per Location with a new Role containing all required GI / GraphQL permissions for a Store Assistant.

Configuration Settings

Setting Name	Context Level	Description
ADMIN_CONSOLE_MANIFEST	ACCOUNT	Mystique Manifest file configuring the Fluent OMS UI.
LANGUAGE_EN-AU	ACCOUNT	Language file for the Fluent OMS.
GLOBAL_INVENTORY_ENABLED	ACCOUNT	Configures the Account to use the Inventory data model
INVENTORY_BATCH_ENHANCEMENT_ENABLED	ACCOUNT	Configures the INVENTORY Batch API to process the Batch via the Workflow Framework
RUBIX_ENABLED	RETAILER	Enables OMX Workflow Framework
WAVE_RUBIXIFIED	RETAILER	Enables OMX Workflow Framework for Fluent Store
GLOBAL_INVENTORY_ENABLED	RETAILER	Required at RETAILER level for Pick & Pack Lists when Account GI enabled
ALLOW_CREATE_ARTICLE_AFTER_PACK	RETAILER	Required for Pick & Pack Lists in GI mode
PICK_N_PACK_TIME_LIMIT	AGENT	The amount of time a Fulfilment will remain assigned to a specific location before expiring and being reassigned

Labs

Summary

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04 Understand how to setup Inventory, and load and calculate SOH and ATS

05 Understand how to configure Availability and Order Management Workflows

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