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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.

Search Results	🖆 My Default	Folder			
Personal Folders	Order Number	Messages	Customer Name	Status	
Public Folders					
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	Actions		New Order	Open Order	_

- 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

Pricing

• Shipping

- Addresses
- Returns

Others

- Services

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

ain Others			
Customer	Computer Services and	Order Number	63472
Customer Number	1006	Order Type	Order Only
Ship To Contact	Brown, Gerry Mr.	Date Ordered	30-MAY-2003 08:47:41
Customer Contact	Brown, Gerry Mr.	Price List	Corporate
Ship To Location	Chattanooga (OPS)	Salesperson	Lewis, Mr. David
	301 Summit Hill Drive	Status	Entered
		Currency	USD
	Chattanooga, TN, 37401, L	Subtotal	0.00
Bill To Location	Chattanooga (OPS)	Tax	0.00
	301 Summit Hill Drive	Charges	0.00
		Total	0.00
	Chattanooga, TN, 37401, L		n [

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	Sales Channel	CI Corporate
		Shipping Method	
		Freight Terms	CIP
FOB	Buyer	Shipment Priority	Special Priority
pping Instructions	Delivery has to be done b	2 Packing Instructions	The packing has to be do
Tax Handling	Standard	Tax Exempt Number	
Exempt Reason		Payment Type	
Amount		Credit Card Num	
Credit Card Type		Card Expiration Date	
Card Holder		Prepaid Amount	
Approval Code		Order Source Reference	OE_ORDER_HEADERS_AL
Order Source	Online		

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

J	MC	~				Order Total	6,040.00
Main	Pricing	2 Shipp	ng Addresses	Returns Services	Othe	rs	
ne	Ordered Item	Qty	Line Type	Item Description	UOM	Unit Price	Request Date S
1.1	7157A003BA-	2	-STANDARD	IR1600 230V AMS (S2	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	1 6837A003AA	20	. (-STANDARD	DRUM IR1600/2000	EA	130.00	10.01.2005 12 1
	- <u>)</u>	[4]	1				
Line	e Total		3,440.00	Line Oty 2	Sen	rice Total	0.00
Desc	ription IR1600 2	30V AI	MS (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 itme, when is it needed?

Main	Pricing	2 Shipping	Add	resses Retu	irns Servie	ces O	thers		
Line	Ordered Item	Qty	Wareh	Subinventory	Receiving Or	Ship Set	Sched. Ship	Sch. Arrival Date	Re
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
				3		4			
Tim	Total	011	3,440.0	0 Line G	y. 2		Service Total		0.00

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 attributeson multiple orders. In the Order Organizer, multi-select the orders you want to apply changes to and choose Mass Change from the Tools menu.

vlain	Pricing	Shipping	Address	es	_	_	_	
	Customer	[(Order Number		
Cust	tomer Number					Order Type		
	Customer PO				ļ	Request Date		
Cust	tomer Contact					Price List		
Sh	ip To Location					Date Ordered		
В	ill To Location	1			Ex	piration Date		
	Order Source				Original	Doc Number		
Orig	inal Doc Type					Salesperson		
	Tax Handling				Tax Ex	empt Number		
Tax Ex	cempt Reason					Terms		
								11

- 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	Pricing	Shipping	Addresses	Returns	Services	Others	
	Line	, 🗆 🗖					
	Ordered Item	n 🗌					Ţ
	Ordering UON	1			Qt	ty Ordered	
	Line Type	ə [Customer P	'O Number	
	Salesrep	D			Original Do	oc Number	
Ori	ginal Doc Type				O	riginal Line	
	Qty Cancelled	4			Invoice	d Quantity 🗌	
C	hange Reasor	n [(Comments	
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							[]

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 orader can be compared any time using this feature.

4		2											
			Customer	Comp	uter Se	rvice and Re		0	rder N	umber		2	
			ier Number	1006					S	ubtotal	3,469.98		Addre:
			Order Type	RI-QU	OTE1-N	O-APPR				Tax	693.98		
		Da	ate Ordered						CI	harges	0.00		
		S	alesperson	Green	n, Ms. S	uzanne				Total	4,163.96		
		Main	Pricing	Sh	ipping	Addresses	Returns	Servic	es	Others			
		1											
		Line	Ordered It	tem 1	Oty	UOM	Unit Selling F	vice R	leque	st Date	Schedule Ship Da	te Sta	atus
	11	1.1	AS54888	•	1	Ea	1,73	1.99 1	2-AP	R-2004 21:06:05		Dra	aft
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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 I). 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 Address
- Bill To Customer Number
- Bill To Contact
 Deliver To Contact
 - Deliver To Contact/Customer

Bill To Customer
 Sales Channel

Internal Item

- Ship From Location/Ship To
 Ship To
- Component Number
 Customer Job

Item Revision/Type

- Customer Job
 Invoiced Ouantity
- Invoiced Quantity
- Invoicing Rule/Tax Code/Date
- 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,

- Ship To Address
- Ship To Contact/Customer Pending Amount/Prepaid Amount Deliver To Contact/Customer
 - Customer Number
 - Item Description/Identifier Type

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.

ine	Ordered tem	aty.	1014	hem Dess inter	1. 11 Beling Frice	Eccended Price	Bapping Method	Goncoule All htt. Date:	00
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Line Details - Services Service Lines can be created by displaying the Services tabs using the folder extension functionality.

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		_							
		194			" ASISSICADASASAS	ALCARCARCHIC MODELLEA	store.	1	(F)

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.

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Line	Cirls ed Her	C ~ 5	0.034	ten lassam	11	Unr Seiling Price	Mendad Price	Shaaring Marbod	Schedula An cal Esta	
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Related Items In the Related Items region you can perform manual substitutions, and upsell/cross sell.

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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

ain Others			
Customer	Computer Service and Re	Quote Number	
Customer Number	1006	Order Type	RI-QUOTE1-NO-APPR
Transaction Phase	Negotiation	Quoted Date	30-APR-2004 16:35:29
Expiration Date	30-MAY-2004	Price List	Corporate
Ship To Location	Chattanooga (OPS)	Salesperson	Green, Ms. Suzanne
	301 Summit Hill Drive 1	Status	
		Currency	USD
	Chattanooga, TN, 37401, U	Subtotal	0.00
Bill To Location	Chattanooga (OPS)	Tax	0.00
	301 Summit Hill Drive 1	Charges	0.00
		Total	0.00
	Chattanooga, TN, 37401, L		П

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 a 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

Main	Shipping	Accounting	Pricing Fu	ulfillment A	cceptance			
	Customer	Computer Se	ervice and Renta	als	Blanket	t Number		
C	Customer Number	1006			Blan	nket Type	[ŀ
	Customer PO					ket Name		
C	Customer Contact				Contract ⁻			
	Salesperson		_		Usi	er Status		
	Activation Date	28-APR-2004	_			Status		
						n Number		
Main	Expiration Date	Disallow Nev	w Releases	Iment Sur	•ersion			[]
Main Line				Iment Sur	nmary		vation Date	
	Shipping 4	Accounting I	Pricing Fulfill		nmary		•	
	Shipping 4	Accounting I	Pricing Fulfill		nmary		•	[] [
	Shipping 4	Accounting I	Pricing Fulfill		nmary		•	
	Shipping 4	Accounting I	Pricing Fulfill		nmary		•	

Create Price List

-Create		ice List Cor	orate		Enforce Price List	
	New Mod Default Disc Default Discount a	ount % 10	A TOI Mod	New	Price List BSA TOI PL	
≸] Main	Shipping A	ccounting	Pricing Fu	fillment Summary		
Line	Item Context	Item	UOM	Price List	Unit List Price	Discount %
1	All Items Internal Item Nu		Ea	Corporate BSA TOI PL	110.00	10
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		versioning	j • ADI	illy to create cus	tomer-specific Filo	
ose tomati			_	Extend		

Terminated

Terminate - Blanket

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

Blanket			
lain Others			
Customer	Computer Service and I-	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)	Тах	0.00
	301 Summit Hill Drive	Charges	0.00
		Total	0.00
	Chattanooga, TN, 37401, L		пI
			[]]

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

b 0 Computer Sen Test Chattance 6 0 Computer Sen Test Chattance 7 0 Computer Sen Test Chattance 8 0 Computer Sen Test Chattance 9 0 Computer Sen Test Chattance 10 Internal Item Number Item UOM 5 1 0 Internal Item Numt Model 6 1 0 Internal Item Numt AS14888 Ea <t< th=""><th>Blanket Number</th><th>Revision Numbe</th><th>r Customer</th><th>Blanket Agreement Typ</th><th></th><th>hip to Locat</th></t<>	Blanket Number	Revision Numbe	r Customer	Blanket Agreement Typ		hip to Locat
6 0 Computer Sen Test Test 7 0 Computer Sen Computer Sen 9 Test Chattand Chattand 0 9 0 Computer Sen Test Test Chattand Chattand 10 0 Computer Sen Test Test Chattand 11 0 Internal Item Numt Model Test 11 0 Internal Item Numt AS51888 Ea 8 1 0 All Items Ea	5					hattanoog
7 0 Computer Sen Test Chattance 8 0 Computer Sen Test Chattance 9 0 Computer Sen Test Chattance 10 0 Computer Sen Test Chattance 10 0 Computer Sen Test Chattance 10 0 Computer Sen Test Chattance Internal Italy O Internal Italy UOM OM 5 2 O Internal Italy WSH-Lot Ea 6 1 O All Italy Ea Ea	6					lanceg
9 0 Computer Sen Test Chattance 10 0 Computer Sen Test Chattance Internal Item Number Line Number Revision Number Item Context Item UOM 5 1 0 Internal Item Numt OM-PTO-Class: Ea 5 2 0 Internal Item Numt WSH-Lot Ea 6 1 0 All Items All Items Ea	7	0			С	hattanoog
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6 1 0 Internal Item Numk AS54888 Ea 8 1 0 All Items Image: Second Secon	nmary Lines	Line Number	Revision Number	Item Context	Item	ИОМ
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	nmary Lines Blanket Number 5	1	0	Internal Item Numk	OM-PTO-Class	Ea
	nmary Lines Blanket Number 5 5	1 2	0	Internal Item Numk Internal Item Numk	OM-PTO-Class WSH-Lot	Ea Ea
10 2 0 Internal Item Numk OM-FTE-STANI Ea	nmary Lines Blanket Number 5 5 6	1 2 1	0 0 0	Internal Item Numk Internal Item Numk Internal Item Numk	OM-PTO-Class WSH-Lot	Ea Ea
10 3 0 Internal Item Numk AS54888 Ea	mmary Lines Blanket Number 5 5 6 8	1 2 1 1	0 0 0 0	Internal Item Numb Internal Item Numb Internal Item Numb All Items	OM-PTO-Class WSH-Lot AS54888	Ea Ea Ea
	nmary Lines Blanket Number 5 5 6 8 8 10	1 2 1 1 2 2	0 0 0 0 0 0	Internal Item Numb Internal Item Numb Internal Item Numb All Items Internal Item Numb	OM-PTO-Class WSH-Lot AS54888 OM-FTE-STANI	Ea Ea Ea Ea
13 1 0 Internal Item Numk OM-PTO-Class: Ea	mmary Lines Blanket Number 5 5 6 8 10 10	1 2 1 1 2 3	0 0 0 0 0 0 0 0	Internal Item Numb Internal Item Numb Internal Item Numb All Items Internal Item Numb Internal Item Numb	OM-PTO-Class WSH-Lot AS54888 OM-FTE-STANI AS54888	Ea Ea Ea Ea Ea
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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

Quote/Order Information _ Line Inform	nation Advanced	d Holds Information	Scheduling	
Internal Item		War	ehouse	
Ship To		Freigh	t Terms	
Invoice To		Freight	Carrier	
			Project AKMSCAOB	
Shipping Method		\langle	Task 2.2	
Request Date		То		
Promise Date		То		
Schedule Arrival Date		То		
Schedule Ship Date		То		
				[] []

Upadte Task/Project information on Order

	MACD					Order Total	1,624.99
Main	Pricing	Shipping	Addresses	R	leturns Services	o Others	
Line	Ordered Item	on	Project Number		Task Number	Unit Number	Customer Job
1.1	AS54888		MB54111][
D.							
		1	[1
		11	[1
0	1	11					1
		(4)			Soo n		Ð
Line	e Total		1,624.99	Lin	e Qty 1	Service Total	
Desc	ription Dimens	ion 4550				·	
	1					1	

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.

Main	Pricing	Shipping	Addresses	Returns Ser	rvices Others	
Line	Ordered Item	Qty	UOM	Unit Selling Price	User Item Description	Request
1.1	AS54888		Ea		PC Desktop	04-APR
	-	-				
	-					
	-					
	Total	1.4 I		Line Qty	Service Total	15

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.
- Supercession 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

Related Item	Description	UOM	Туре	Available Qty	Unit Selling Pric
В	b	Ea	Up-Sell	ATP not applic	5,000.0
AS92689	Envoy Standard Laptop	Ea	Related	ATP not applic	1,899.0
AS72111	Envoy Deluxe Laptop	Ea	Related	ATP not applic	2,399.0
AS72111	Envoy Deluxe Laptop	Ea	Cross-Sell	ATP not applic	2,399.0
AS72111	Envoy Deluxe Laptop	Ea	Up-Sell	ATP not applic	2,399.0
		والوالوالوالو			

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.

	nount	1,000.00		Curre	-	USD KH-down			
	Тах			Payment Te			110.00		
	arges	40.00		Suggested D	own	1	,140.00		
Order	Total	1,140.00				On Payme	nt Hold		
Prepaid Ar	nount	0.00							
Balance	Due	1,140.00							
Number	Prepay	Payment Type	Percent	Amount	Pre	paid Amount	Credit C	ard Type	Ident
1		Non-electronic ch							3222
2		Non-electronic ch	100	1,140.00					3222
	1								
							1		

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 send 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 accessorials 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

	Overrig
Transportation Char(FTECHAR)	
Transportation Char(FTECHAR)	
	I Ovening
Freight Costs FREIGHT 50.00 50.00	
Handling Costs HANDLIN(10.00 6.00 6.00 🗆 🖂	
	F

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 costthis functionality calculates what the gross margin of an order line and anorder itself is, and also to take action on orders based on business rules that use Gross Margin.

3 gros	ss margin line					Order Total	550.00
Main	l Pricing	Shipping	Addresses	Returns	Services	Others	
Line	Ordered Item	LOI	M Unit S	Selling Price	Unit Cr	ost Margin %	Margin Amoun
1.1	AS41001	Ea		550.00	105.	.06 78.99	394.94
							_
	e Total		550.00	Line Qty 1		Service Total	
Desc	ription PDA - P	ALMATE DA	ATA ASSIST	ANT			

create/View sales order in TeleSales using the Order tab

Feografia 🖪	arty Relations	0.5.2810	Businesa Wor	e)	l Account		6		
158		-1/8			_ast		Departm		-
Middle -		Alas] Helahor				
7.07		Fhore			Entail		- hu		
Address						iei	Pinaty		
							Departm	1010	
					Cea	ie Fre	Decision	Ma	
and an area	li unin ana Wind d								
		(CO.)							10000
NON DOSTO	oare O ganization	Percer Acci	post-Frene Rel	Mionship 2500	ount Lead Opporte	critik Chapte	. der _wem U	of storel ap a	1.000
Sec. Balan			(1000 C	20 - 20 C	315				
- remute	00-MAY-2002	T: 00-004Y	-2000	Filler Dy	-			Aug)	
Orb Nin	D der Der	T: 100-004Y		· Currey	C cation Data	Account N	· Contact No	Arris () • Samon	• Or
						Account N	· Contact No		
Orb Nini	0.ter5en	Omer Status Leess	· Order Total	Gurrey	C cation Dars A	1	< Contast Na		<u>Cn</u>
Ods Nini Maria	Older Tyle H Web	Omer Status Leess	- Order Total Zegitti 24	Currey LUK	C cation Dan A	ын	Contact No Tema, smy		· On <u>Ch</u> Qu
Ords Nich Mittink Mittiski	C der Synt E Wet Hulforder Only	Orici Status Licosa Hookas	* Orcer Total 72 JBN 24 - 13722 1	Currey LUR H.O	C sation Dars CAPE-111	EU EB			Cn Ch
Ords Nim Moor Messa 19500	C der Tych E Web Hulforder Only Web	Omer Status Leekas Heekas Heekas	 Order Total 77 (10174) - (31777) - (97175) 	Currey LUV EUV VSD	C cation Dart A	1411 1418 1338			<u>Cn</u> Cn Qn
Orb Nin Mari A Mari Mari Mari Mari Mari Mari Mari Mari	C derTyce He Web Hu Coder Only Web Mixed	Orren Status Leeken Heeken Heeken Heeken Heeken	* On er Told 77 J101 24 * 13*7 24 * 19*7 15 54 358 23	Cuercy 1.04 1.04 1.07 1.07 050 050	C sation Dort A	1411 1418 1538 1538		• Face On	Cn Cn Qn Qn
0(15) N (m) 9(00) 7 9(668) 10500 51/17 250	DifferFlyze E Web Hui Orfar Only Wat Mixed Wat	One Status Lense: Forkes Eucles Eucles Eucles	 Orice Total 77 (10124) 8077 (1) 1974 (15) 24,888 20 551, 22 04 	Currey 1.04 1.07 1.07 0.05 0.050 0.050	© sation Dort ▲ ····.AFF-/110 ····.AFF-/100 ····.AFF-/110 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ····.AFF-/100 ·····.AFF-/100 ·····.AFF-/100 ·····.AFF-/100 ·····.AFF-/100 ·····.AFF-/100 ·····.AFF-/100 ·····.AFF-/100 ······.AFF-/100 ······.AFF-/100 ······.AFF-/100 ·········.AFF-/100 ···········.AFF-/100 ···································	1411 1414 1535 1535 1535	larna, arny	• Face On	Ch Ch Qn Qn Qn Qn
Ords N.m. 9000 / 9000 12500 5471 / 250 2502	C der Tyrn H Web HU Char Only Web Mixed Web Web	Omer Status Lenser Henser Buckes Buckes Buckes Buckes Buckes	 Omen Total 74 (101/24) 301/24 301/24 301/24 301/24 301/24 51/368 (2) 55, 22 (2) 553 (25) 	Currey 1.14 14.17 155 155 1055 1055	2 sation Dort ▲ 11.4416/410 11.4411/410- 0.44/44/400s 0.44/44/400s 0.74/44/400s 0.74/44/400s 0.74/44/400s	1411 1414 1338 1338 1338 1338 1338	larna, arny	EIREST	Ch Ch Qn Qn Qn
Ords N. m. 9000 / 106681 12500 64717 2500 2502 2503	 OrderTyre ErWeit Fuller Onlanderty Weit Weit Weit Weit Weit Weit Weit 	Omen Status Leesen Eerken Eurken Eurken Eurken Eurken Eurken Eurken	 Omen Total 77 (101/24) 901/211 901/211 91/4/15 24/868/23 551, 22/34 553/25 1,670,754,551 	Currey 1.14 1.17 155 155 1655 1655 1655	0 eation Dort▲ 11.44H-7410 11.4411-7116 12.447447008 12.447447008 12.447447008 12.4474742008 12.4474742008 12.4474742008 12.4474742008	1411 1418 1538 1538 1538 1538 1538 1538	lama, amy Lyuri Diane	EIRE 27	Ch Ch Qn Qn Qn Qn Qn
0rds N m 1400 / / 146681 1500 547 / / 250 2502 2503 2504	 OrderTyre E Wet Fuller Order Only Wet Mixed Wet Wet Wet Wet Wet Wet 	Omor Status Lonse: Honkes Buckes Buckes Buckes Buckes Buckes Buckes Buckes Buckes Buckes	 Omen Total 7./101/24 3.1771 9.1415 54388 23 551, 22 04 553 25 670,754,55 .97415 	C (mrry 1.14 1.17 035 035 035 035 035 035 035 035 035 035	0 eation Dart ▲ 11.44H-4110 11.4411-4110 11.4411-4110 11.4444-4008 11.4444-2008 11.4444-2008 11.4444-2008 11.4444-2008 11.4444-2008 11.4444-2008 11.4444-2008	1411 1418 1533 1533 1533 1535 1535 1535 1535	lama, amy Lyuri Diane	CIREST CIREST CIREST	Ch Ch Qn Qn Qn Qn Qn Qn Qn

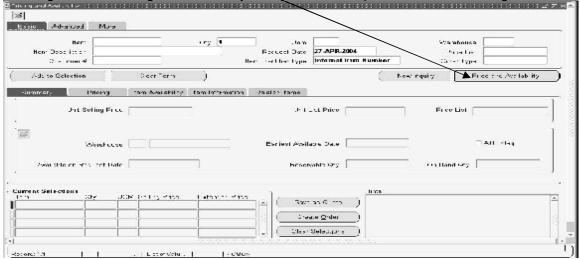
Pricing and Availability using OM

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.

ledrov Vate	Colter Sumber	Atrifada Name	OH ∀alue	New Malue	Jsei			
4 MAR 2002 22		FOD Point	Destination	SHIP	VISION			
4-MAR-2002 22	53 51380	1 OB Point	Luading Dock	Destination	VISION			
4 MAR 2002 22	:2: 51000	FOD Point	Factory	Loading Dock	VISION			
4-MAR-2002 11	:9: 91274	10B Point	Bayer	Luading Duck	VISION			
4 MAR 2002 11	:41 51274	FOD Point	Destination	Duyer	VISION			
4-MAR-2002 11	:41 91271	I OB Point	Luading Dock	Origin	VISION			
4 MAR 2002 11	:01 51270	FOD Point	Destination	Factory	VISION			
4-MAR-2002 11	:21 91271	Salesperson	Cleary, Nr. Limothy	Barry Lewis	VISION			
4 MAR 2002 11	:01 51271	FOD Point	Factory	Loading Dock	VISION			
4-MAR-2002 11	:01 91271	Payment Lerm	SU Net	30/60/00	VISION			
		14		9	10 D			
seach		Gen mento						
Product damaş	je H	Change the FOD F	Point after booking the or	der, set parameter at	entered.			

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

Steps for Drop Shipments

- 1. Navigate to the Sales Orders window.
- Reduced order fulfillment processing costs
- Elimination of losses on non-sellable goods
- Reduced inventory space requirements
- 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.

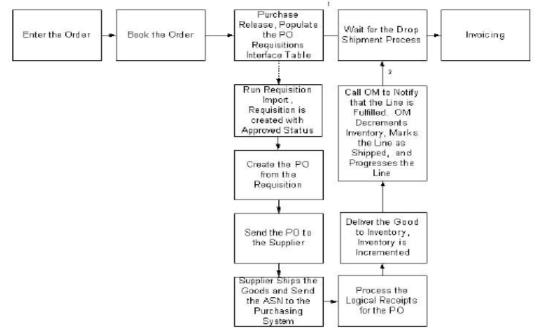
8. Approve and print the purchase order. Verify the additional sales order information for the shipments.

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.

Ordered Item	
Warehouse	V1
Request Date Qty	12
On Hand Qty	800
Qty Reservable	800
Request Date	01/06/2003 00:00:00
Available Date	01/06/2003 00:00:00
Error Message	ATP not applicable
Substitute Item	
ATP Details	<u>G</u> lobal Availability

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

Internal Item 🗖	\$54888			Warehouse		
Order Number				Order Type		
Customer			Custo	mer Number		
Ship To			Sche	edule Status		
Demand Class			Res	serve Status	Unreserved	
On Hold	· •			Pick Status	Unpicked	
Shipment Priority			c	Order Status		
Request Date		То]	
Promise Date		То				
Schedule Ship Date		To				

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

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	I
AS54888	Modern Truck	15-JAN-2003 10	30	Ea		D1	
AS54888	Modern Truck	11-JAN-2003 11	44444	Ea		D1	I
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 Innovation	27-MAR-2003 0	2	DZ			
AS54888	Imaging Innovation	27-MAR-2003 0	1	DZ			

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

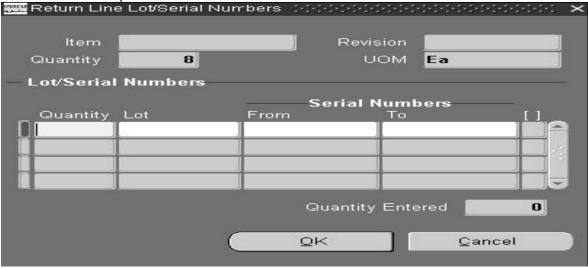
A Fulfillment set is a group of sales order lines with common attributes which must be fulfilled together this ensures that orders in fulfillment set are invoiced together making it easier to manage orders. This is done using seeded workflow & defining by fulfillment methods to model unique business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



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 orader 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 thru 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	************************
Cancel Selected Lines/Orders Cancel Remaining Lines	
Reason Comments	
<u>ōk</u>	Exit

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. Ypu 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

Hold Name	USPAL Receiva			
Hold Type	Order Administr			
Description	Testing of a rec	eivables h	bld	
Hold Criteria	Customer	- 10	06	
iteria Value	Computer Servi	ce and Re	ntals	
fold Criteria				
iteria Value				

1. To apply hold to an orderNavigate 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.

Holds	Deliveries	Invoice	es / Credit Memos	Quantity Hi	story	
At	Name	Criteria	Value	Criteria	Value	Hold Unt
1.1	Pricing Error	Order	55069			f
				-		
1						

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

- 禪武 Today's Orders - 『굿 Search Results	3	Find %	Release Holds (2020)	
C-CaPersonal Folders	Order Numbe	Additional Order Information	_ Hold Name	Held By
ம்-இPublic Folders	77840	Apply Automatic Attachments Apply Holds	BR-Generic-Hold	AKRAO
	77835	Book Order		
	10029	Calculate Tax		
	10027	Cancel		
	77831	Charges Com/		
	59757	Notification		
	77830	Price Order		
	77829	Progress Order Promotion/Pricing Attributes		
	59588	Release Holds		
		Sales Credits		
		Eind QK Cancel		
	Actions	New Order Open Order	Reason Approve	ed by Credit Manager
			Comments Paymer	it received

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 showit 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)

Name	Corpora	ite		🗆 Mobile Download	RAC	tive
Description	Corpora	nte Price List				
Currency	USD				Round To -	15
Effective Dates	01-JAN-	2002 -		Payment Terms	30 Net	
Freight Terms	Prepay	& Add		Freight Carriers		
Comments					1	
Product Context		Product Attribute	Product Value	Product Descrip		U
ltem		ltem Number	f82000	Consulting/Tra	ining	E
ltem		ltem Number	CM31556	Monitor - 19" F	lat	E
ltem		ltem Number	CM28287	Optiball Wirele	ss Mouse	E
ltem		ltem Number	CM18759	Keyboard - 101	Key	E
Item		ltem Number	CM42047	Power Cord		E
[4]						

Adding items to price list

1	- 15	
Inv.Items		
Consulting Services		
Active		
	Inv.Items Consulting Services Active ⊠ Set List Price Equal to	Inv.Items Consulting Services Active Set List Price Equal to Cost From

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.

Туре	Discount List		 Number	Net-Acc-PBH	Active		
Name			Version		C Automat c		
Currency	USD		Start Date		- [-	
Description						1 1	
3			ice Breaks*		(List Qualifier	
Modifier No	Level	Modifier Type	Adjustment Type	Accumulation Attrib	ute	Net Amount	s)
Modifier No	Level	Modifier Type	Adjustment Type			Net Amount	
Modifier No	Level	Modifier Type		Accumulation Attrib	oute	Net Amount	
Modifier No	Level	Modifier Type	Adjustment Type			Net Amount	
Modifier No	Level	Modifier Type	Adjustment Type			Net 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.

Order No.	Reg Name	Req Id	Pricing Event	Created By	Crea	ation Dat	
54941	OP OA CERT I-63911	31885	LINE	OVERATP	15-A	PR-200	
54941	QP QA CERT I-63911	31886	ORDER	OVERATP	15-A	15-APR-200	
Pricing Engir	ne Request Lines		ſ			Þ	
Line No.	Status Code	Line Id	Status Text	L	ine Index	Rela	
54941	Updated	63911	GOOD_FOR_AL	.L 6	63911	6391	
1	Updated	72826	GOOD_FOR_AL	.L 1	36737	1367	
				1			
Pricing Engir	e Request Line Details		10040	22000. 201		Þ	
	oplied Status Code	Status Text	t	Parent Line Deta	il Index Line	Detail I	
	New record creat	e QUALIFIEF	R_ONLY	34	34		
	New record creat	e QUALIFIEF	R_ONLY	35	35		
	New record creat	e GOOD_FO	R_ALL	36	36		
	New record creat	e GOOD_FO	R_ALL	37	37	Ð	

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 revisioned as & when needed.

	Business World St	andard (Agreement Number, Revision	1
Agreement Name Revision Date	01-IAN-2002	anadra z	Revision Reason	
Customer	Business World		Cust Number	1608
				Jim Smith
Agreement Type	Standard Terms A	na Cona	Contact	Jim Smith
Effective Dates	06-FEB-2002		Sales Person	
Purchase Order			Signature Date	06-FEB-2002 [
3				Create Revision
Customer Item	Address	Address Category	Product Value	Product Description
			f80000	Sentinal Multimedia
			f81000	One Year Maintenance
			f82000	Consulting/Training
			CM31556	Monitor - 19" Flat
			CM28287	Optiball Wireless Mouse

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 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 in the 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 ormore salespeople. This report displays the order and each order line associated with each salesperson.

Setup Considerations(mandatory & optional steps)

Step 1: Flex elds 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: Pro Ie 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: Work ow 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: Con gurations 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.

