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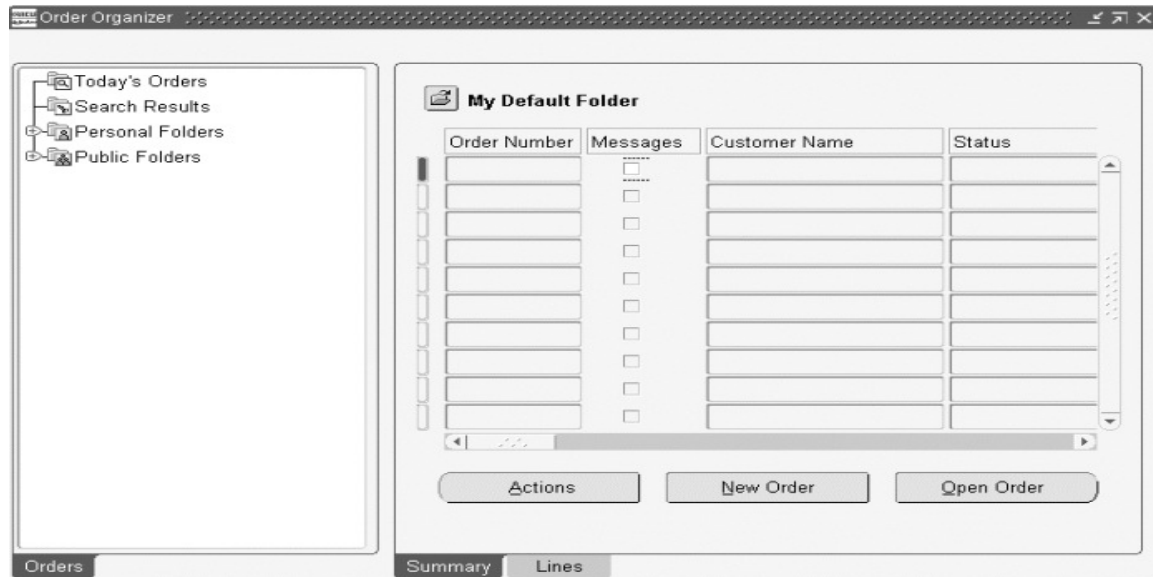
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****This is just a quick glance overview of Order management to explain high level capabilities of OM module.**

Order Management Overview

Order Management provides you with the tools to manage your sales orders and control your operations. Orders for your organization can be managed thru Order organizer/workbench which is a one place stop for any orders that you have with facility to Find Orders, Order Organizer, Sales Orders, Order Mass Change, and Line Mass Change windows. These windows enable you to enter, update and find your existing Orders and Returns. They also provide you access to a variety of operations you can perform on Orders and Returns.



- Today's Orders--displays all orders entered today by the current user.
- Search Results--displays all orders or lines matching your query criteria.
- Personal Folders--displays personal user-defined queries for all orders or returns you have previously saved.
- Public Folders--displays saved queries visible to all users.

You can also be notified of any pending messages for an order/line. Using the profile option, OM: Show Process Messages Flag you can control whether or not the Message check box will appear

You can take following actions on the order you've selected using action button

- Additional Order Information
- Apply Automatic Attachments
- Book Order
- Calculate Tax
- Service Contract Details
- Horizontal Demand
- Additional Line Information
- Apply Holds
- Cancel
- Charges
- Copy
- Installation Details

Sales Order Overview

You can enter, view, and update sales orders using the Sales Orders window. You can also enter returns using the Sales Orders window. You can order standard items, both shippable and non-shippable, and configurations using this window. You can also adjust pricing, assign sales credits, record payment information, attach notes, schedule shipments, query item availability, and make reservations, including selection of subinventories. You can enter information in the Sales Orders window as you receive it. Order Management validates individual fields as they are entered. When you book an order, Order Management validates to ensure that all required fields have values, that configurations are complete, and so on. After an order has been booked, it becomes eligible for the next step in its workflow. For orders that you intend to source externally (drop shipments), you can use all aspects

of standard sales order functionality. The source type at order entry determines whether an order will be fulfilled from inventory or by an external supplier. Order Management Order organized on following tabs to enable users to provide information about the order

- Order Information--enter header level information.
- Main--enter customer information at the header level.
- Others--enter payment terms, shipping information and other header information.
- Line Items--enter line level information.
 - Main
 - Shipping
 - Returns
 - Others
 - Pricing
 - Addresses
 - Services

Use Open Order Button to View section order that you want to action

Ship To Contact	
Customer	Computer Services and ...
Customer Number	1006
Ship To Contact	Brown, Geny Mr.
Customer Contact	Brown, Geny Mr.
Ship To Location	Chattanooga (OPS) 301 Summit Hill Drive Chattanooga, TN, 37401, L
Bill To Location	Chattanooga (OPS) 301 Summit Hill Drive Chattanooga, TN, 37401, L

Order Number	63472
Order Type	Order Only
Date Ordered	30-MAY-2003 08:47:41
Price List	Corporate
Salesperson	Lewis, Mr. David
Status	Entered
Currency	USD
Subtotal	0.00
Tax	0.00
Charges	0.00
Total	0.00

Use Action Button to Do any of following

- Add Customer
- Apply Automatic Attachments
- Calculate Tax
- Charges
- Go To Line
- Installation Details
- Notification
- Price Line
- Promotion/Pricing Attributes
- Release Workbench
- Split Line
- View Adjustments
- View Tax Details
- Related Items--opens a window to choose related items.
- Additional Order Information
- Apply Holds
- Cancel
- Copy
- Horizontal Demand
- Service Contract Details
- Price Order
- Progress Order
- Release Holds
- Sales Credits
- Supply to Order Workbench
- View Shipping Status

Once you have supplied information about Customer, Where to ship & bill, pricing etc click on others tab to provide SHIPPING INSTRUCTIONS Enter instructions for local country carriers, this will be

interfaced at the warehouse. PACKING INSTRUCTIONS Optional - Enter instructions if required, this will be interfaced at the warehouse

Payment Terms: 030d 30 FPD

FOB: Buyer

Shipping Instructions: Delivery has to be done b

Tax Handling: Standard

Exempt Reason:

Amount:

Credit Card Type:

Card Holder:

Approval Code:

Order Source: Online

Sales Channel: CI Corporate

Shipping Method:

Freight Terms: CIP

Shipment Priority: Special Priority

Packing Instructions: The packing has to be do

Tax Exempt Number:

Payment Type:

Credit Card Num:

Card Expiration Date:

Prepaid Amount:

Order Source Reference: OE_ORDER_HEADERS_AL

After completing the basic information about the order, proceed to enter items that are being sold on Line Items tab.

Order Information | Line Items

OM

Order Total: 6,040.00

Main | Pricing | Shipping | Addresses | Returns | Services | Others

Line	Ordered Item	Qty	Line Type	Item Description	UOM	Unit Price	Request Date
1.1	7157A003BA	2	STANDARD	IR1600 230V AMS (SZ	EA	1,720.00	10.01.2005 12 1
2.1	6836A002AA	2	STANDARD	C.EXV 5 TONER BK E	EA	0.00	10.01.2005 12 1
3.1	7160A003AA	2	STANDARD	ADF-J1 (A)	EA	0.00	10.01.2005 12 1
4.1	6837A003AA	20	STANDARD	DRUM IR1600/2000	EA	130.00	10.01.2005 12 1

Line Total: 3,440.00 | Line Qty: 2 | Service Total: 0.00

Description: IR1600 230V AMS (SZX)

Use this tab to enter information of what you are shipping in the selected order, how much quantity & what's the unit price of each item, when is it needed?

Order Information | Line Items

OM

Order Total: 6,040.00

Main | Pricing | Shipping | Addresses | Returns | Services | Others

Line	Ordered Item	Qty	Wareh	Subinventory	Receiving Qty	Ship Set	Sched. Ship	Sch. Arrival Date
1.1	7157A003BA	2	ELC	A-STOCK		1	11.01.2005 2	11.01.2005 23:55 10
2.1	6836A002AA	2	GSW	SPARES A		2	11.01.2005 2	11.01.2005 23:55 10
3.1	7160A003AA	2	ELC	A-STOCK		1	11.01.2005 2	11.01.2005 23:55 10
4.1	6837A003AA	20	GSW	SPARES A		2	11.01.2005 2	11.01.2005 23:55 10

Line Total: 3,440.00 | Line Qty: 2 | Service Total: 0.00

Description: IR1600 230V AMS (SZX)

Use Shipping tab to enter from which warehouse you'll be shipping the order & what are the scheduled shipment/arrival dates.

à After this step, Book the Order on Order Information Main tab (job done so simple or is it!!)

Deeper Dive in to Order Management Features

After this so simple preview of Booking orders, let's have a look at more advance facility that this module has to offer.

Order Mass Change Window Order Management offers a mass change feature which enables you to change attributes on multiple orders. In the Order Organizer, multi-select the orders you want to apply changes to and choose Mass Change from the Tools menu.

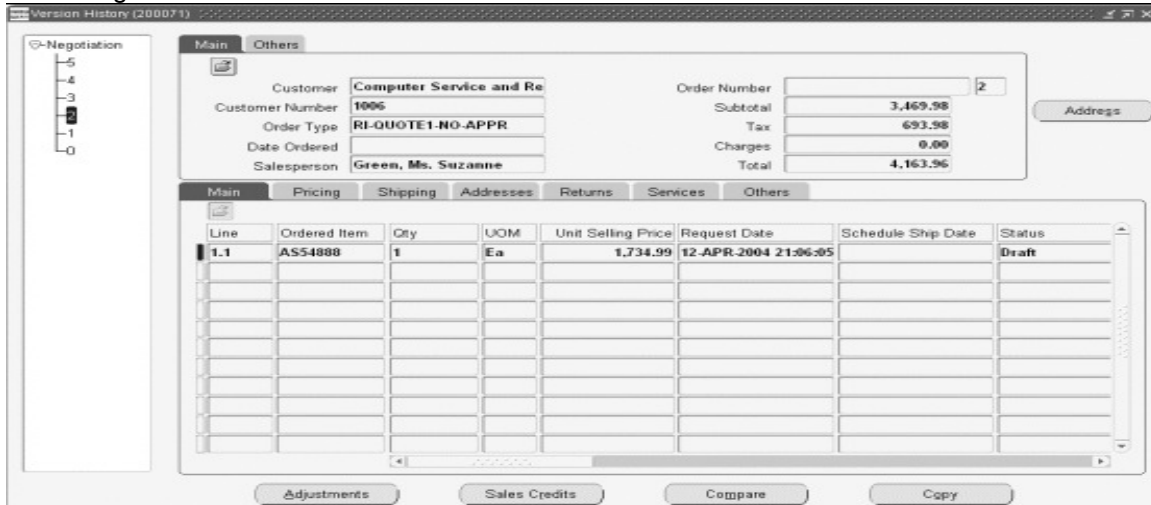
- Main--enter mass changes for basic order information at the order level.
- Pricing--enter updates to pricing information.
- Shipping--enter updates to shipping information.
- Addresses--enter updates to address information.

Line Mass Change Window

The Line Mass Change window enables you to change attributes on multiple lines. Multi-select the order lines you want to apply changes to and choose Mass Change from the Tools menu.

- Main--enter updates to basic line information at the line level.
- Pricing--enter updates to pricing information at the line level.
- Shipping--enter updates to shipping information at the line level.
- Addresses--enter updates to customer address information at the line level.
- Returns--enter updates to returns information at the line level.
- Services--enter updates to service information at the line level.
- Others--enter updates to basic line information at the line level.

Versioning is a method to capture changes and updates made to any transaction, that includes sales orders, quotes, and Blanket Sales Agreements. The history of changes that are made to a transaction are captured and stored, available to be viewed and compared later. This is especially useful while negotiating the order & different stages of order can be compared any time using this feature.



From the Version History window you can select a version and compare it against previous or latter versions, by using Actions > Compare.

1. Create and save original transaction (Sales Order, Quote, Blanket Sales Agreement).
2. Make changes to the transaction
3. Manually select the create version action and enter a new version number, Reason, (mandatory) and Comment (The default version number is 0; the user can override this with 1). Alternatively override the version number and at save, the reason window will open to allow entry.
4. Save the transaction. The user transaction is the active version. The original transaction is backed up as history.

Sales Orders Customization

You can customize the appearance of the Sales Orders window to meet your needs. Using standard folders functionality which provides the ability to hide, show or change the appearance of your folders.eg

- Bill To
- Bill To Customer
- Sales Channel
- Ship To Contact/Customer
- Component Number
- Internal Item
- Item Revision/Type
- Bill To Address
- Bill To Customer Number
- Ship From Location/Ship To
- Pending Amount/Prepaid Amount
- Customer Job
- Invoiced Quantity
- Invoicing Rule/Tax Code/Date
- Bill To Contact
- Deliver To Contact/Customer
- Ship To Address
- Deliver To Contact/Customer
- Customer Number
- Item Description/Identifier Type

Quick Sales Orders Window

Using Quick Sales Orders, you can configure your user interface to meet your business flow needs, making the input intuitive for the user with minimal training. Pricing can be deferred until the lines are saved, thereby optimizing processing time.

Header Region

The window displays the following fields at the header region, and the header block is folder enabled. The Others tab is hidden by default

Main Region displays

- Customer Name, Order Type, Customer PO, Order Number, Subtotal, Tax, Charges,

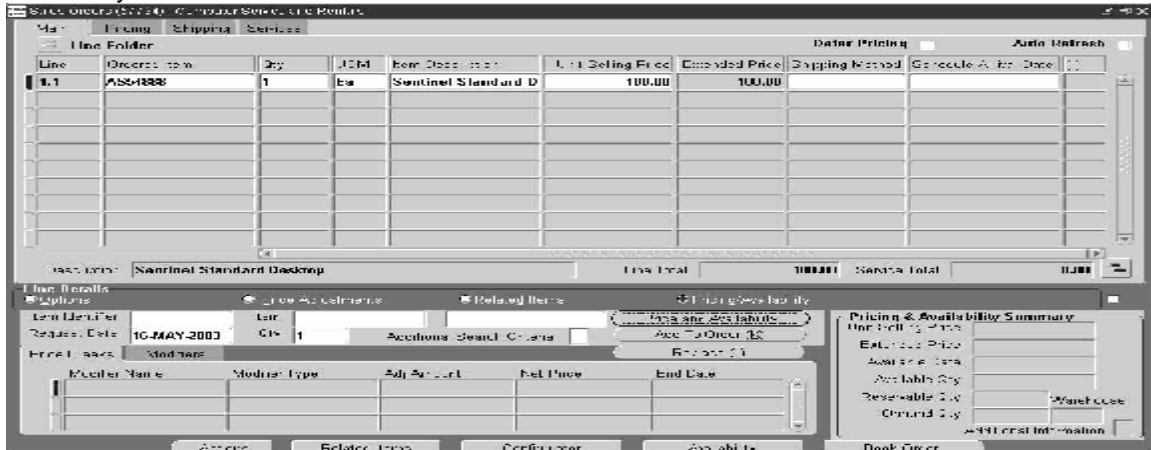
and Total, telephone Number, and E-mail.

Address Information displays

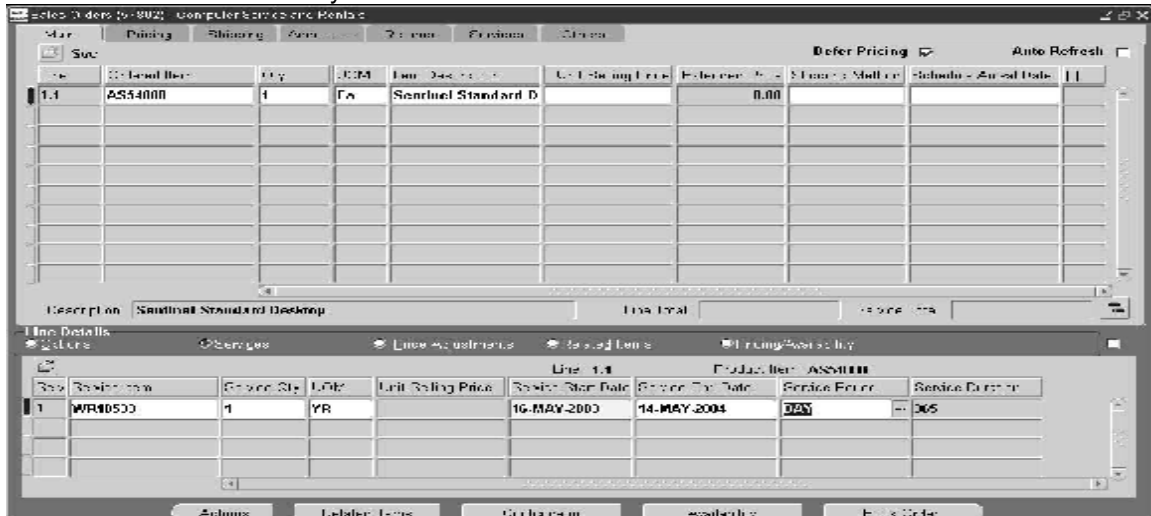
The Address Information region will have the following fields displayed by default:

- Ship To Address1, Ship To Contact, Bill To Address1, and Bill To Contact.

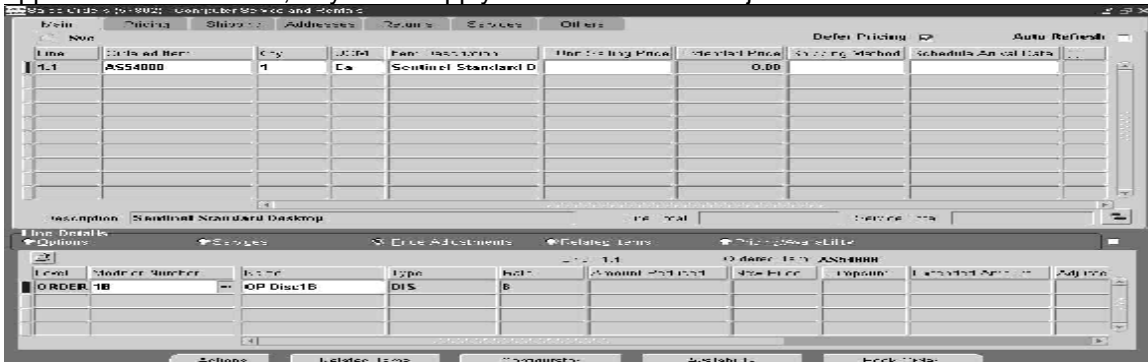
Line Details The Quick Inline Price and Availability region enables you to check for price and availability information for the current line.



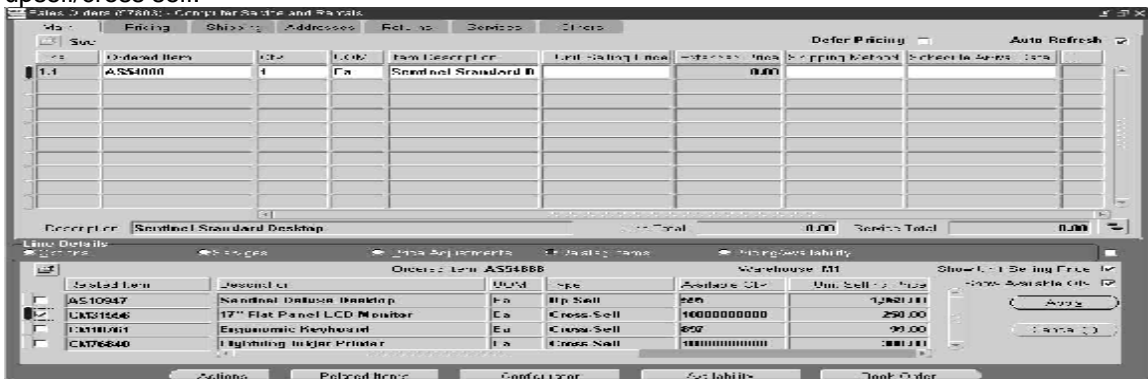
Line Details – Services Service Lines can be created by displaying the Services tabs using the folder extension functionality.



Line Details- Adjustments The Adjustments region displays the automatic adjustments that are applied to the order line, or you can apply additional manual adjustments to the order line.



Related Items In the Related Items region you can perform manual substitutions, and upsell/cross sell.

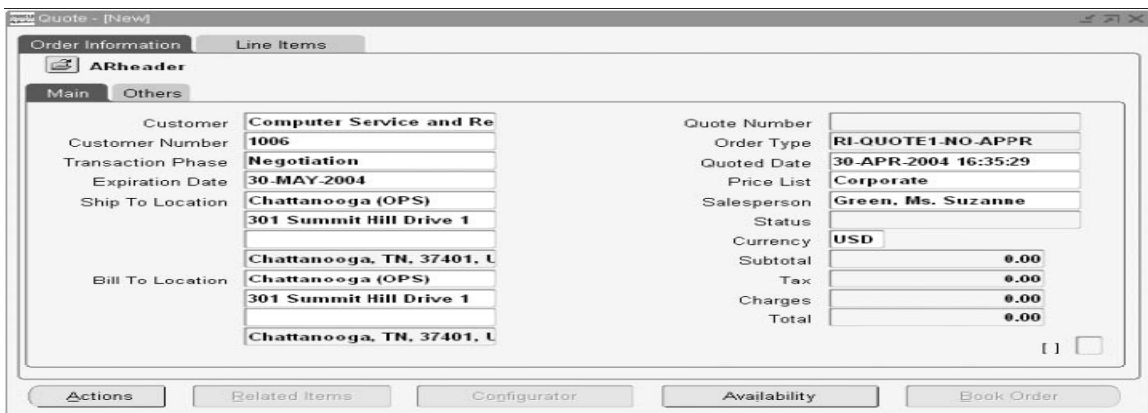


Sales Quote Overview

A quote encompasses many stages before becoming a sales order or Blanket Sales Agreement. These stages can include a draft, customer negotiations, internal and external business approvals.

- Create, modify, and select quotes
- Manually adjust quote prices
- Up Sell, Cross Sell
- Assign sales credits
- Configure complex products
- Perform real time global availability checks
- Calculate taxes
- Convert quotes to sales orders

Quotes can be entered using the existing Quick Sales Orders or standard Sales Orders window by displaying the quote specific attributes using folder functionality. Navigate to the Negotiation menu-> Select the Quote Menu option



Blanket Sales Agreements

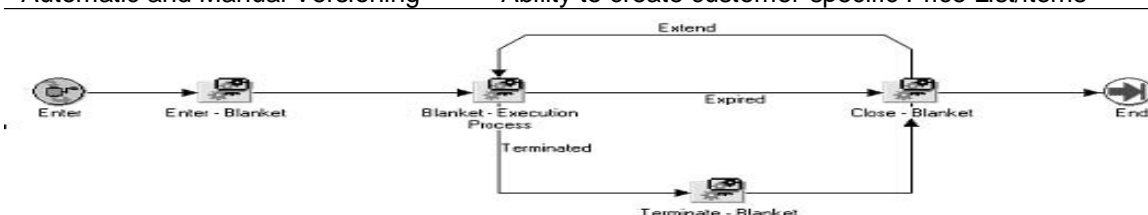
A Blanket Sales Agreement is defined as an agreement for a customer that has specific characteristics between a customer and a supplier. This is very similar to Buying an agreement for leasing cars say Hertz (from Oracle) & then any Oracle employee may rent/lease hertz car using oracle-Hertz agreement, any usage will be governed & tracked by this master contract. Blanket Sales includes the date range of the agreement, the items included, the price of the items, the quantity of each item that the parties committed to as well as other attributes, like freight or payment terms. Once a Blanket Sales Agreement is entered for a customer, multiple releases (shipments) against the Blanket Sales Agreement can be processed over a period of time within Order Management.

Navigate to Orders, Returns > Blanket Sales Agreement

Create Price List

BSA life cycle/features:

- Draft
- Internal Approval
- Customer Acceptance
- Terminate
- Expire
- Lost
- Close
- Direct access to Oracle Sales Contracts
- Automatic and Manual Versioning
- Ability to create customer-specific Price List/items



To enter a release (shipment) against a Blanket Sales Agreement:

1. Navigate to the Sales Orders window, or you can use the Create Releases button from BSA

The screenshot shows the 'Sales Orders - [New]' window with the 'Blanket' tab selected. The 'Order Information' section is active, displaying the following details:

Customer	Computer Service and ...	Order Number	
Customer Number	1006	Order Type	Order Only
Customer PO		Date Ordered	05-MAY-2003 12:45:42
Customer Contact	Brown, Gerry Mr.	Price List	Corporate
Ship To Location	Chattanooga (OPS)	Salesperson	Green, Ms. Suzanne
	301 Summit Hill Drive	Currency	USD
Blanket Number	5	Subtotal	0.00
Bill To Location	Chattanooga (OPS)	Tax	0.00
	301 Summit Hill Drive	Charges	0.00
	Chattanooga, TN, 37401, L	Total	0.00

At the bottom of the window, there are buttons for 'Actions', 'Related Items', 'Configurator', 'Availability', and 'Book Order'.

Enter the blanket number & complete reminder of Order information. Enter the Ordered Item, Quantity, and assign the line to appropriate Blanket and Blanket Line Number. If the release is valid, the quantity is consumed from the blanket line, system will disallow the order processing. Book & ship the order, fulfill the agreement. The system will update the total fulfilled quantity/amount on the Blanket Sales Agreement line once the workflow has progressed through the Fulfilled step. ie one more Oracle employee availed car hire in previous example.

view releases for existing Blanket Sales Agreements:

1. Navigate to the Blanket Sales Agreement window
Orders, Returns > Blanket Sales Agreement

The screenshot shows the 'Blankets Summary' window with two tabs: 'Summary' and 'Lines'. The 'Summary' tab is active, displaying a table of blanket agreements:

Blanket Number	Revision Number	Customer	Blanket Agreement Type	Ship to Locatio
5	0	Computer Sen	Test	Chattanooga
6	0	Computer Sen	Test	Chattanooga
7	0	Computer Sen	Test	Chattanooga
8	0	Computer Sen	Test	Chattanooga
9	0	Computer Sen	Test	Chattanooga
10	0	Computer Sen	Test	Chattanooga

The 'Lines' tab is also visible, showing a detailed view of the lines for each blanket agreement:

Blanket Number	Line Number	Revision Number	Item Context	Item	UOM
5	1	0	Internal Item Num	OM-PTO-Class	Ea
5	2	0	Internal Item Num	WSH-Lot	Ea
6	1	0	Internal Item Num	AS54888	Ea
8	1	0	All Items		
10	2	0	Internal Item Num	OM-FTE-STANI	Ea
10	3	0	Internal Item Num	AS54888	Ea
13	1	0	Internal Item Num	OM-PTO-Class	Ea
14	1	0	Internal Item Num	OM-Standard-I	Ea
16	1	0	Customer Item Nun	Cust_Kit	Ea
16	2	0	Internal Item Num	OM-Standard-I	DZ

Preview and Print Sales Documents

Preview and Print is an action available on each business document (Sales Order, Release Order, Quote, or Blanket Sales Agreement) that displays the viewable and printable PDF document. This feature uses XML publisher to create/format & finally print your documents in pdf format.

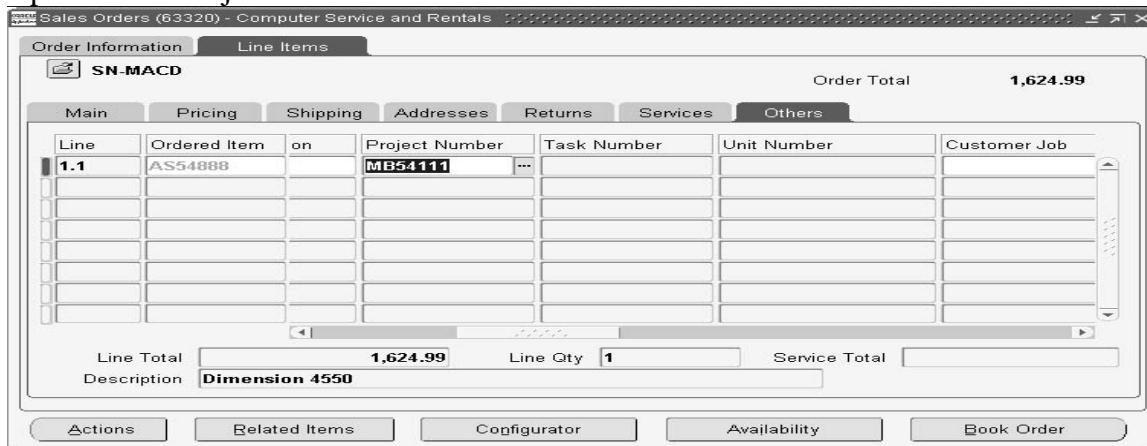
Project Task Changes for Booked Orders Overview

Oracle Project Manufacturing functionality allows an organization to plan, schedule, process and cost material and labor against a specific customer contract. Project Manufacturing as a process touches most of the products in the Oracle e-Business suite including Oracle Order Management. Oracle Order Management captures Project/Task information on the sales order lines, shipments, and options, both online using the Sales Orders window and in batch mode using the Order Import concurrent program. It also captures End Item Unit Number for Model/Unit Effectivity for controlled items

Find Order based on Project Task



Update Task/Project information on Order



Override Item Description on Order Line

You can enter or change the User Item Description on the Sales Orders window, to one that matches the purchase order. This description is different from the one that is defined in Oracle Inventory, and pertains to an individual sales order line.



Related Items and Manual Substitutions

The intent of the new Related Items and Manual Substitutions window is to increase sales and prevent lost sales due to out of stock situations. This feature in Order Management enables the user to perform functions such as:

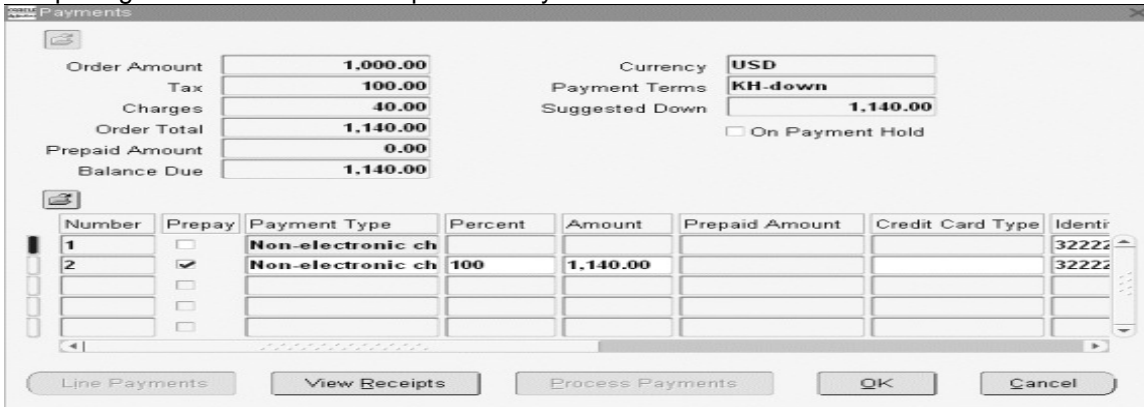
- Up-selling - Allows the user to suggest a better item to a customer who is placing an order.
- Manual Substitution - Substitution is the capability to suggest equivalent items.
- Supersession - This occurs when a product is replaced (superseded) by another product.
- Cross-selling - Allows the user to suggest additional items to a customer who is placing an order.

Enter the Quantity on Order line. The Related Items window opens if the profile option OM: Open Related Items Window is set to Yes



Multiple and Partial Payments

Multiple Payments enhances the payment options for orders, replacing the single payment type option at the order header (with the exception of Commitments) for example, cash, check, credit card, or null (means invoice) for a single order. To use this feature go to order header after completing the order header and open the Payments window.



Catch Weights for Discrete Inventory

Using Catch Weight support you can specify a secondary quantity and secondary UOM at shipping and then reprice and invoice the order based on that quantity. Very useful for consumer goods industry eg you ship flowers as wholesale agent of the city & each box of roses weight 10lb but the 2 boxes you are shipping are 13lb & 11lb you actually shipped 24 lbs. The price list set up is \$5 per pound:

The final price for flowers is: \$5 per pound * (20lb/2Ea) * (24lb/20lb) = \$60/Ea. This amount will be sent to invoicing. If there is also a volume discount of: 5% from 10-20 lb, 10% from 21-30lb, The adjustment amount will be: \$5/lb. *5% *(20lb/2Ea) *(24lb/20lb) = \$3/Ea. This amount will be sent to invoicing if discount details is needed. The final selling price will be \$60/Ea. - \$3/Ea. = \$57/Ea.

Integration with Transportation for Freight Rating

- The ability to assess freight charges at order entry based on actual carrier rates, either the shipper rates and shipment preferences or customer shipment preferences.
- The ability to include specific carrier accessories as part of freight charge estimate at order entry.
- Streamline and simplify the setup and entry of freight charges.

Using Freight Rating you can:

- Provide more accurate freight estimates at order entry
- Improve customer service by providing more accurate estimates



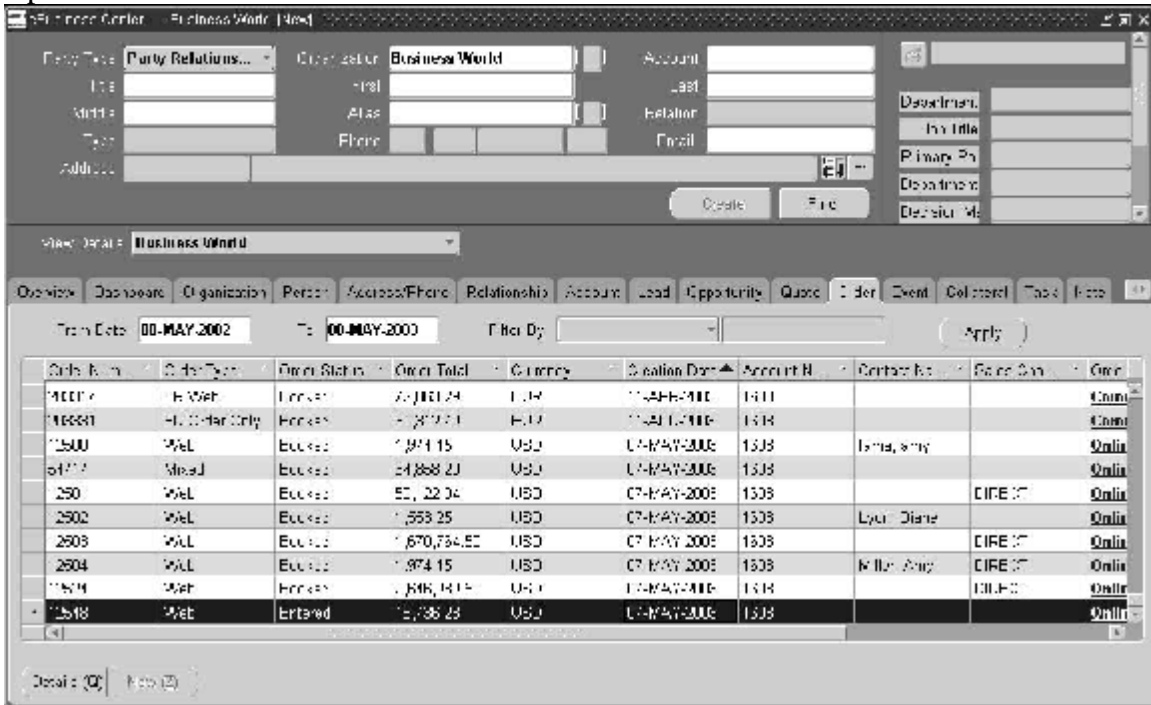
Gross Margin Display

Gross Margin is most commonly calculated by dividing the difference of the selling price and the cost by the selling price (or by unit cost). This functionality calculates what the gross margin of an order line and an order itself is, and also to take action on orders based on business rules that use Gross Margin.



create/View sales order in TeleSales using the Order tab

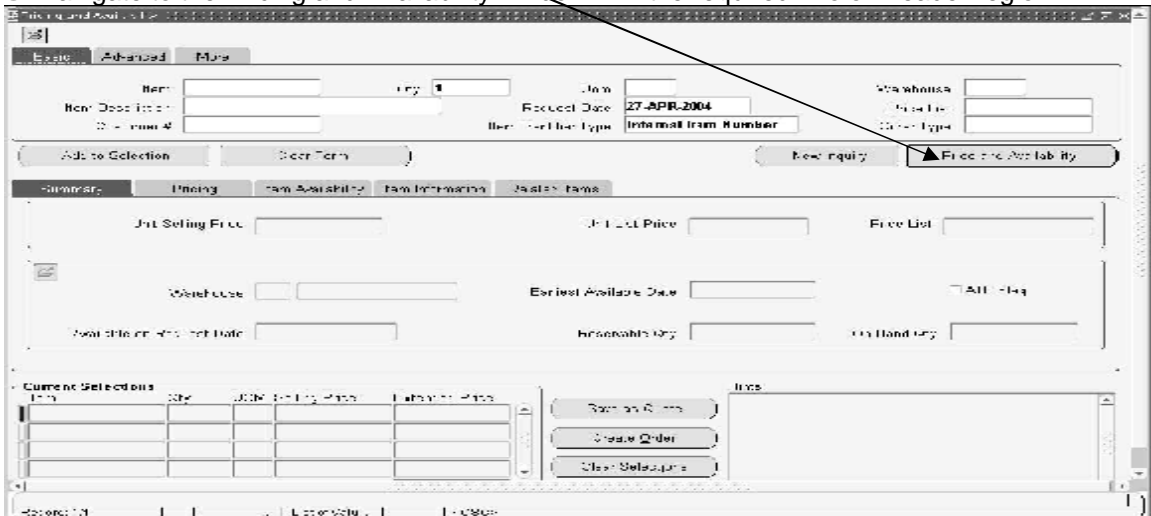
Open eBusiness center -> Order Tab



Pricing and Availability using OM

While booking an order two questions are of most importance how much would is cost & do we have it in stock. Pricing and Availably function within Order Management enables you to:

- Perform price and availability checking without creating an order.
 - Perform price and availability checking without placing demand or reservations.
 - Easily create an order or quote if the query results in a customer's decision to buy the item.
 - View both the Selling Price and List Price of a product, price breaks, other automatic discounts, and Surcharges as well as other benefits not affecting the selling price currently available
- à Navigate to the Pricing and Availability window fillin the required info on header region



Review your information. When the customer agrees, click Add To Order.

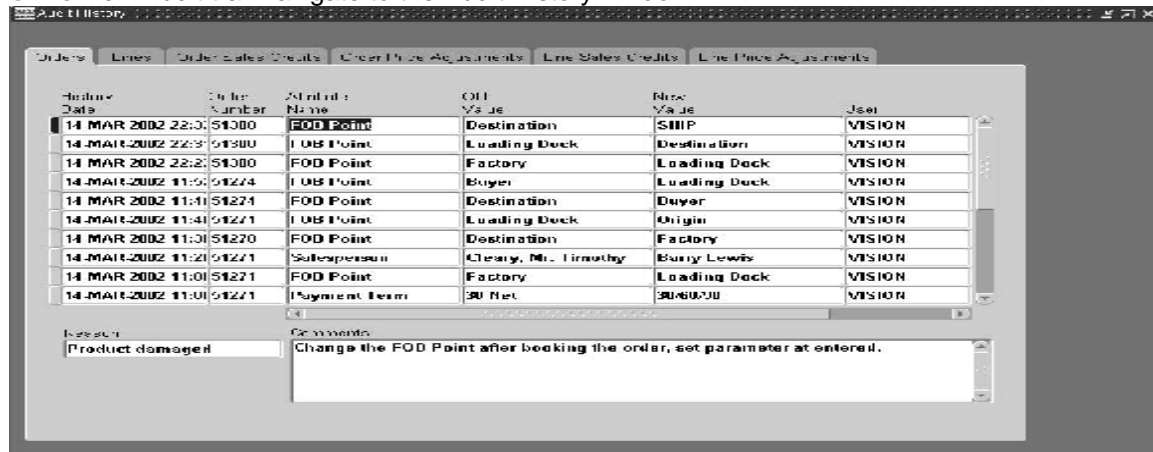
if exact match for the required item is not found -> Select the Related Items tab in the results section to view Related Items. If the customer wants a related item, select the check box on the lines displaying the pertinent related item -> If the customer wants an order, click Add To Order.

Order Audit Trail

Oracle Order Management enables you to record, or track updates to specified order attributes as they occur, to a given constrained order attribute based on the following entities:

- Attribute Values
- Workflow activities
- The Oracle Responsibility initiating the update.

à To view Audit trail navigate to the Audit History window.



The screenshot shows the Oracle Audit History window with a table of audit trail entries. The table has columns for Audit Date, Order Number, Attribute Name, Old Value, New Value, and User. Below the table is a comments section with a text area containing the text: "Change the FOD Point after booking the order, set parameter at entered."

Audit Date	Order Number	Attribute Name	Old Value	New Value	User
14 MAR 2002 22:30	51200	FOD Point	Destination	SHIP	VISION
14 MAR 2002 22:30	51200	FOD Point	Loading Deck	Destination	VISION
14 MAR 2002 22:30	51200	FOD Point	Factory	Loading Deck	VISION
14 MAR 2002 11:50	51274	FOD Point	Buyer	Loading Deck	VISION
14 MAR 2002 11:41	51271	FOD Point	Destination	Buyer	VISION
14 MAR 2002 11:41	51271	FOD Point	Loading Deck	Origin	VISION
14 MAR 2002 11:30	51270	FOD Point	Destination	Factory	VISION
14 MAR 2002 11:20	51271	Salesperson	Creary, Mr. Timothy	Bury Lewis	VISION
14 MAR 2002 11:01	51271	FOD Point	Factory	Loading Deck	VISION
14 MAR 2002 11:01	51271	Payment Term	30 Net	30/60/90	VISION

Drop Shipments

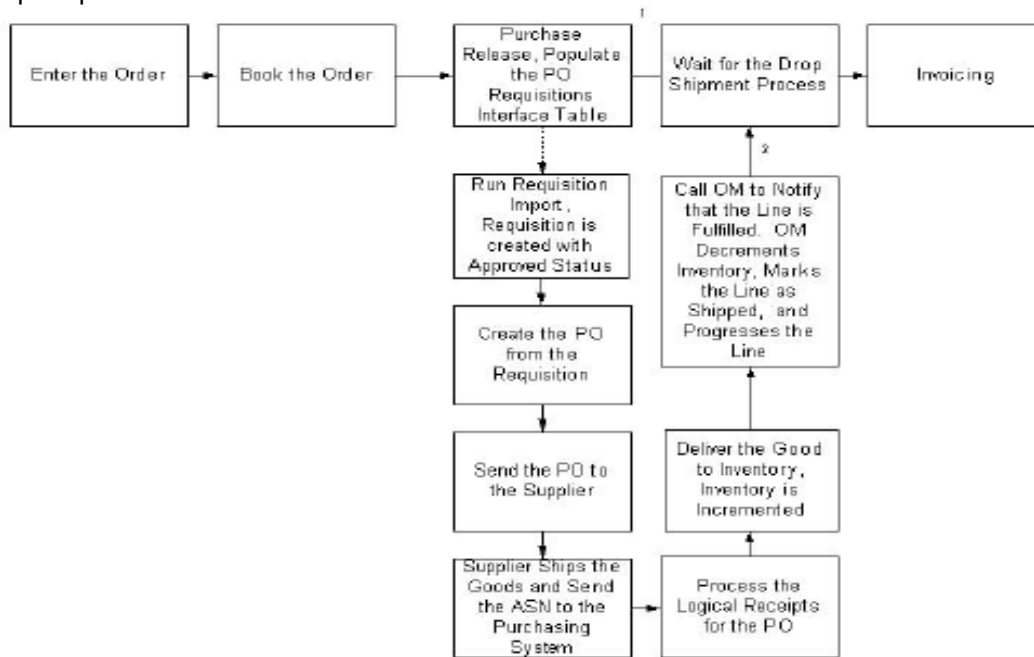
Drop shipping functionality enables you to take an order from your customer and fulfill it directly from your supplier's site. The benefits of drop shipping include:

- No inventory is required
- Reduced flow times
- Elimination of packing and shipping costs
- Reduced shipping time to your customer
- Reduced order fulfillment processing costs
- Elimination of losses on non-sellable goods
- Reduced inventory space requirements

Steps for Drop Shipments

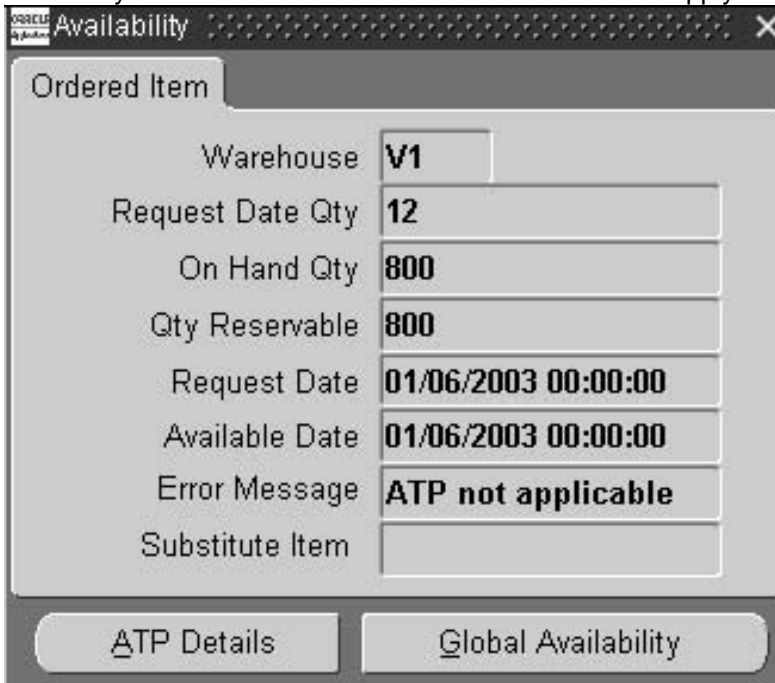
1. Navigate to the Sales Orders window.
2. Enter a sales order and an order line with an item sourced externally with a quantity .
3. Use a warehouse that is in a different set of books.
4. Book the order.
5. Purchase Release runs automatically, if the purchase release is deferred, then run the workflow background process for WF Item Type Order Management Line (OEOL).
6. Run Requisition Import (the requisition is created and approved).
7. Create the purchase order in Purchasing. Verify the sales order information on Drop Ship tab of the Shipments block.
8. Approve and print the purchase order. Verify the additional sales order information for the shipments.
9. Send the purchase order to the supplier.
10. Logically receive and deliver the purchase order.
11. Verify that the sales order Lines shipped quantity is set properly.

Drop Shipment Process



Available to Promise(ATP)

You can determine availability for an order line or availability of a group of lines using the Availability button within the Sales Orders Header or Lines window. This window can provide availability of ordered OR substitute item from advance supply chain module.



Reservations

Reservations provides a variety of reservation strategies, enabling users to reserve from onhand quantities using intelligent queries, reserved items are not locked & to keep control of available to order quantities. When low inventory occurs near the time of pick release, you could use either Fair Share or Percentage reservations mode to fulfill higher priority customer needs while supply is not guaranteed in any of the modes (until time of pick release) but customers are given priority for their order at times when inventory is very low to satisfy every customer. To reserve an item Perform an intelligent query. Query by item or customer on concurrent manager, Select a reservation mode, if desired (Fair Share, Percentage, or Partial) & if happy with the reservation commit your reservation, to Allocate inventory to a specific order line from a warehouse, subinventory, lot, or revision

Sales Order Scheduling

Scheduling is a communications tool that helps balance customer demands with your ability to fulfill that demand. Provides a schedule date and warehouse that will fulfill the customers request. If an item has Check ATP enabled, then the supply will be consumed from the pool of available supply for that item. If an item does not have Check ATP enabled, then the supply will not be consumed. schedule order lines with multiple ship to locations, shipping warehouses, request dates, promise dates, schedule dates, and inventory details. With ship sets, you can specify which lines on an order must be shipped together. To manually schedule an order

1. Navigate to the Sales Orders window, Enter item information.
2. After entering the item. qty, and UOM, use the right-mouse click to schedule.
3. Schedule an entire order, configuration or a set of lines using the multi-select capability of the Sales Orders window.

Autoschedule from the Tools Menu Auto Schedule check box Autoschedule through profile option value setting Autoschedule through use of order types to autoschedule

Find Orders

Order Information | Line Information | Advanced | Holds Information | Scheduling

Internal Item: AS54888
Order Number:
Customer:
Ship To:
Demand Class:
On Hold:
Shipment Priority:
Request Date:
Promise Date:
Schedule Ship Date:
Warehouse:
Order Type:
Customer Number:
Schedule Status: Unreserved
Reserve Status: Unreserved
Pick Status: Unpicked
Order Status:
To:
To:
To:
Clear | New Order | Find

Find matching order & schedule the orders you need on scheduling organizer window below.

Scheduling Organizer

Internal Item	Customer	Request Date	Qty	UOM	Schedule Ship Date	Whse	Qty Reserved
AS54888	Modern Truck	24-MAR-2003 0	1	Ea	24-MAR-2003 23:59:59	D1	1
AS54888	Modern Truck	14-MAR-2003 1	10	Ea			
AS54888	Modern Truck	10-MAR-2003 1	1	Ea		D1	
AS54888	Modern Truck	03-FEB-2003 16	1	Ea		D1	
AS54888	Modern Truck	31-JAN-2003 17	1	Ea		D1	
AS54888	Modern Truck	15-JAN-2003 10	30	Ea		D1	
AS54888	Modern Truck	11-JAN-2003 11	44444	Ea		D1	
AS54888	Modern Truck	08-JAN-2003 11	1	Ea		D1	
AS54888	Computer Service	06-JAN-2003 10	1	Ea	06-JAN-2003 10:52:19	M1	1
AS54888	Modern Truck	06-JAN-2003 10	10	Ea	06-JAN-2003 10:48:20	D1	0
AS54888	Computer Service	27-MAR-2003 0	2	Ea	27-MAR-2003 23:59:59	V1	2
AS54888	Computer Service	27-MAR-2003 0	5	Ea	27-MAR-2003 23:59:59	V1	5
AS54888	Imaging Innovati	27-MAR-2003 0	2	DZ			
AS54888	Imaging Innovati	27-MAR-2003 0	1	DZ			

Actions | Split | Availability | Reserve | Schedule

Order Management enables you to unschedule orders or lines to meet customer demands when inventory is very low & customer orders needs to be completed asap.

Fulfillment Sets

A Fulfillment set is a group of sales order lines with common attributes which must be fulfilled together this ensures that orders in fulfillment set are invoiced together making it easier to manage orders. This is done using seeded workflow & defining by fulfillment methods to model unique business processes.

Ship set & Arrival sets

Many businesses do not wish to create multiple shipments for a single order. Ship Sets enable you to group order lines within a set for shipment. OM: Assign new set for each line can control if an order can be shipped in multiple consignment or not allowing tighter control of shipment. Arrival sets ensure all order lines within the set definition are scheduled to arrive at a customer site on the same date regardless of shipping method and ship to location.

Overview of returns

Using the Sales Orders window, you can enter, view, and update return material authorizations (RMAs) for your customers to return goods to you. Returns can be authorized for replacement that returns with or without credit, when credit can be given to customer, before or after inspection of returned items has occurred. Returns from a customer occur for a variety of reasons including damage, shipment error, or sampling. Return material processing functionality enables you to manage customer expectations while controlling inventory receipts and customer credit processing. To create a simple RMA based on serial number of returned item, navigate to the Sales Orders window, place your cursor on the return line, and click Actions. Select the Return Lot/Serial Number option.

Quantity	Lot	From	To

Sales Order Cancellation

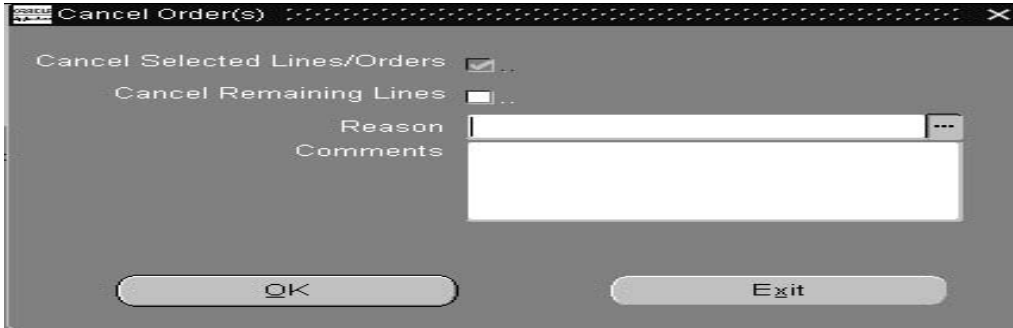
You can cancel previously booked sales orders, returns, internal orders, and service orders, You can cancel entire orders or returns, or individual lines using simple constraints defined within order management to control order cancellation process. You can cancel

- An entire line
- A partial line quantity
- A complete order or return, provided all lines are cancellable
- Internal orders
- Service orders
- Drop shipments

You can define processing constraints for cancellations. Depending on how you set up constraints, the system may or may not allow cancellations. Cancellation can be controlled through the responsibility users logs into thus allowing only a part of your department to cancel previously booked orders. You may define workflows which can be initiated by any users & only admin users can then cancel the order system automatically adjusts reservations for cancelled lines.

1 Navigate to the Order Organizer window and query the order (move to the Line Items tabbed region, and select a line or multi-select the lines to cancel if you want to cancel few lines not the entire order)

2 Click Actions & select cancel



Holding an Order

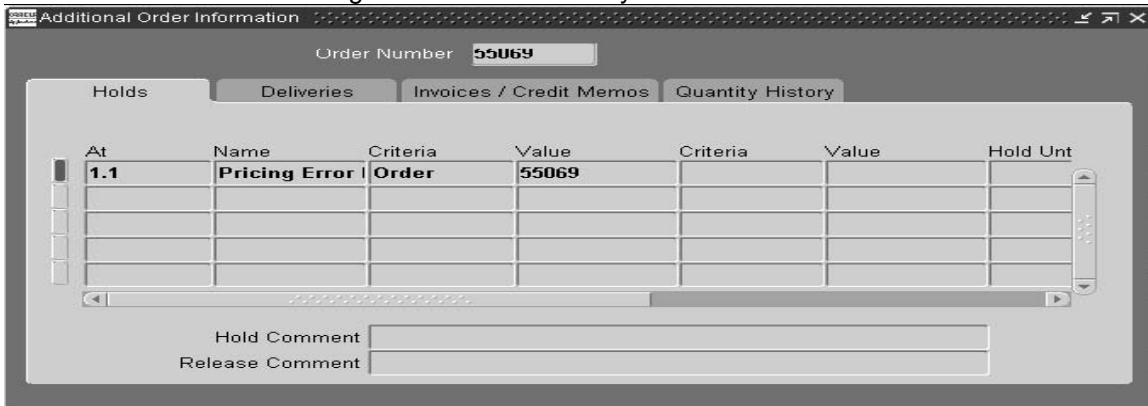
Order Management enables you to hold an order, return, order line, or return line from continuing to progress through its workflow by utilizing the holds feature. Holds can be applied manually or automatically based on a set of criteria you define, such as a credit check hold. You can define as many holds to suit your business needs few of the vanilla hold types are Credit hold, Activity specific holds, tracking & viewing holds, general service administration violation hold



1. To apply hold to an order Navigate to the Sales Orders window and query the order or return you want to view.

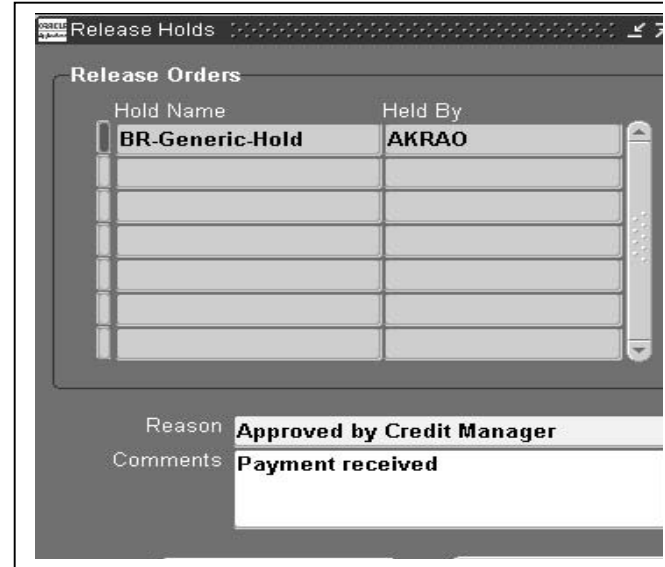
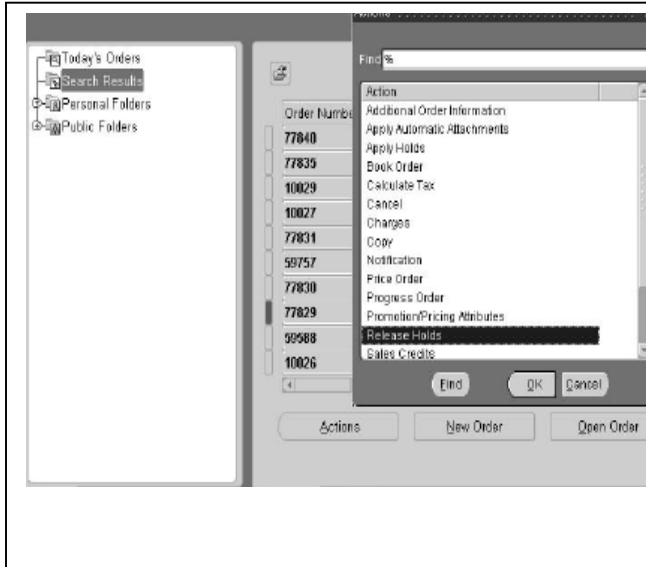
2. Click Actions and select Additional Order Information.

3. Select the Holds tabbed region to view hold history information.



Releasing hold -> release holds on orders, returns and lines and release hold sources either manually as process outlined below or automatically.

1. Navigate to the Order Organizer window.
2. Query order lines that have the specific hold applied.
3. Go to Actions > Release Holds to release this hold



Order Pricing

Order management allows you to price order lines either on-line as you enter them or in batch mode and you can automatically apply discounts. In addition, you can override prices and discounts in each sales order & offer discounts from a single source rather than working with products from multiple vendors.

- Give the following standard discounts:
 - Apply a surcharge.
 - Apply discounts by percentage, lump sum or amount.
 - Substitute a new price.
- Calculate the price of order lines using list prices specified in price lists and pricing formulas.
- Price a service item at a percentage of the serviceable item.
- Price the entire order.
- Enter negative prices.
- Adjust prices either automatically or manually using discounts.
- Override standard discounts and prices and document the reason.
- Choose the lowest discount/ Freeze the price.
- Apply only certain types of adjustments, for example, freight charges, to a line.
- Calculate freight charges and show it as a separate component in OrderManagement.
- Apply price modifiers that you define.
- Calculate prices as of a specific date.

Price lists are essential to ordering products because each item entered on an order must have a price..You can define the following types of prices on price lists:

- Unit price: A fixed price.
- Percent Price: A price (only for a service item) which is a percent of the price of another item.
- Formula: Multiple pricing entities and constant values related by arithmetic operators.(Formula window)

Basic information includes the price list name, effective dates, currency, pricing controls, rounding factor, and defaulting sources such as payment terms, freight terms, and freight carrier.

Creating Price List (you can also copy a price list to create a new price list from a template price list that contains basic pricing information of your organization,adjust a price list after creation)

The screenshot shows the 'Price Lists' application window. The 'Main' tab is active, displaying the configuration for a price list named 'Corporate'. The 'Description' is 'Corporate Price List'. The 'Currency' is 'USD'. The 'Effective Dates' are '01-JAN-2002'. The 'Payment Terms' are '30 Net'. The 'Freight Terms' are 'Prepay & Add'. The 'Round To' is '-15'. The 'List Lines' tab is also visible, showing a table of items.

Product Context	Product Attribute	Product Value	Product Description	
Item	Item Number	#82000	Consulting/Training	U
Item	Item Number	CM31556	Monitor - 19" Flat	E
Item	Item Number	CM28287	Optiball Wireless Mouse	E
Item	Item Number	CM18759	Keyboard - 101 Key	E
Item	Item Number	CM42047	Power Cord	E

Adding items to price list

The screenshot shows the 'Add Items to Price List' application window. The 'Price List' is 'Corporate'. The 'Items' are '1'. The 'Item Category Set' is 'Inv.Items'. The 'Item Category' is 'Consulting Services'. The 'Item Status' is 'Active'. The 'Set List Price Equal to Cost From' checkbox is checked. The 'Inventory Organization' is 'Vision Operations'. The 'Request ID' field is empty. The 'Submit' button is visible.

Pricing Modifiers

Modifiers enable you to setup price adjustments (for example, discounts and surcharges) and freight and special charges that the pricing engine applies to pricing requests. Using modifiers, you can:

- Set up modifier lines for a modifier list to define the price adjustment details.
- Create eligibility rules for modifiers by assigning modifier list and line level qualifiers.

Using modifier lists, you can create groupings of price adjustments and freight and special charges that you offer and report together to meet various business needs

Modifier list level qualifiers help the pricing engine to determine who is eligible for the modifier lines. If an order is not eligible for a modifier list, it is not eligible for that list's line level modifiers even if the lines have qualifiers for which the order is eligible.

The screenshot shows the 'Define Modifier' application window. The 'Main' tab is active, displaying the configuration for a modifier list named 'Net-Acc-PBH'. The 'Type' is 'Discount List'. The 'Number' is 'Net-Acc-PBH'. The 'Currency' is 'USD'. The 'Start Date' is empty. The 'Active' checkbox is checked. The 'List Qualifiers' button is visible.

The 'Modifiers Summary' tab is also visible, showing a table of modifier lines.

Modifier No	Level	Modifier Type	Adjustment Type	Accumulation Attribute	Net Amount	
72766	Line	Discount				
80569	Line	Price Break He	Discount	Item Amount		

The **Pricing Engine Request Viewer window** displays detailed information about the price list lines and modifier lines that the pricing engine applied or rejected.



Use **Pricing agreements** with your customers to define the prices, payment terms and freight terms that you negotiated in the agreement. When pricing, the pricing engine ignores qualifiers attached to a price list associated with an agreement if the agreement is chosen at the time of order entry. Pricing agreement can be revised as & when needed.



Pricing an Order

1. Enter order header details -> Enter price list
 2. In the Line Items tab, enter order line information. eg ordered Item, Qty (quantity), and UOM, and the list price is displayed.
 3. Select the Pricing tab to display the Price List, Unit Selling Price, Extended Price, Pricing Quantity, and Pricing UOM. The Extended Price is automatically calculated when the Selling Price is updated, and the Pricing date defaults according to your defaulting setup.
 4. Select the Calculate Price Flag
 - 5 Enter the pricing attributes for the line.
 - 6 Navigate to the Promotions/Pricing Attributes window, Pricing Attributes tab & select pricing context -> Click Apply. After the order lines are entered: click Actions > Price Order.
- You can override/re-price the price calculated for the item after order has been priced using steps above

Standard Reports

Commitment Balance Report Use this report to review summary information for your customer commitments. Oracle Receivables automatically prints all invoices and credit memos against the initial commitment, and displays the remaining balance of the commitment.

Comprehensive Order Detail Report The Comprehensive Order Detail Report reviews comprehensive details of all orders. This report provides a detailed, comprehensive listing of information about each order, including sales credits, price adjustments, shipping, cancellation and schedule details.

Order/Invoice Detail Report The Order/Invoice Detail Report reviews detailed invoice information for orders that have invoiced.

Orders by Item Report This report provides a listing of each item, customer name and number, order number, purchase order number, order date, ordered quantity, shipped quantity, and quantity outstanding, and subtotals for each item and customer.

Sales Order Acknowledgement The Sales Order Acknowledgement communicates to your customers the items, prices, delivery dates, service, and installation details for orders they place with you.

Credit Order Detail Report The Credit Orders Detail Report displays returned lines for a specific credit order type, credit order line type, specific item, date range, order number, and salesperson.

Credit Order Discrepancy Report The Credit Order Discrepancy Report is used to review discrepancies between RMA lot and serial numbers returned by the customer and lot and serial numbers on the rma return order.

Credit Order Summary Report The Credit Orders Summary Report displays all return lines in an order. This report can be used to provide comprehensive order details for return order lines received from customers.

Credit Limit Usages Report The Credit Limit Usages Report enables you to review credit information by credit profile types.

Credit Exposure Report The Credit Exposure report can be used to analyze your customers total credit exposure.

Orders/Lines On Credit Check Hold Report The Orders On Credit Check Hold Report identifies all of the credit holds currently outstanding for a customer within a date range, or identify why a particular order is on hold.

Payment Receipt This document can be used as a payment receipt when funds are collected along with the order. It can be called from a workflow, so it can be placed in the order flow to print automatically.

Outstanding Holds Report The Outstanding Holds Report reviews order holds for the customer or customers you select. This report displays the order number, order date, ordered items, and order amount for each order line on hold for each customer you select. It is automatically sorted by customer, order number, order line, and then order line detail.

Sales Order and Purchase Order Discrepancy Report The Sales Order and Purchase Order Discrepancy Report displays differences between the sales orders and purchase orders for a drop shipment

Internal Order and Purchasing Requisition Discrepancy Report The Internal Order and Purchasing Requisition Discrepancy Report displays the differences between the purchasing requisition entered and the actual items ordered during order entry. This report includes all open and closed orders, order numbers, order date ranges, order types, requisition numbers, items, ship to information, scheduled dates, and internal requisition and internal sales order hold discrepancies.

Order Discount Summary/Detail Report The Order Discount Detail/summary Reports review discounts applied to orders by order line detail. This report provides detailed line pricing information, including price list price, selling price, and discount information.

Unbooked Orders Report The Unbooked Orders Report reviews orders you have entered but not booked.

Cancelled Orders Report The Cancelled Orders Report reviews all orders that have been cancelled. This report provides a summary of each cancelled order, including order number, customer name, line number and item, the date and reason the order or order line was cancelled, the quantity ordered and the quantity cancelled, and who cancelled the order.

Returns by Reason Report The Returns by Reason Report reviews all return material authorizations for various return reasons.

Cancelled Orders Reasons Detail Report The Cancelled Orders Reasons Detail Report displays the reasons for the cancelled lines and who entered the cancellation.

Orders Summary Report The Orders Summary Report provides a one-line order summary by currency and order type. The report enables you to quickly summarize orders by entities such as customer or salesperson.

Order/Invoice Summary Report The Order/Invoice Summary Report reviews summary invoice information about orders that have invoiced, including ordered amount, invoiced amount, adjusted receivables, and balance due.

Salesperson Order Summary Report The Salesperson Order Summary Report reviews orders for one or more salespeople. This report displays the order and each order line associated with each salesperson.

Setup Considerations(mandatory & optional steps)

Step 1: Flex fields Define key and descriptive flexfields to capture additional information about orders and transactions.

Step 2: Multiple Organizations Define multiple organizations in Oracle Inventory.

Step 3: Inventory Organizations Define inventory organizations (warehouses), parameters, subinventories, and picking rules in Oracle Inventory.

Step 4: Profile Options Define profile options to specify certain implementation parameters, processing options, and system options.

Step 5: Parameters Set your Order Management System Parameters to validate items, enable customer relationships, and operating unit defaults.

Step 6: Invoicing Define invoicing information, including payment terms, invoicing and accounting rules, Autoaccounting parameters, territories, and invoice sources.

Step 7: Salespersons Define information on your sales representatives.

Step 8: Tax Define tax features, such as codes, rates, exceptions, and exemptions.

Step 9: QuickCodes Define QuickCodes that provide custom values for many lists of values throughout Order Management.

Step 10: Workflow Define header and line processing flows to meet different header and line type requirements.

Step 11: Document Sequences (Order Numbering) Define Document Sequences for automatic or manual numbering of orders.

Step 12: Order Import Sources Define sources for importing orders into Order Management.

Step 13: Units of Measure Define the units of measure in which you supply items.

Step 14: Item Information Define item information, including item attribute controls, categories, and statuses.

Step 15: Items Define the items that you sell, as well as container items.

Step 16: Configurations Define the configurations that you sell.

Step 17: Pricing price lists for each combination of item and unit of measure that you sell

Step 18: Customer Classes Define customer profile classes. This step is required if you plan on using the functionality surrounding CustomerProfiles. Several defaulting values are provided.

Step 19: Customers Define information on your customers.

Step 20: Item Cross References Define item cross references for ordering by customer part number, UPC, or any generic item number.

Step 21: Sourcing Define your sourcing rules for scheduling supply chain ATP functions.

Step 22: Order Management Transaction Types (Sales Documents) Define Order Management transaction types to classify sales documents. For each order type, you can assign a default price list, defaulting rules, order lines, return lines, line types, workflow assignments, payment terms, and freight terms.

Step 23: Cost of Goods Sold (COGS) Set up your Cost of Goods Sold Accounting Flexfield combination (COGS Account) in Oracle Inventory

Step 24: Processing Constraints Define processing constraints to prevent users from adding, updating, deleting, splitting lines, and cancelling sales documents information beyond certain points in your business flows. Use the constraints Order Management provides, which prevent data integrity violations, or create your own.

Step 25: Defaulting Rules Define defaulting rules to determine the source and prioritization for defaulting order information to reduce the amount of information you must enter manually in the Sales Orders window.

Step 26: Credit Checking Define your credit checking rules. This step is required if you plan on performing any type of order credit checking.

Step 27: Holds Define automatic holds to apply to orders and returns. This step is required if you plan on performing automatic hold for orders or returns.

Step 28: Attachments Define standard documents to attach automatically to sales documents.

Step 29: Freight Charges and Carriers Define freight charges and freight carriers to specify on orders.

Step 30: Shipping Define shipping parameters in Oracle Shipping Execution.

Order Management Data Model

The Sales Order is modeled as a business object comprised of the following entities:

- Header Level
 - Order Header
 - Header Sales Credits
 - Blanket Order Header
- Line Level
 - Order Lines
 - Line Sales Credits
 - Line Pricing Attributes
 - Line Adjustment Associations
 - Blanket Order Lines
 - Line Price Adjustments
 - Line Adjustment Attributes
 - Lot Serial Numbers.

