11i Implement and Use Order Management

Student Guide Volume 1

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Preface

Profile

Before You Begin This Course

Before you begin this course, you should have the following qualifications:

- Knowledge of the order management process
- Ability to navigate in Oracle Applications
- Working experience with Oracle Order Management, Oracle Bills of Material, and Oracle Inventory

Prerequisites

- Oracle Bills of Material
- Oracle Inventory

How This Course Is Organized

11I Implement and Use Order Management is an instructor-led course featuring lecture and hands-on exercises. Online demonstrations and written practice sessions reinforce the concepts and skills introduced.

Related Publications

Oracle Publications

Title	**Part Number**
Oracle Order Management User's Guide	*A77028*
Oracle Configurator Developer User's Guide	A73280-06

Additional Publications

- System release bulletins
- Installation and user's guides
- *read.me* files
- *Oracle Magazine*

Typographic Conventions

Typographic Conventions in Text

Convention	Element	Example
Bold italic	Glossary term (if there is a glossary)	The ***algorithm*** inserts the new key.
Caps and lowercase	Buttons, check boxes, triggers, windows	Click the Executable button. Select the Can't Delete Card check box. Assign a When-Validate-Item trigger to the ORD block. Open the Master Schedule window.
Courier new, case sensitive (default is lowercase)	Code output, directory names, filenames, passwords, pathnames, URLs, user input, usernames	Code output: `debug.set ('I", 300);` Directory: `bin` (DOS), `$FMHOME` (UNIX) Filename: Locate the `init.ora` file. Password: User `tiger` as your password. Pathname: Open `c:\my_docs\projects` URL: Go to `http://www.oracle.com` User input: Enter `300` Username: Log on as `scott`
Initial cap	Graphics labels (unless the term is a proper noun)	Customer address (*but* Oracle Payables)
Italic	Emphasized words and phrases, titles of books and courses, variables	Do *not* save changes to the database. For further information, see *Oracle7 Server SQL Language Reference Manual.* Enter `user_id@us.oracle.com`, where *user_id* is the name of the user.
Quotation marks	Interface elements with long names that have only initial caps; lesson and chapter titles in cross-references	Select "Include a reusable module component" and click Finish. This subject is covered in Unit II, Lesson 3, "Working with Objects."
Uppercase	SQL column names, commands, functions, schemas, table names	Use the SELECT command to view information stored in the LAST_NAME column of the EMP table.

Convention	Element	Example
Arrow	Menu paths	Select File—> Save.

Brackets	Key names	Press [Enter].
Commas	Key sequences	Press and release keys one at a time: [Alternate], [F], [D]
Plus signs	Key combinations	Press and hold these keys simultaneously: [Ctrl]+[Alt]+[Del]

Typographic Conventions in Code

Convention	Element	Example
Caps and lowercase	Oracle Forms triggers	`When-Validate-Item`
Lowercase	Column names, table names	`SELECT last_name` `FROM s_emp;`
	Passwords	`DROP USER scott` `IDENTIFIED BY tiger;`

	PL/SQL objects	`OG_ACTIVATE_LAYER`
		`(OG_GET_LAYER`
		`(‘prod_pie_layer’))`

Lowercase italic	Syntax variables	`CREATE ROLE` *`role`*
Uppercase	SQL commands and functions	`SELECT userid` `FROM emp;`

Typographic Conventions in Navigation Paths

This course uses simplified navigation paths, such as the following example, to direct you through Oracle Applications.

(N) Invoice > Entry > Invoice Batches Summary (M) Query > Find (B) Approve

This simplified path translates to the following:

1. (N) From the Navigator window, select Invoice > Entry > Invoice Batches Summary.

2. (M) From the menu, select Query > Find.

3. (B) Click the Approve button.

Notations :

(N) = Navigator

(M) = Menu

(T) = Tab

(I) = Icon

(H) = Hyperlink

(B) = Button

Typographical Conventions in Help System Paths

This course uses a “navigation path” convention to represent actions you perform to find pertinent information in the Oracle Applications Help System.

The following help navigation path, for example—

(Help) General Ledger > Journals > Enter Journals

—represents the following sequence of actions:

1. In the navigation frame of the help system window, expand the General Ledger entry.

2. Under the General Ledger entry, expand Journals.

3. Under Journals, select Enter Journals.

4. Review the Enter Journals topic that appears in the document frame of the help system window.

Getting Help

Oracle Applications provides you with a complete online help facility.

Whenever you need assistance, simply choose an item from the Help menu to pinpoint the type of information you want.

To display help for a current window:

1. Choose Window Help from the Help menu, click the Help button on the toolbar, or hold down the Control key and type 'h'.

   A web browser window appears, containing search and navigation frames on the left, and a frame that displays help documents on the right.

   The document frame provides information on the window containing the cursor. The navigation frame displays the top-level topics for your responsibility, arranged in a tree control.

2. If the document frame contains a list of topics associated with the window, click on a topic of interest to display more detailed information.

3. You can navigate to other topics of interest in the help system, or choose Close from your web browser's File menu to close help.

Searching for Help

You can perform a search to find the Oracle Applications help information you want. Simply enter your query in the text field located in the top-left frame of the browser window when viewing help, then click the adjacent Find button.

A list of titles, ranked by relevance and linked to the documents in question, is returned from your search in the right-hand document frame. Click on whichever title seems to best answer your needs to display the complete document in this frame. If the document doesn't fully answer your questions, use your browser's Back button to return to the list of titles and try another.

Overview of Order Management

Chapter 1

Overview to the Order Management Process

Objectives

After completing this course, you should be able to do the following:

- Define the functions and features relating to:
  - Managing customers
  - Entering and importing orders and returns
  - Configuring orders
  - Managing orders
  - Setting up and implementation

What is Oracle Order Management

- A multifacteted part of an integrated suite of e-business applications for the enterprise.
- Highly extensible and customizable to meet your business requirements.
- Designed for easy user interface

Oracle Order Management Suite

- Oracle Order Management (includes basic pricing)
- Oracle Shipping Execution
- Oracle Configurator
- Oracle Advanced Pricing
- Oracle Release Management and e-Commerce Gateway
- Customer, Carrier, Shipper, and Order Management Portals

Other Applications that support Oracle Order Management

- Oracle Inventory
- Oracle Bills of Material
- Oracle Receivables
- Oracle Work in Process
- Oracle Purchasing
- Customer Relationship Management Suite
- External Systems

Oracle Order Management Features

Oracle Order Management Features

- Enables management of customer and customer relationship information including defining ship, arrival and fulfillment sets
- Automatically checks credit during order entry
- With iPayment integration, offers seamless credit card verification
- Uses Workflow for required approvals
- Uses Workflow for required approvals
- Uses processing constraints set by responsibility to control changes to orders
- Permits holds to be defined using two entities

Oracle Order Management Features

Oracle Order Management Features

- Defines items using the Oracle Inventory scope of functions and defines bills of material using the Oracle Bill of Material functions
- Offers item cross-referencing usage as an entry option
- Allows decimal quantity handling
- Enables available-to-promise (ATP) viewing and reserving across the supply chain
- Communicates demand to manufacturing

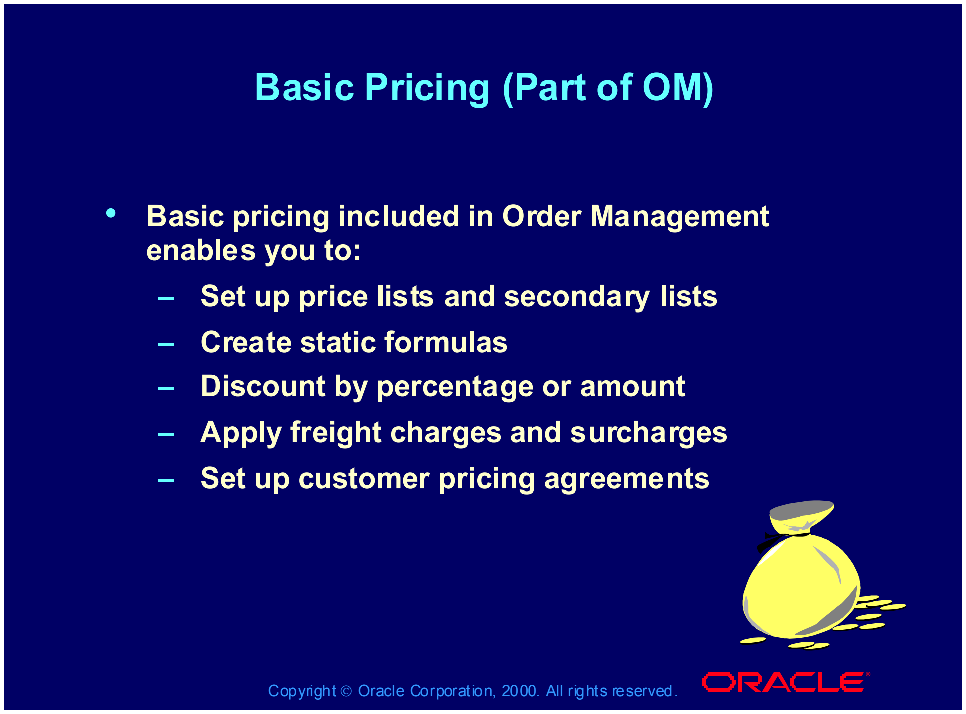
Oracle Order Management Features

- Supplies product configuration capabilities for:
  - Assemble-to-order (ATO)
  - Pick-to-order (PTO)

Oracle Order Management Features

- Provides support for Tax Triangulation:
  - For all transactions including European Union Triangulation for International Drop Shipments
- Sends comprehensive, detailed information to Receivables for processing through Autoinvoice
- Furnishes standard reports to assist business processing and analysis

Basic Pricing (Part of OM)

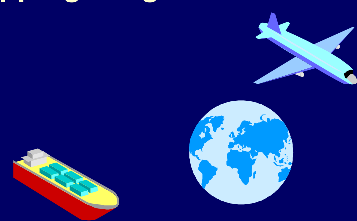


Oracle Advanced Pricing

- Uses a powerful pricing engine to perform simple and complex pricing calculations.
- Using Oracle Advanced Pricing, you can do basic pricing and :
  - Set qualifier groups
  - Perform attribute mapping
  - Price by item category
  - Set price breaks
  - Create dynamic formulas
  - Have promotion and deal capability, including using coupons and pricing discounts

Oracle Shipping Execution (Packaged with OM)

- Offers flexible, extensive shipment planning capabilities
  - over and under shipments
- Provides for capturing freight and special charges
- Permits Oracle Shipping Integration to UPS Online Systems



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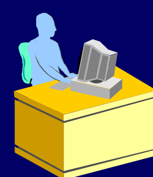
Oracle Configurator

- Capability to create configuration rules to control user selection of product options
- Ability to guide the user through product selections to choose an accurate configuration
- Ability to give prices for models, option classes and options
- Ability to conduct ATP checks on product availability
- Ability to validate user choices to ensure accuracy of configured product

Oracle Release Management (RLM)

- Automates the management and reconciliation of:
  - customer planning, shipping, and production sequence schedules
  - generating updates to sales order and forecasts



Oracle Order Management Features

Oracle Order Management Features

- Offers comprehensive processing of:
  - Orders
  - Returns
  - Mixed orders and returns
  - Drop Shipments
- Performs order capture from any source using Oracle e-Commerce Gateway
- Has order pricing, change, copy, cancel and monitoring capabilities

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Objectives

- Describe the main capabilities used during configuration and order processing such as:
  - Entering, credit checking and credit card verification, pricing and discounting orders. Entering mixed return and ordered items on sales order.
  - Managing holds, releases, and approval notifications
  - Checking available to promise throughout your supply chain; scheduling and reserving orders
  - Selecting options of assemble-to-order (ATO), and pick-to-order (PTO) models and kits during order entry by using the Oracle

Objectives

Objectives

- Summarize the setup steps required to manage customers, items, orders and lines.
- Define the steps required before passing the order to Oracle Shipping Execution, including:
  - creating tolerances for over and under shipments
  - providing support for Tax Triangulation
- List some of the standard Oracle reports which support the configure-to-order business process
- Process drop ship orders


Agenda
Order Management features
Managing customers
Entering and importing orders and returns
Configuring orders (CTO, ATO, and PTO)
Managing orders
Managing quotes
Setting up and implementation
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Meeting your Business Needs

Meeting your Business Needs

- Use Oracle APIs to modularize the applications, mixing and matching the components to fit your changing business environment.
- Oracle Order Management has other ways to tailor to meet your business rules:
  - Processing Constraints which sets the limits and authority for specifying when changes or canceling may occur
  - Defaulting Rules which are used to automatically fill in data you set up to speed and control order entry
  - Workflow which offers flexibility in defining business processes for order processing

Order Management Interfaces

- Order Import
- e-Commerce Gateway
- Purchase Release
- Invoice Interface
- Inventory Interface
- Shipping Interface

Order Management Key APIs

Order Management Key APIs

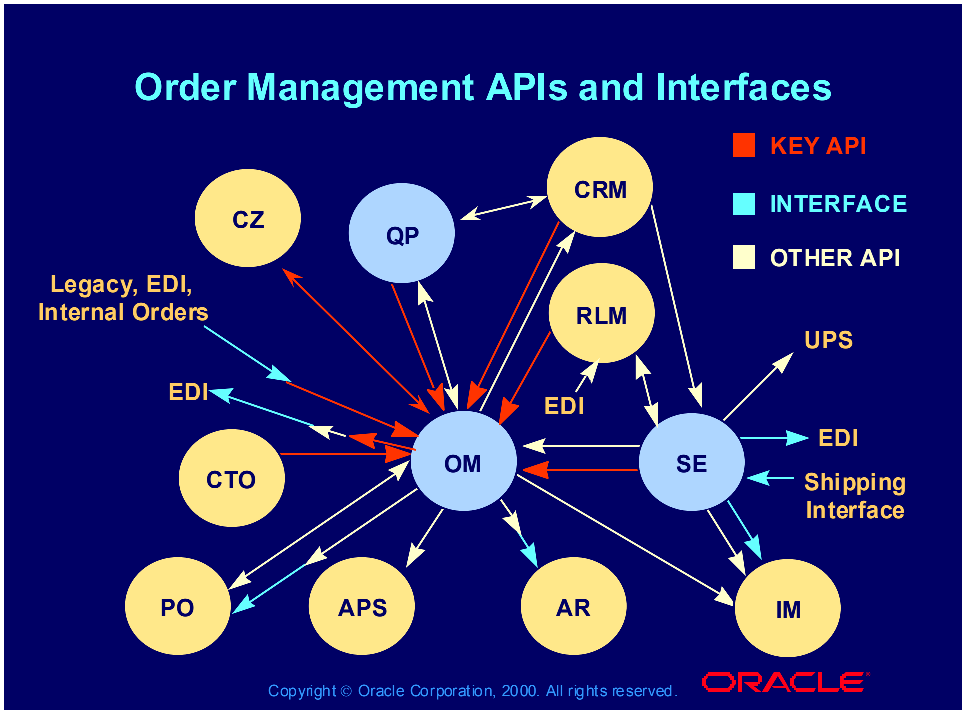
- Eight key APIs between OM and :
  - Shipping Execution (SE)
  - Configurator (CZ)
  - Customer Relationship Management (CRM)
  - Pricing (QP)
  - Release Management (RLM)
  - Configure to Order (CTO, formerly ATO)
  - e-Commerce Gateway
  - Process order (for data manipulation to the Sales Order business object within Order Management)

Other APIs Interface with these Products

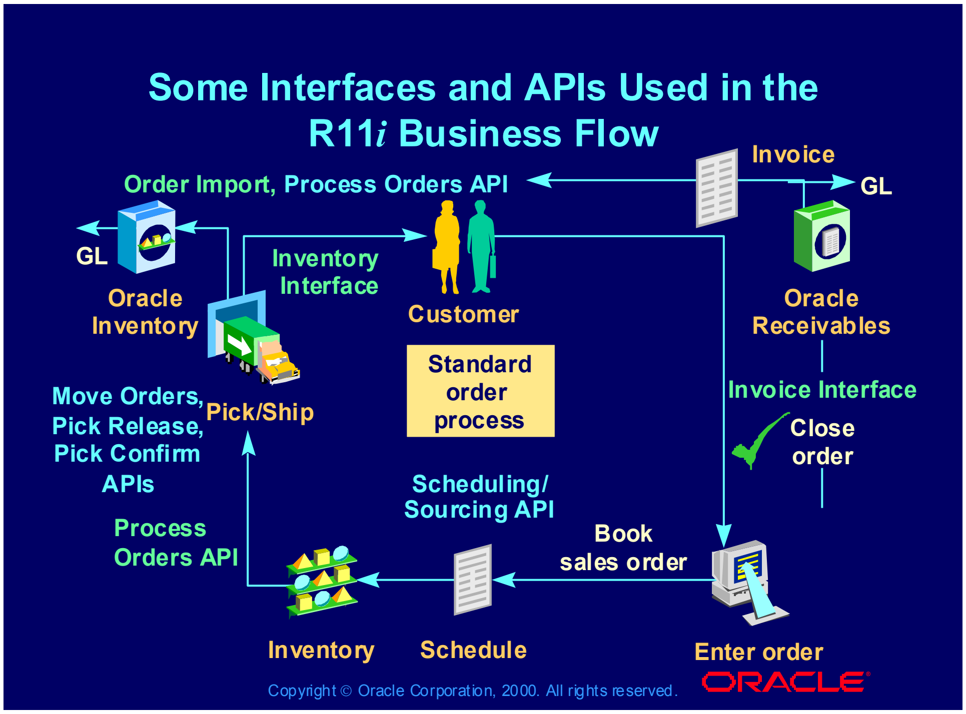
Other APIs Interface with these Products

- Purchasing (PO)
- Advanced Planning and Scheduling (APS)
- Accounts Receivables (AR)
- Inventory Management (IM)
- Shipping Execution (SE)
- Configurator (CZ)
- Customer Relationship Management (CRM)
- Pricing (QP)
- Release Management (RLM)
- Configure to Order (CTO)

Order Management APIs and Interfaces



Some Interfaces and APIs Used in the R11i Business Flow



Processing Constraints

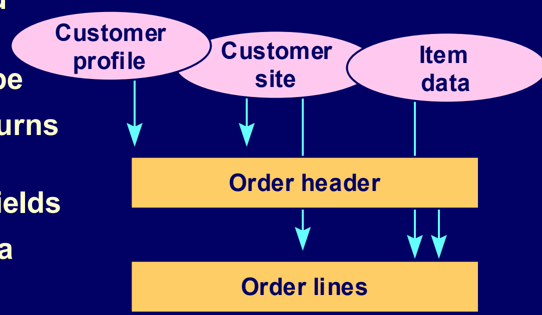
Use Processing Constraints to meet your business needs by:

- Establishing security of your Sales Orders by:
  - Setting the detail of when users can make changes or cancellation to sales orders
  - Posting an instant message to user to inform of violations to established rules.
  - Preventing the user from saving any violation conditions.

Defaulting Rules

Defaulting Rules

- Replace Standard Value Rule Sets
- Default Order Type
- Defaulting for returns
- Defaulting from Descriptive Flexfields
- Can use a formula (today + 7)
- PL/SQL API for more complex case needs

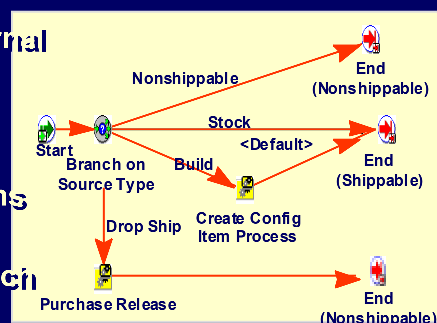


Workflow

The Workflow engine:

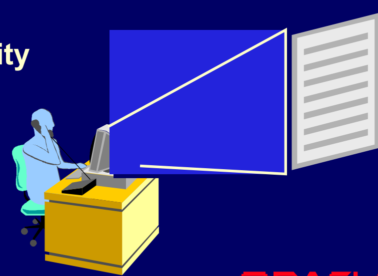
- Moves orders and lines through their processing flow
- Sends notifications and notification e-mails to both internal and external sources
- Maintains a history of activity status
- Detects error conditions
- The workflow monitor shows the status of each order and order line process in both list form and graphic form

Sample Possible Workflow



Order Management Portal (Part of OM)

- The Internet Customer Portal is a self-service web application. A customer can:
  - View existing orders with a web browser.
  - Query by criteria, for example, purchase order number, project number, and sales representative.
  - View item availability



Agenda

- Order Management Features
- Managing customers
- Entering and importing orders and returns
- Configuring orders (CTO, ATO, and PTO)
- Managing orders
- Managing quotes
- Setting up and implementation

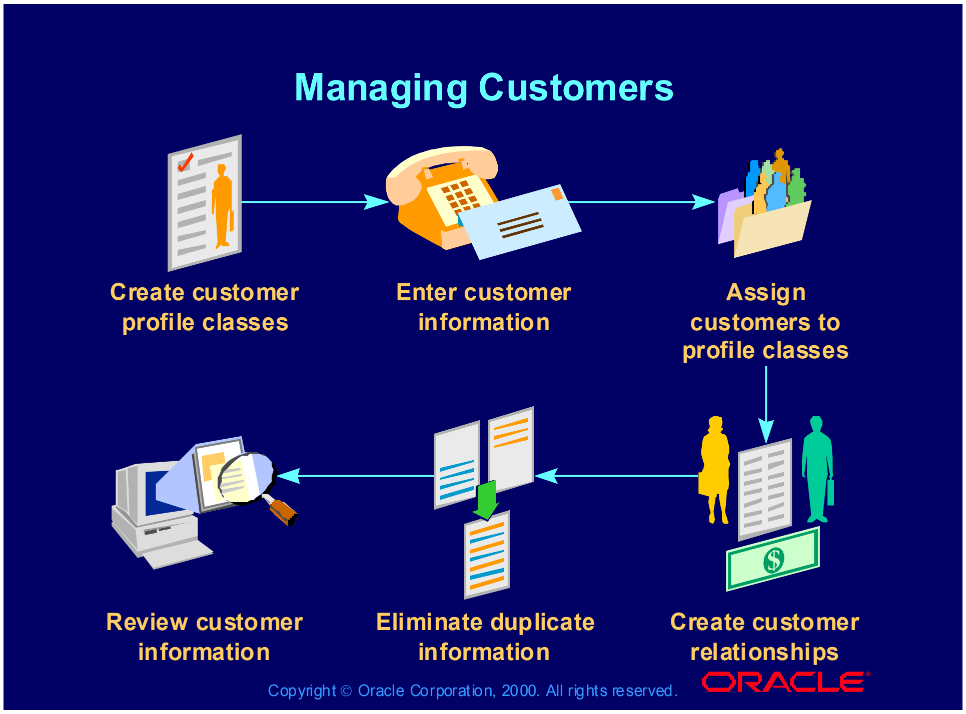
Customers

Customers

- You can:
  - Create customer profile classes and assign them to customers
  - Create and maintain customer information
  - Enter multiple ship-to sites for each customer
  - Enable related customers to establish reciprocal payment and contract terms
  - Review customer information online and in reports

Note: The system will perform a search for your customer before it allows you to enter a new customer. This provides a check for duplicate customer entry.

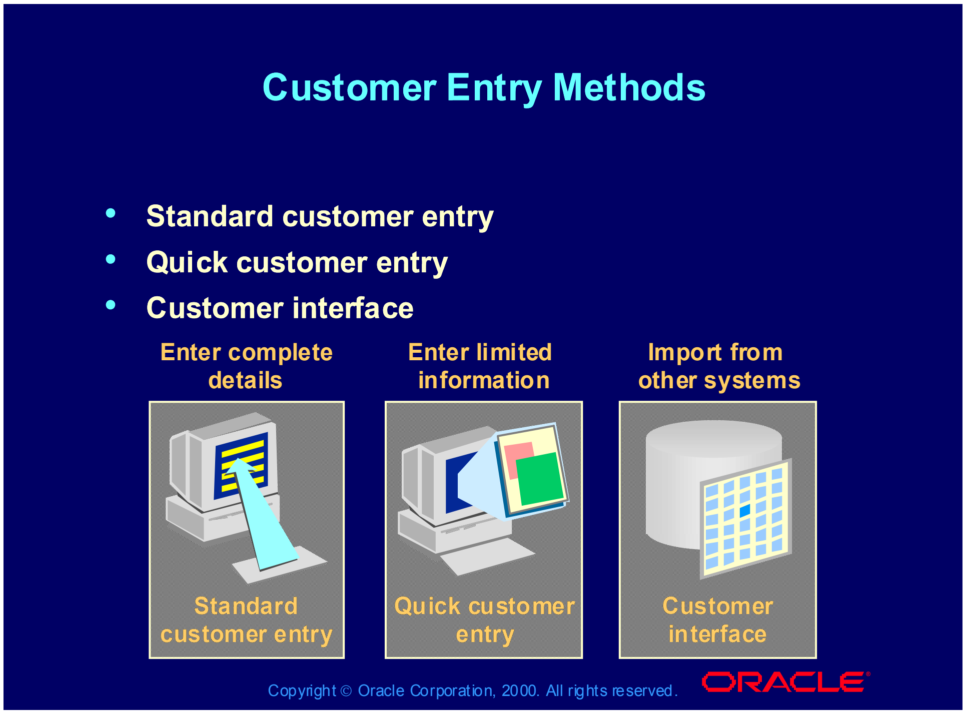
Managing Customers



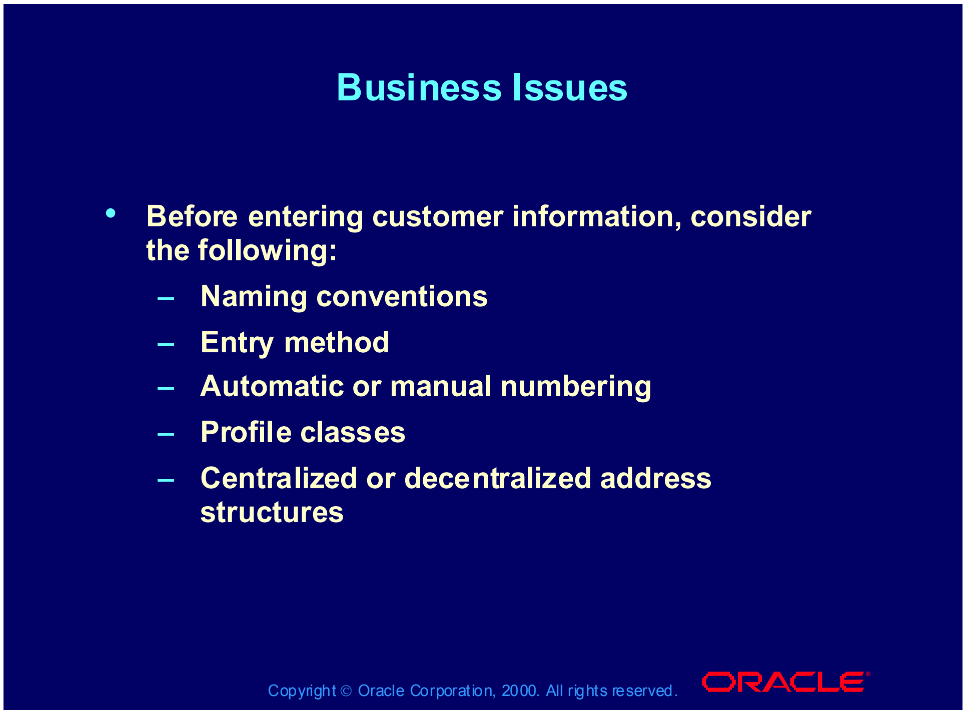
Managing Customer Profiles

- You can set credit and order limits for each customer, or customer site with the use of profile class.
  - Orders go on hold automatically if they violate these limits.
- When you establish a customer, the customer processing function assigns it to the default (seeded) customer profile class.
  - Note: If you want to assign the customer to a different profile class, select it from the list of values before you save your work.

Customer Entry Methods



Business Issues

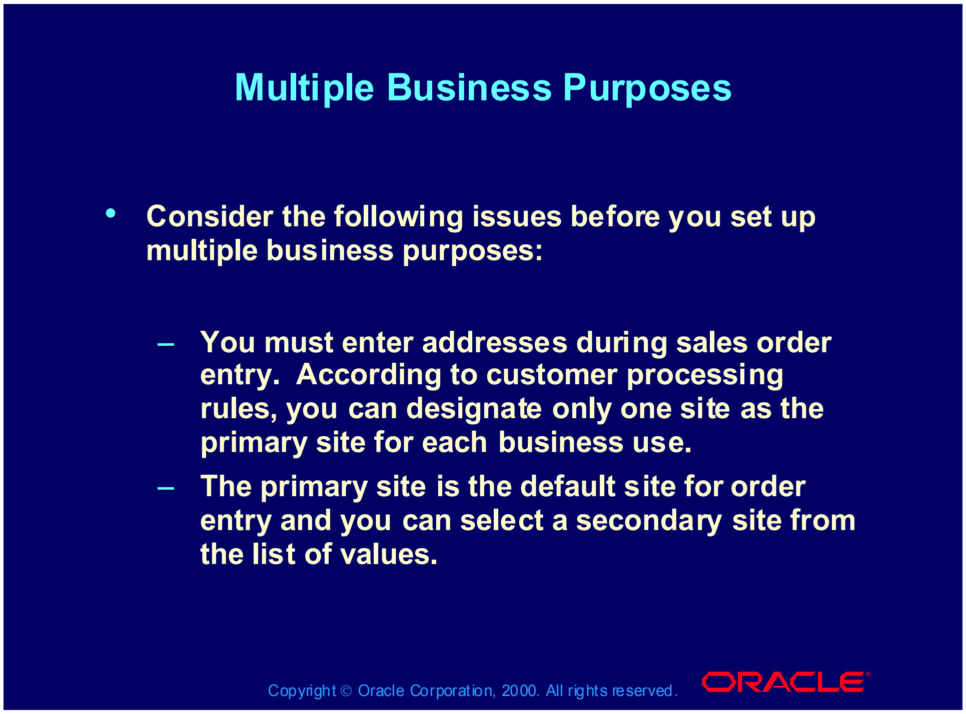


Business Issues

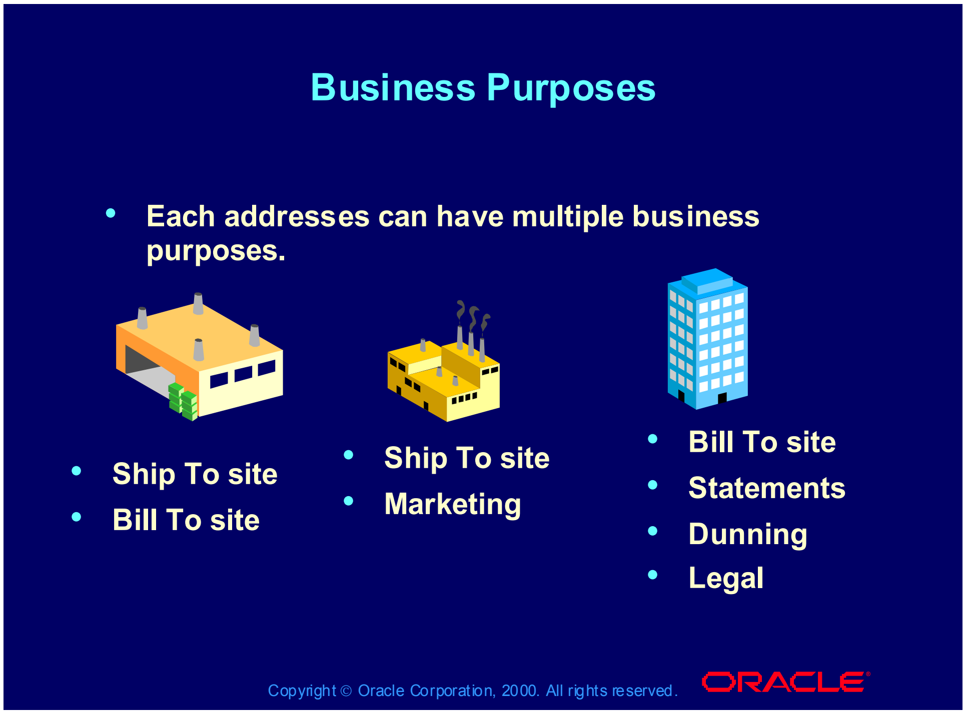
Business Issues

- **Classifications and grouping for reporting and pricing functionality, for example:**
  - **Customer class**
  - **Customer type**
  - **Sales channel**
  - **Category**
  - **SIC Code**

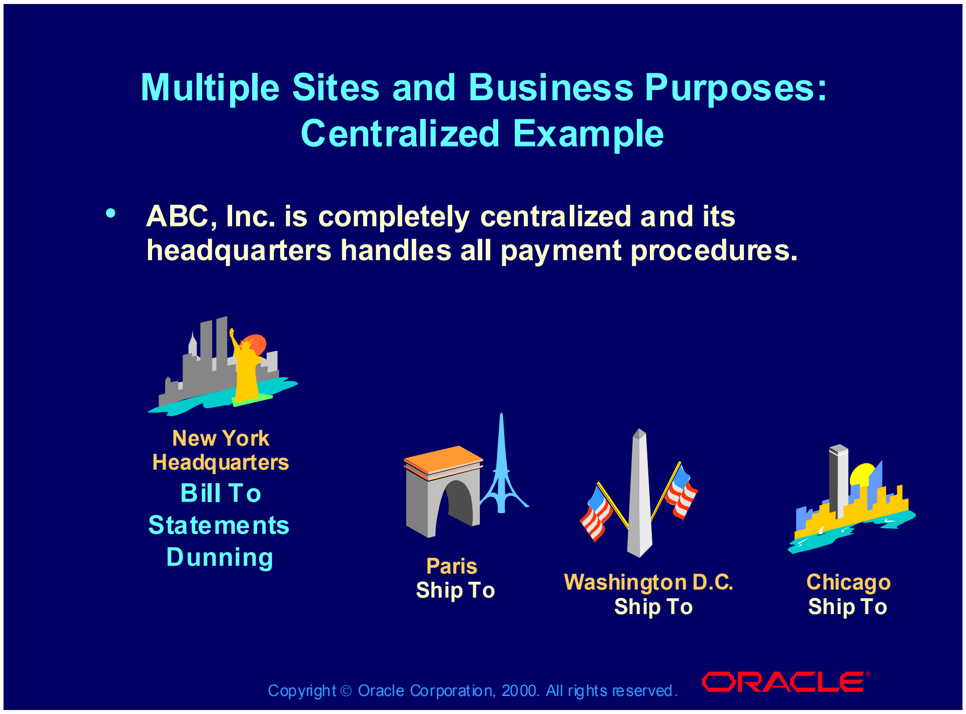
Multiple Business Purposes



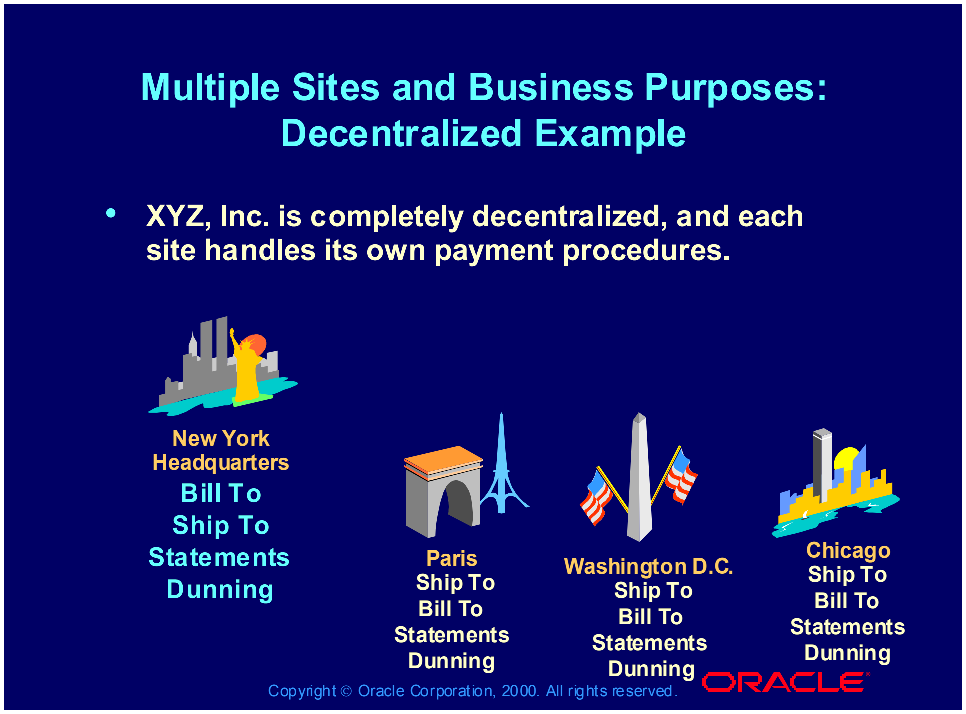
Business Purposes

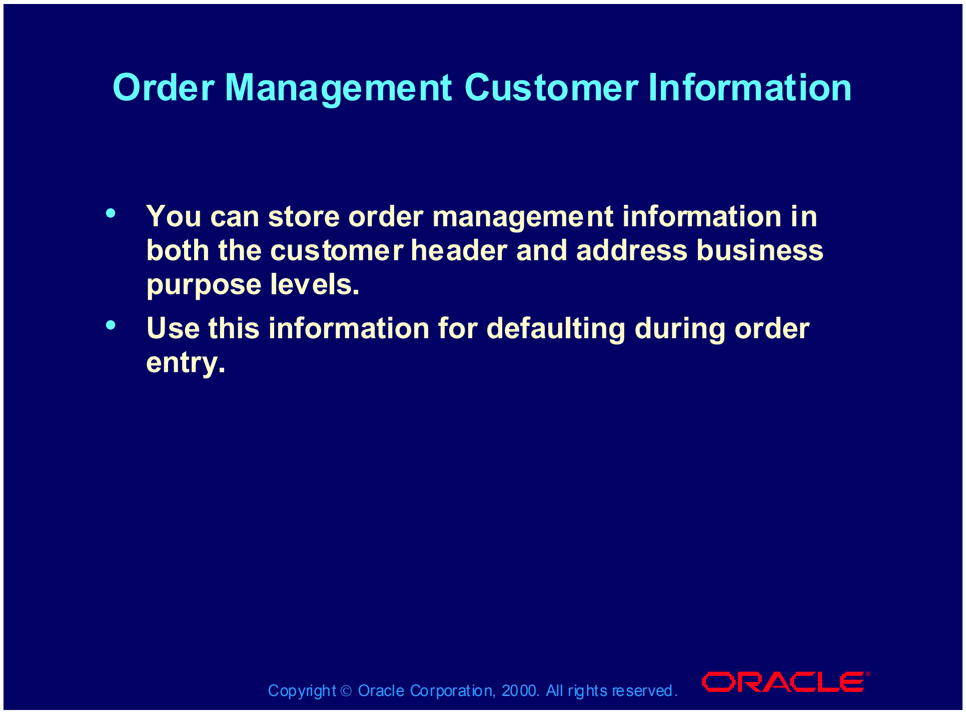


Multiple Sites and Business Purposes: Centralized Example



Multiple Sites and Business Purposes: Decentralized Example




Order Management Customer Information
• You can store order management information in both the customer header and address business purpose levels.
• Use this information for defaulting during order entry.
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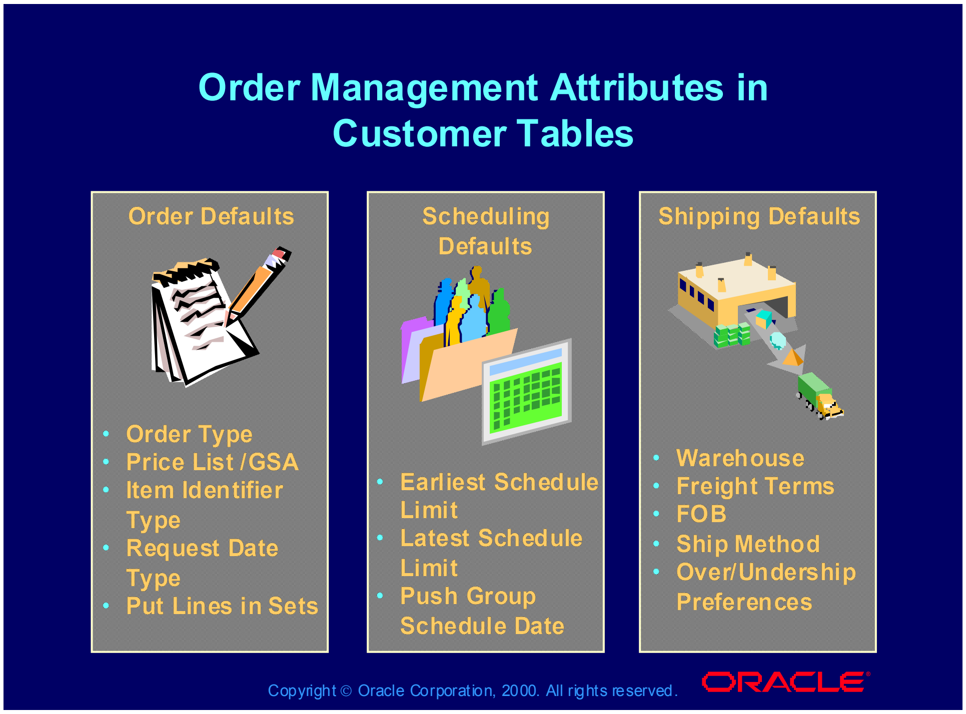
Order Management Attributes in Customer Tables

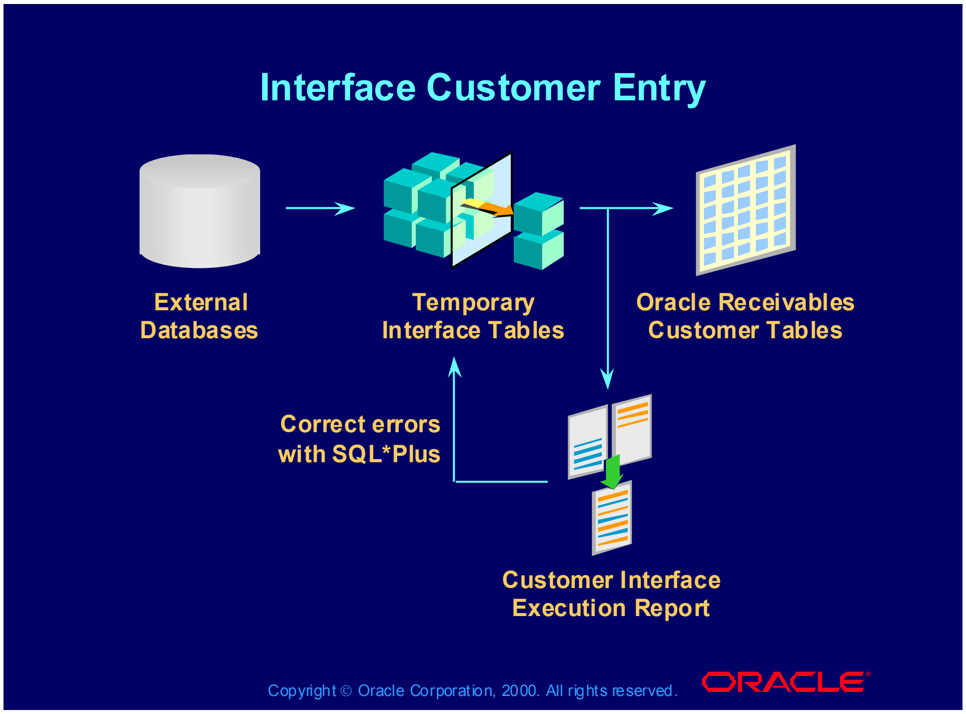


Over and Under Shipments

Over and Under Shipments

- You can set up over and under shipment tolerances for customers, addresses, customer sites and items.
- You can set up options regarding what to invoice such as:
  - Items shipped
  - Items ordered
  - Amounts up to the over-shipment tolerance
  - Specific users who can override the shipment tolerances

Interface Customer Entry



Customer Relationships

Customer Relationships

- Link one customer to another.
- Enforce invoicing and receipt-application controls.
- Can only exist between *two* customers.
- Are not transitive: If A is related to B and B is related to C, A and C are not related.
- Can be reciprocal or non-reciprocal.
- Allow you to select a related customer's ship-to address during order entry.

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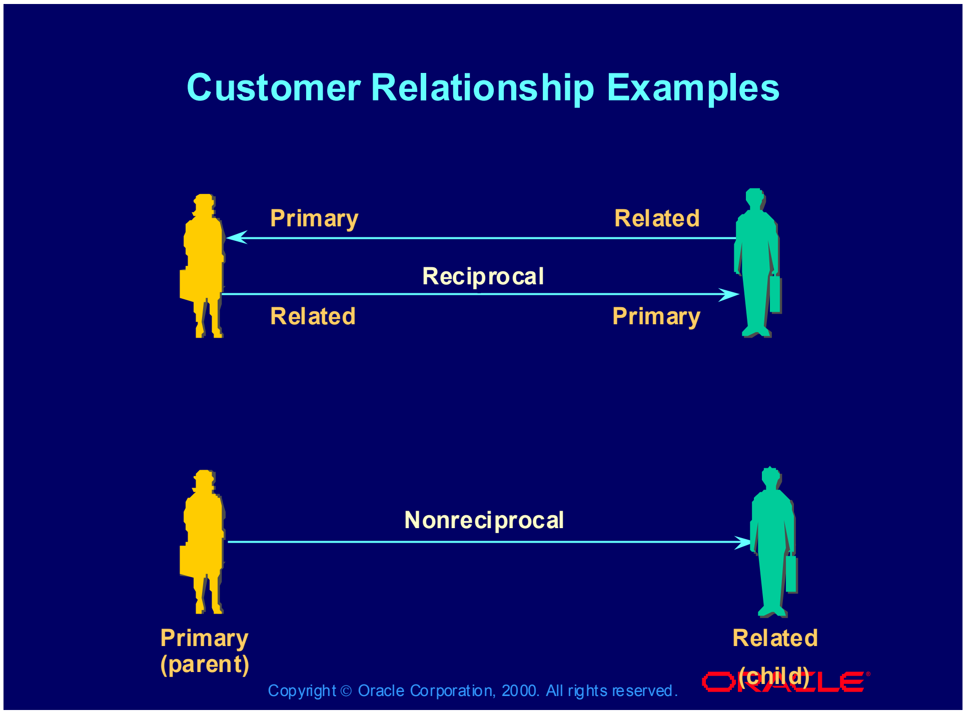
Customer Relationship Examples



Merge Customers

Merge Customers

Merge customers to:

- **Eliminate incorrect data and duplicate information**
- **Consolidate account site data**
- **Reflect customer account changes due to business consolidation**

Merge Overview

- Merging customer information combines all information for two customer accounts or account sites, striped by operating unit.
- You can delete or inactivate the merge-from customer account and account sites uses.
- Before merging customers, consider archiving the historical data for the absorbed customer account or account site.

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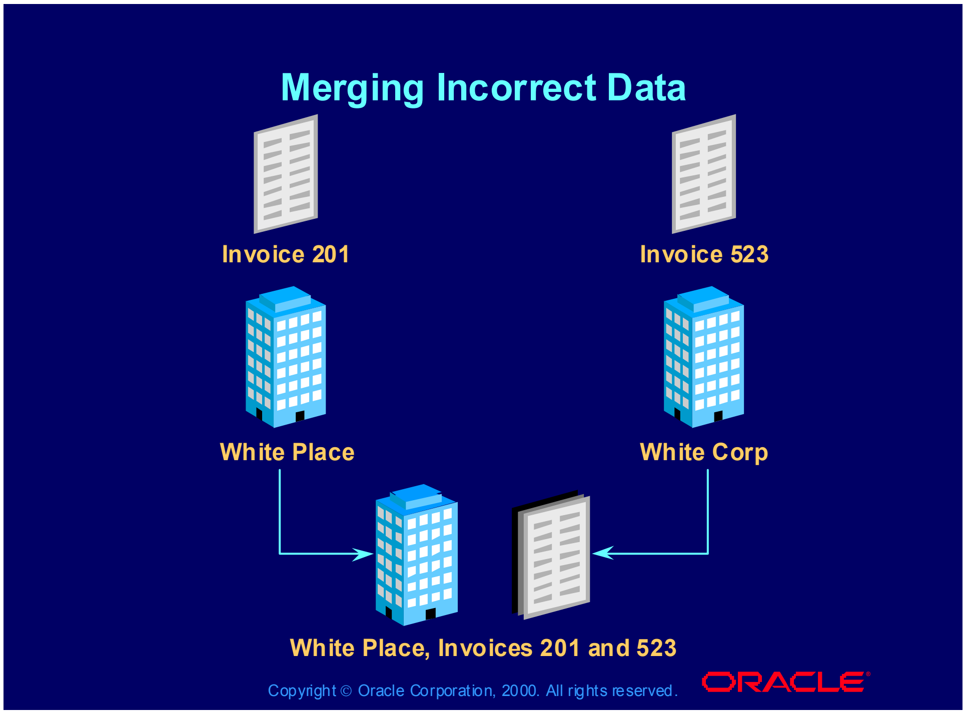
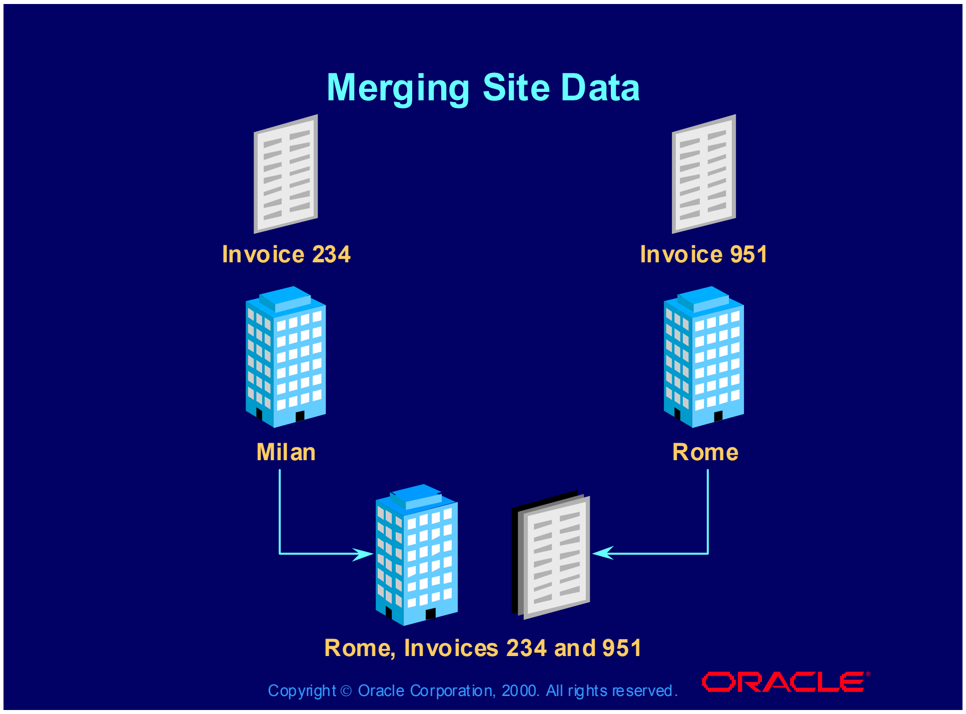
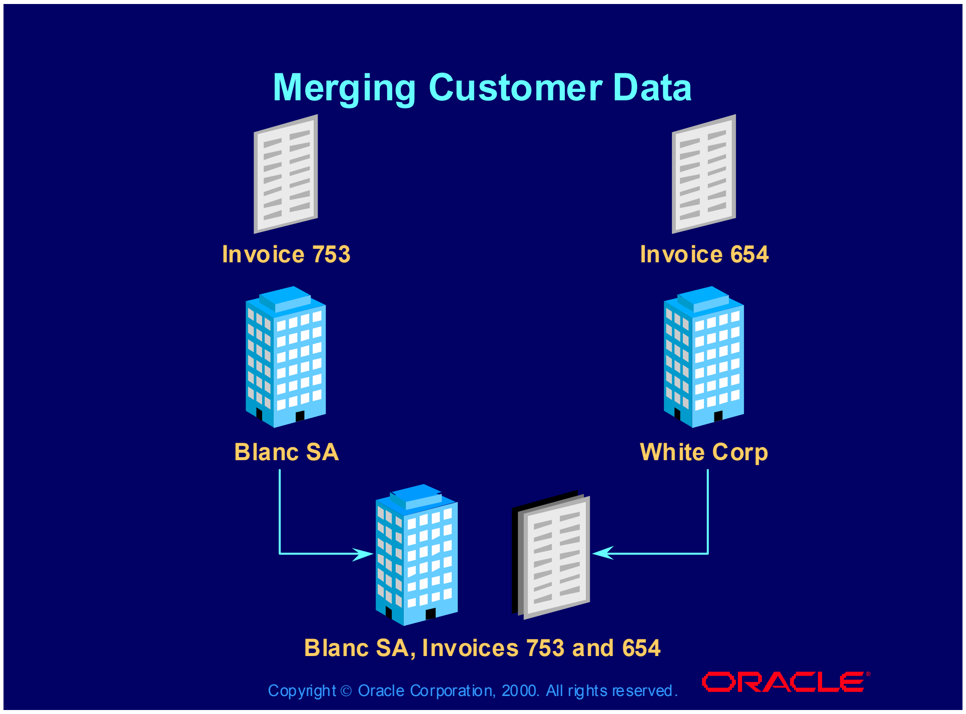
Merging Incorrect Data



Merging Site Data



Merging Customer Data



Reviewing Customer Information

Reviewing Customer Information

With Oracle Order Management, you can:

- Review customer data online
- Search for specific customer information
- Query summary or detail levels of information

- With Oracle Receivables, you can Generate reports using the standard report submission window (le
- With the CRM suite, you can extend your view of customer information with customer intelligence reports and forms

Common Search Scenarios

To....	Then...
Find all customers assigned to a profile class	Search by profile class
Review detailed information about customer	Search by using customer name or number, or address information
View all customers belonging to an SIC code	Query using the SIC code

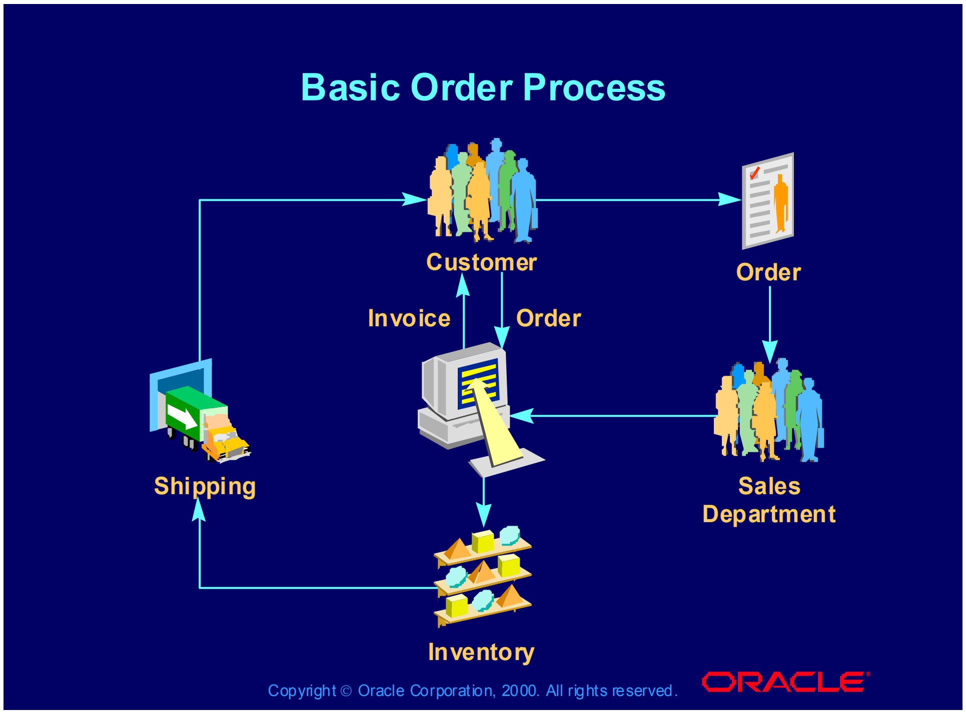
Credit Card Processing

- You can validate a customer credit card during order entry and Oracle iPayment will validate and return authorization information back to Order Management.
- You can mask sensitive credit card data through a Profile Option.
- Payment capture occurs in AR

Agenda

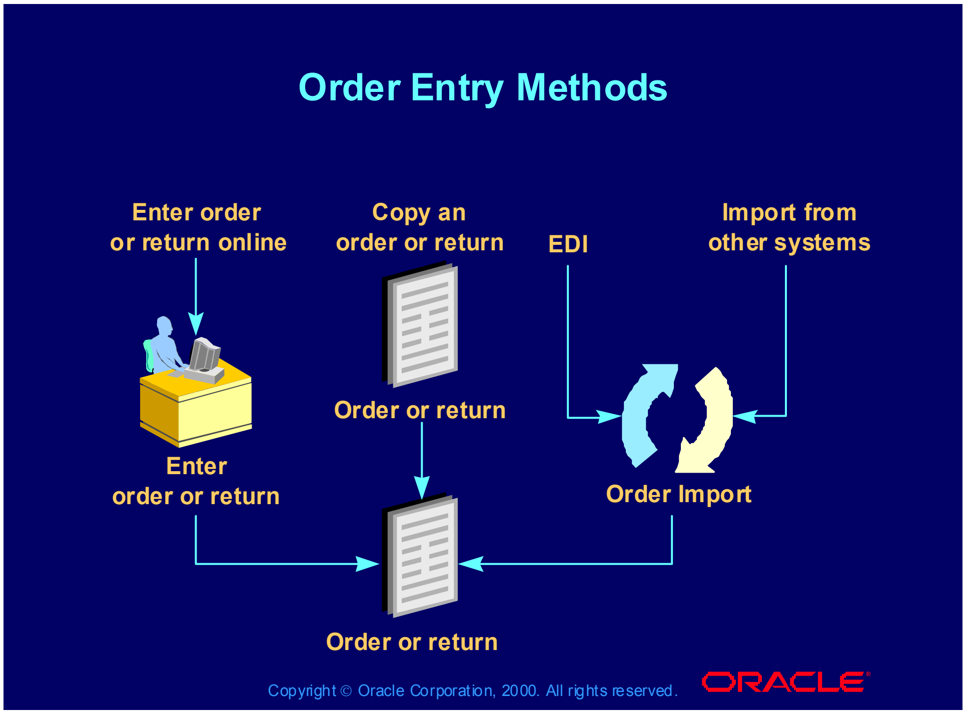
- Order to Invoice Process
- Managing customers
- Entering and importing orders and returns
- Configuring orders (CTO, ATO, and PTO)
- Managing orders
- Managing quotes
- Setting up and implementation

Basic Order Process

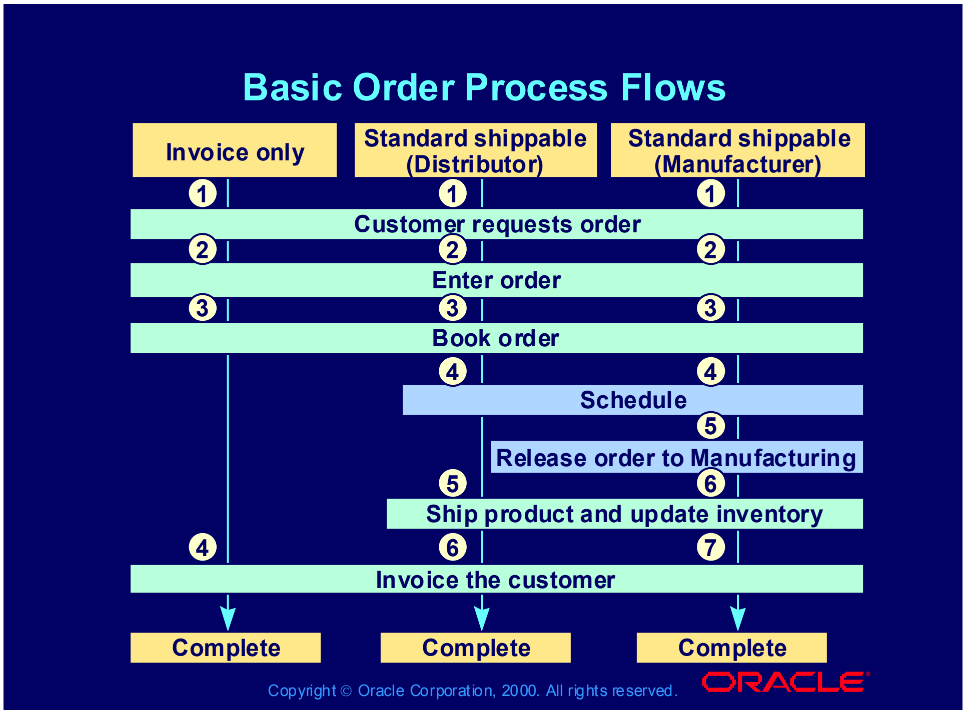


Be sure to note that items must be set up in inventory before they can be ordered.

Order Entry Methods



Basic Order Process Flows



Sales Order Entry

- Use the Sales Orders window to enter orders and returns.
- Use the Order Information tabs to enter header information not specific to a particular line.
- Use the Line Items tabs to enter information specific to each line item.
  - Line item information overrides the same type of information entered at the header lever.
  - Sales Order lines can contain both inbound and outbound line types.

Header Information

The Order Information section of the Sales Orders window allows you to enter header information such as:

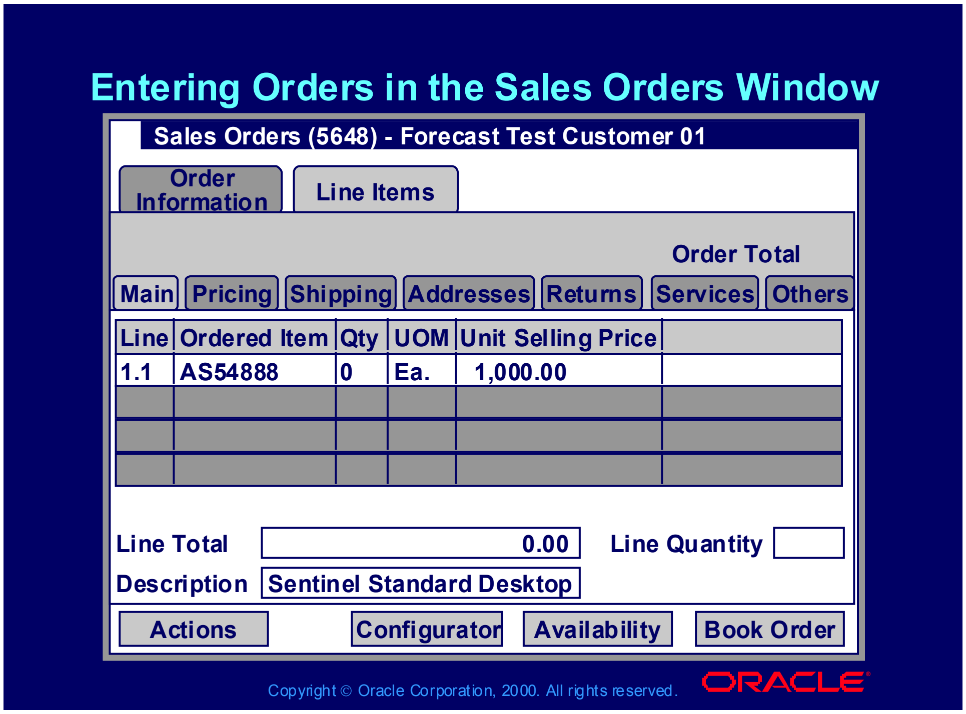
- Customer, customer bill-to and ship-to addresses
- Order type
- Price list and payment terms
- Salesperson and sales credit
- Currency and tax information
- Payment and freight terms
- Credit card number
- General shipping information

Line Information

The Line Items section of the Sales Orders form enables you to enter main information such as:

- Ordered item, quantity (whole or decimal).
- Scheduled ship date
- Pricing Information
- Shipping Information
- Addresses
- Return information
- Service information
- Miscellaneous information such as the project number

Entering Orders in the Sales Orders Window



Line Sets

Line Sets

Lines with similar needs may be grouped together to meet customer demands. The three types of line groupings are:

- Ship sets
- Arrival sets
- Fulfillment sets

- OM can automatically put lines into sets
- Users can change set attributes in Sales Order form
- Shipping can break sets as needed to r

shipping needs

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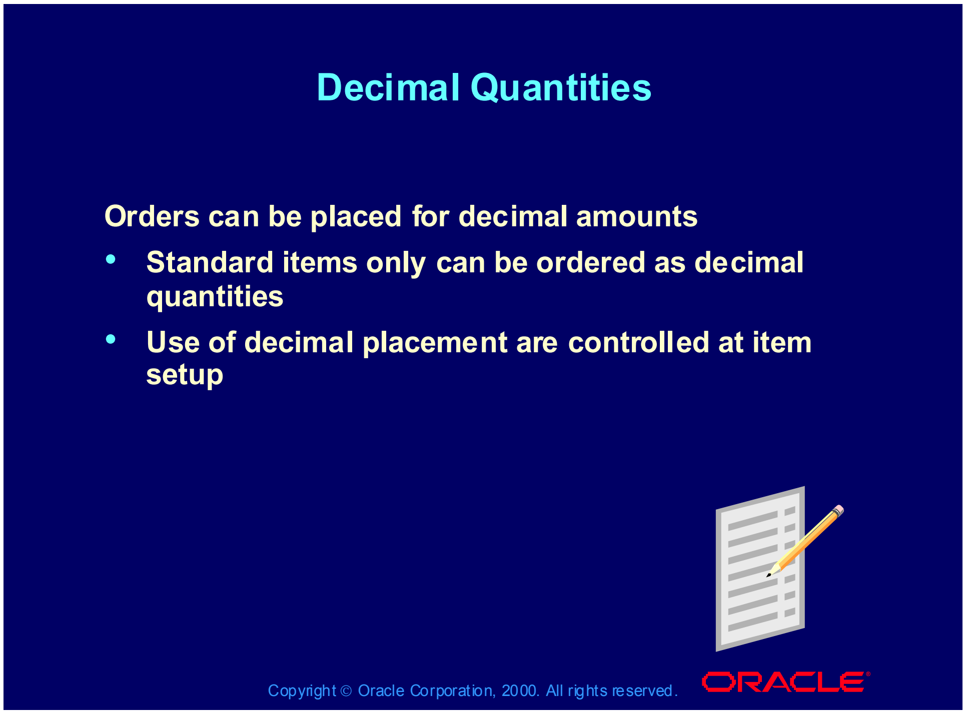
Item Cross-Reference

Cross references allow users to use a non inventory item number within the sales order to meet customer needs.

Item cross references are:

- Set up in the Item Master form
  - Customer item numbers
  - UPC codes
  - EAN numbers
  - Any generic item identifiers
- Can be entered manually or through Order Import
- The cross reference value can print on documents and reports

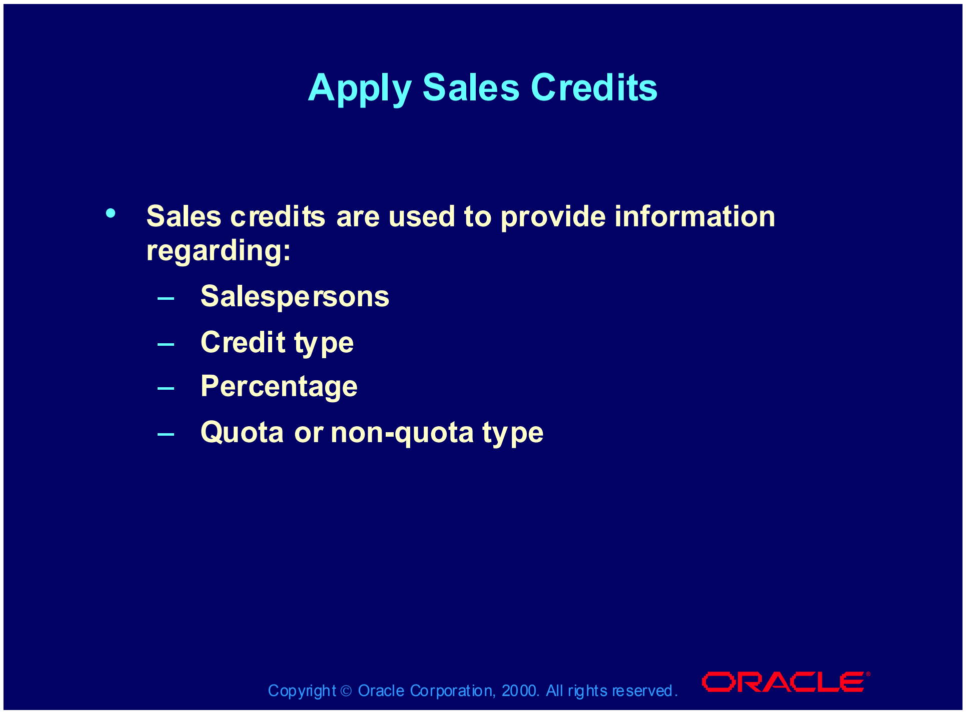
Decimal Quantities



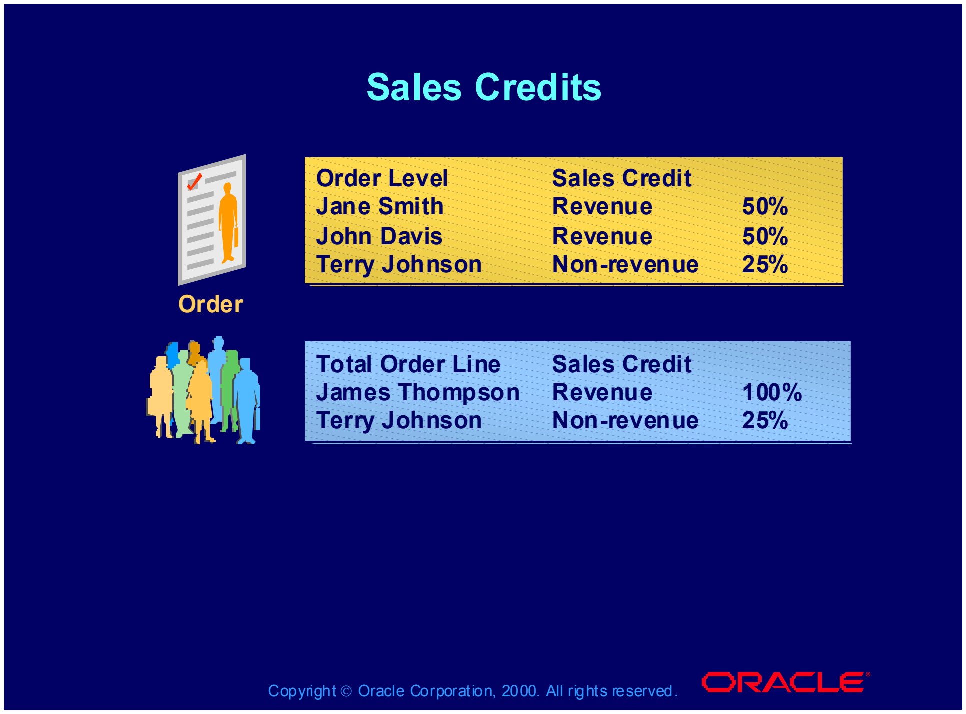
Attachments

- OM contains a profile option to automatically apply based upon established criteria
- Users can manually create one time attachments
- Attachments can be of all data types, including graphics, Web pages and documents
- Attachments are available for print on customized

Apply Sales Credits



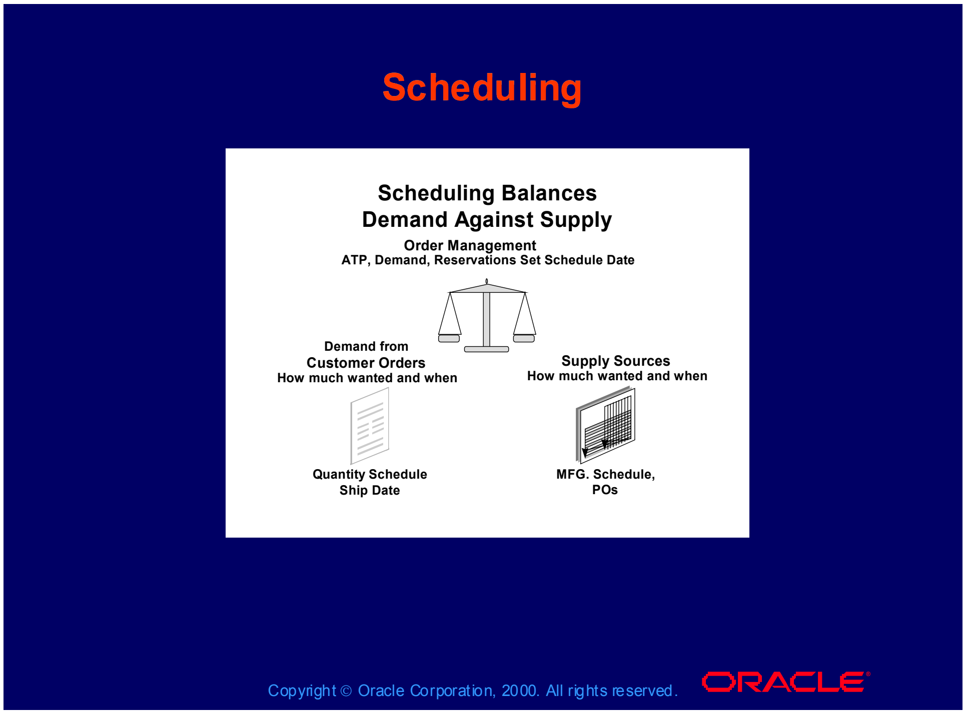
Sales Credits



Applying Credits

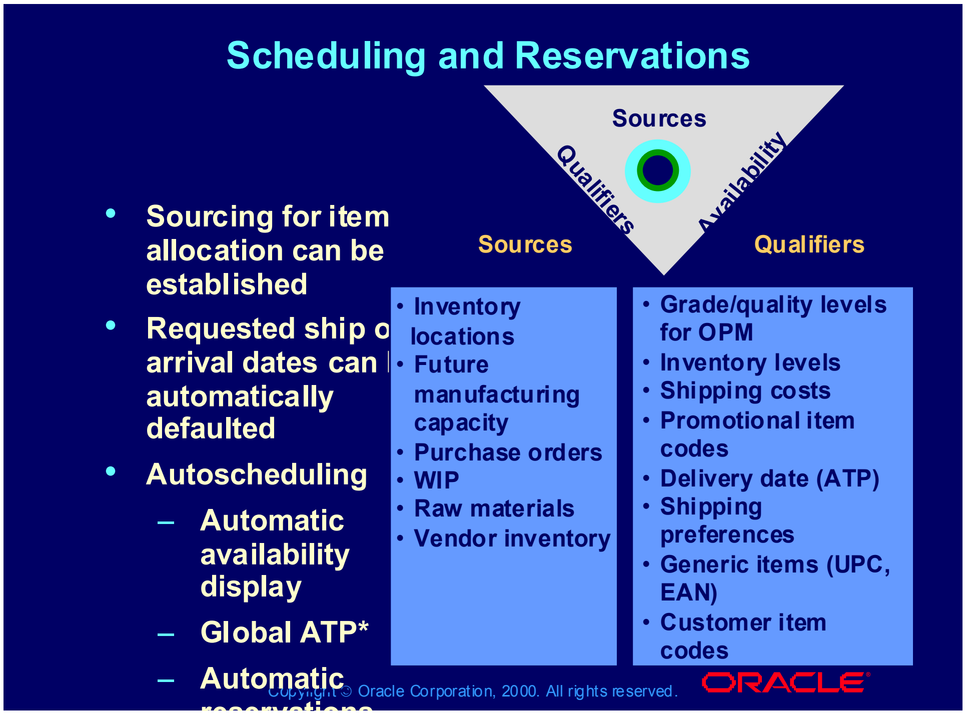
You can apply sales credits for an order, line, shipment schedule, or return. Sales credit information for a model line defaults to each option line.

Sales credits are revenue and or nonrevenue based. If a salesperson is required, Sales Credit information will default from the Salesperson. You can assign sales credits to salespersons other than the defaulting salesperson for the order. You must enter revenue credits totaling 100% in this window by the time you book the order , if a salesperson is required. You can enter nonrevenue sales credit in any percentage.



Order Scheduling

Scheduling is a communication tool between Oracle Order Management/Shipping and Manufacturing that helps users balance customer demands against the ability of a company to supply that demand. There are several situations that require communication with Manufacturing or Distribution when taking customer orders.


Scheduling and Reservations
Sources
Qualifiers
Availability
Sources
Qualifiers
Sourcing for item allocation can be established
Requested ship o
arrival dates can
automatically defaulted
Autoscheduling
Automatic availability display
Global ATP*
Automatic
Inventory locations
Future manufacturing capacity
Purchase orders
WIP
Raw materials
Vendor inventory
Grade/quality levels for OPM
Inventory levels
Shipping costs
Promotional item codes
Delivery date (ATP)
Shipping preferences
Generic items (UPC, EAN)
Customer item codes
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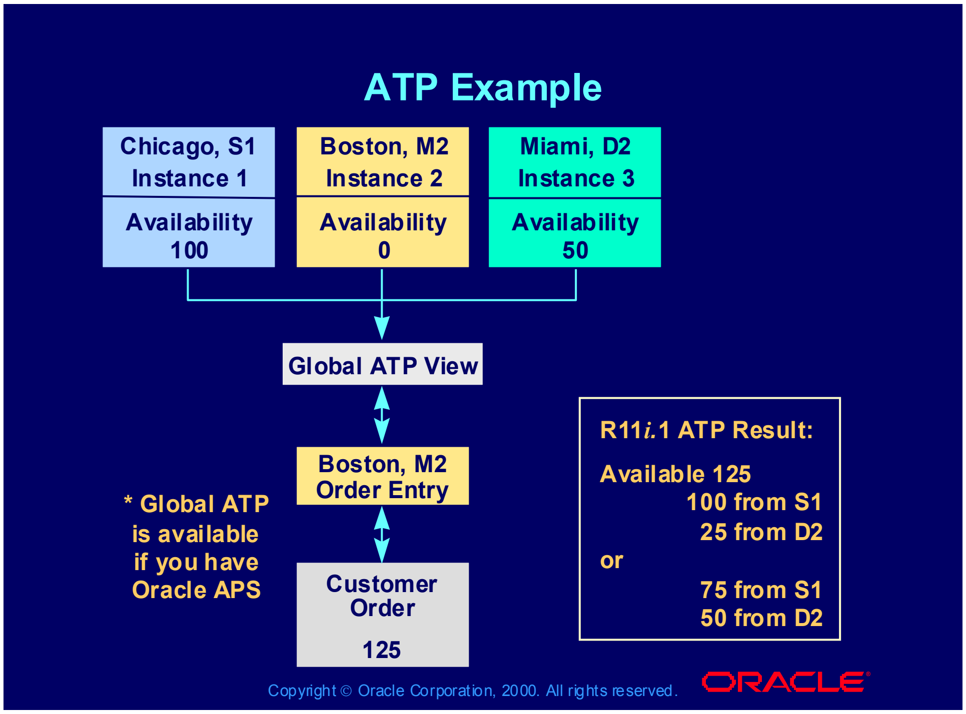
ATP Example


ATP Example
Chicago, S1
Instance 1
Availability
100
Boston, M2
Instance 2
Availability
0
Miami, D2
Instance 3
Availability
50
Global ATP View
Boston, M2
Order Entry
Customer
Order
125
* Global ATP
is available
if you have
Oracle APS
R11*i*.1 ATP Result:
Available 125
100 from S1
25 from D2
or
75 from S1
50 from D2
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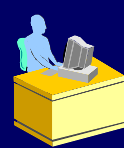
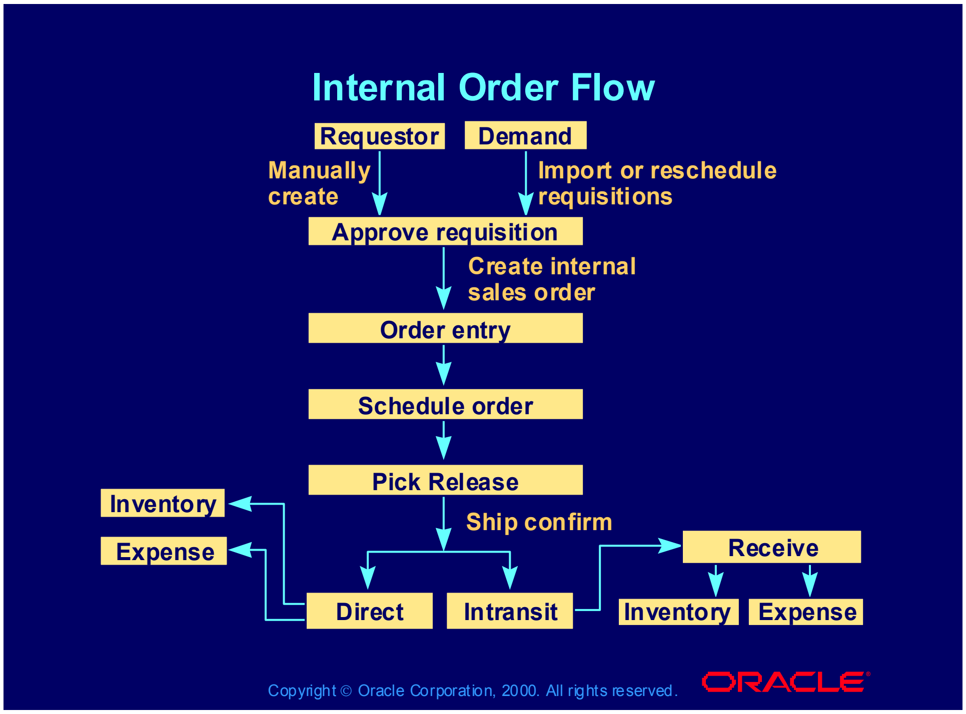
Internal Orders

- Support item transfers by order fulfillment within organizations
- Changes allowed after order confirmation include:
  – Carrier and Shipment Method
  – Scheduled Ship Date
  – Scheduled Arrival Date
  – Line Splitting
  – Cancellation

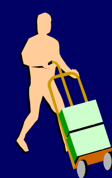


Internal Order Flow

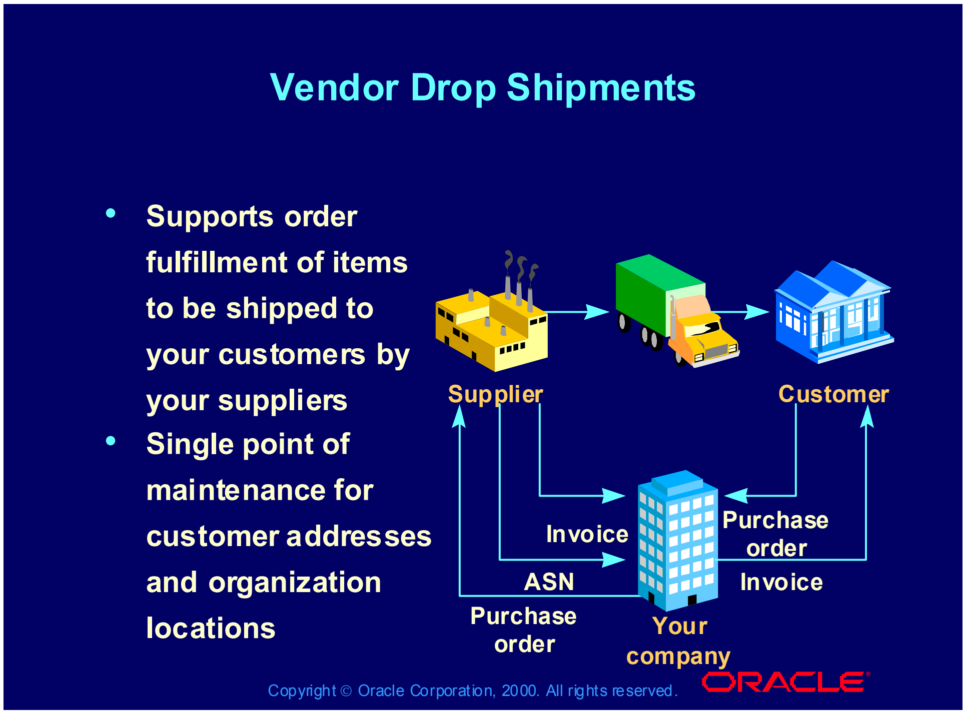


Returns

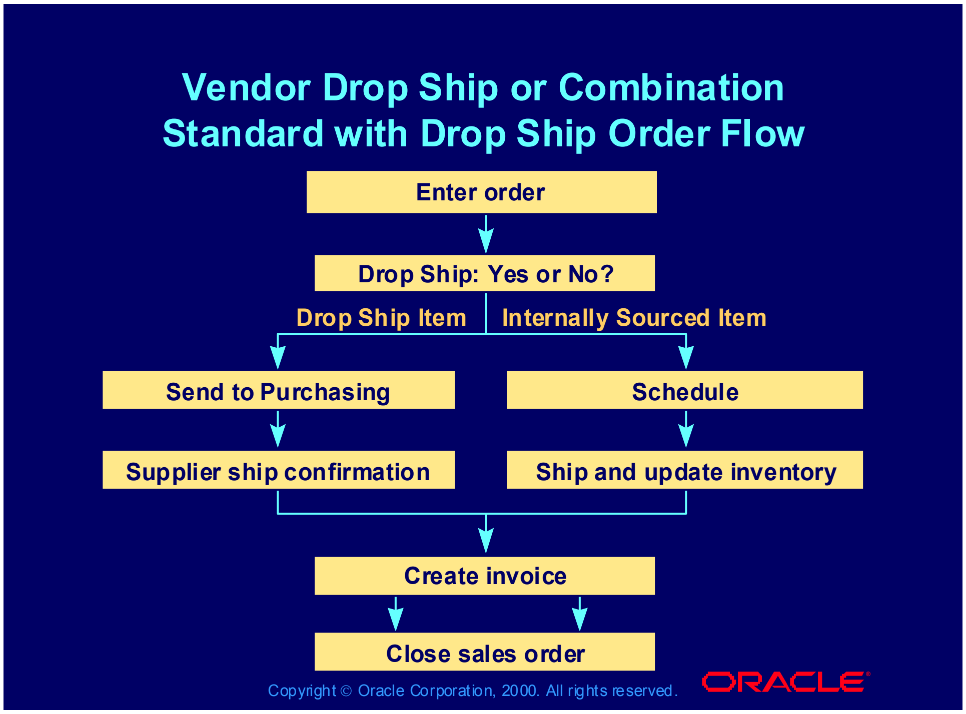
- Order and return lines on same order
- Common Receiving forms
- Record expected Serial/Lot numbers for informational purposes
- Acknowledgments print for returns



Vendor Drop Shipments



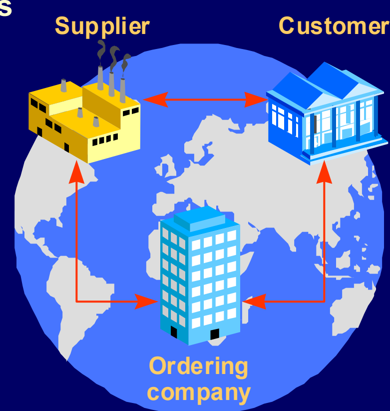
Vendor Drop Ship or Combination Standard with Drop Ship Order Flow



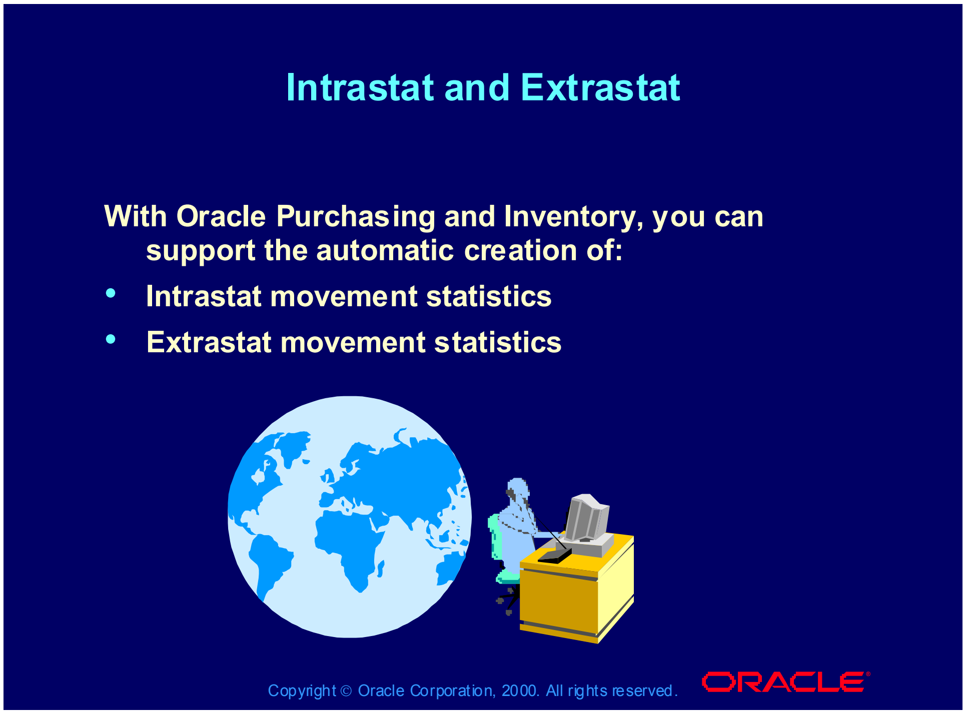
Tax Triangulation

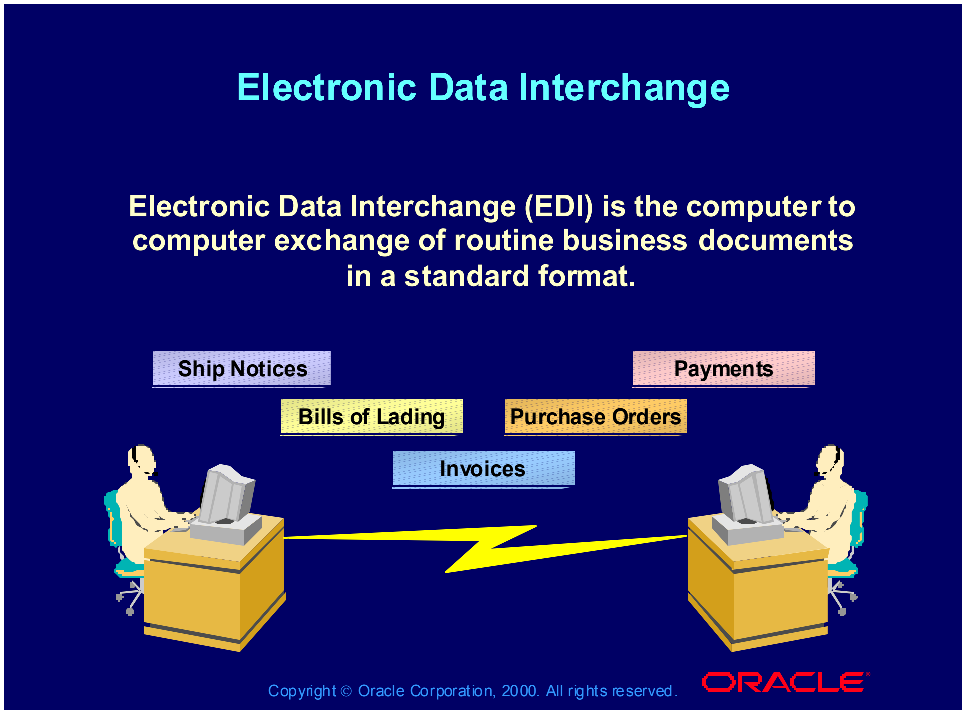
Tax Triangulation

- Calculates tax amounts for cross-border international shipments
- Tax can be based on:
  - Ship-to
  - Ship-from
  - FOB
  - Point of order origin
  - Point of order acceptance



Intrastat and Extrastat




Electronic Data Interchange
Electronic Data Interchange (EDI) is the computer to computer exchange of routine business documents in a standard format.
Ship Notices
Payments
Bills of Lading
Purchase Orders
Invoices
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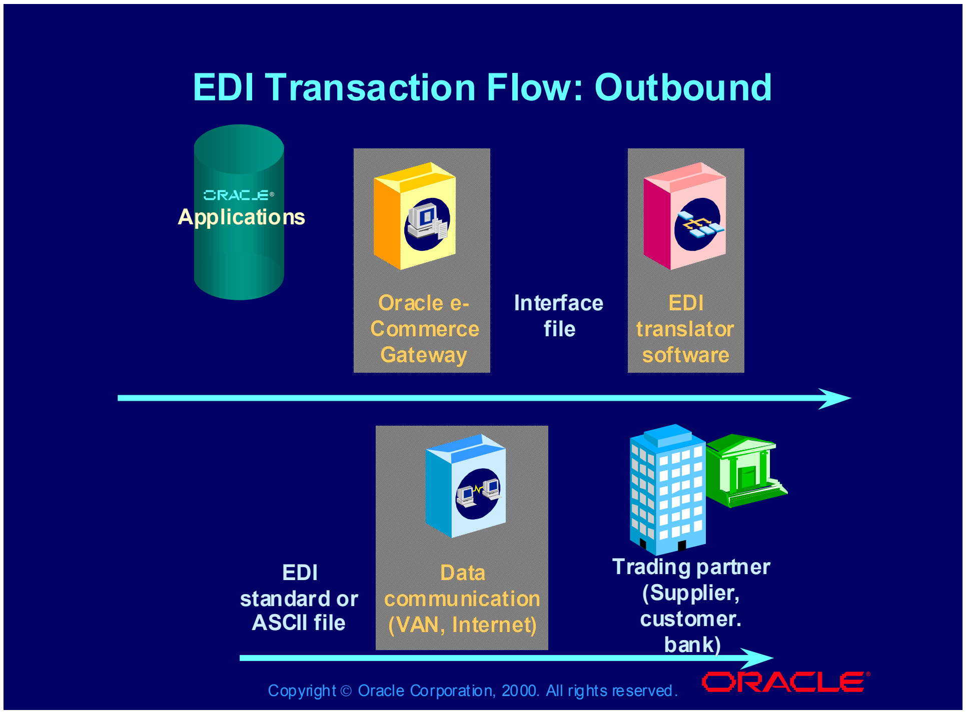
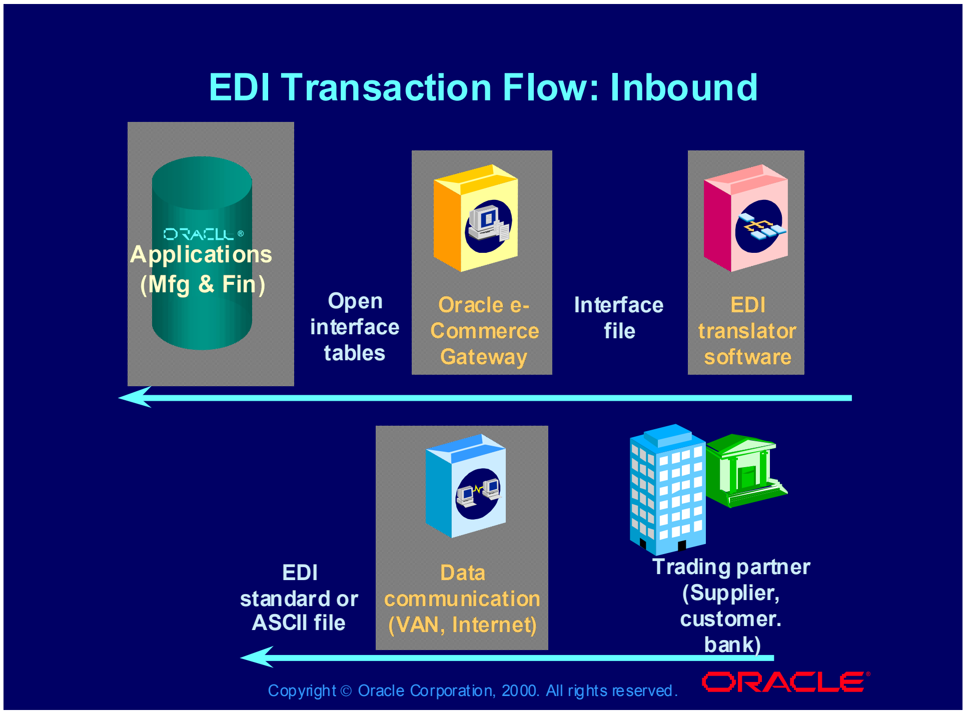
EDI Transaction Flow: Outbound



EDI Transaction Flow: Inbound



Workflow

Workflow

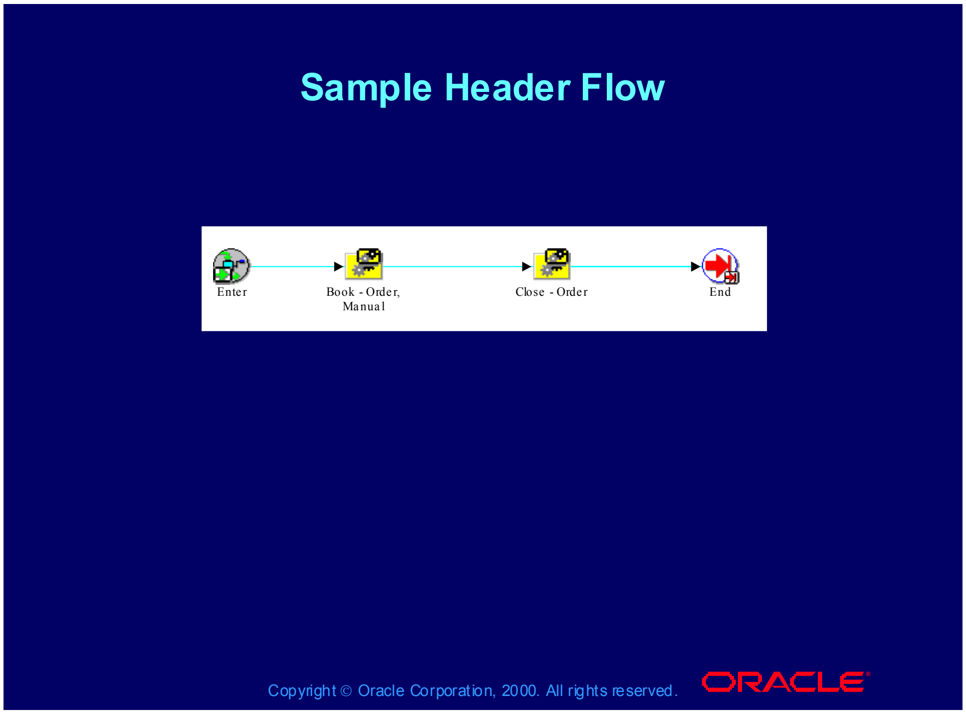
- Order Management is seeded with Workflows
- which control order processing
- You can view order flow status using the graphical Workflow Monitor

Workflows

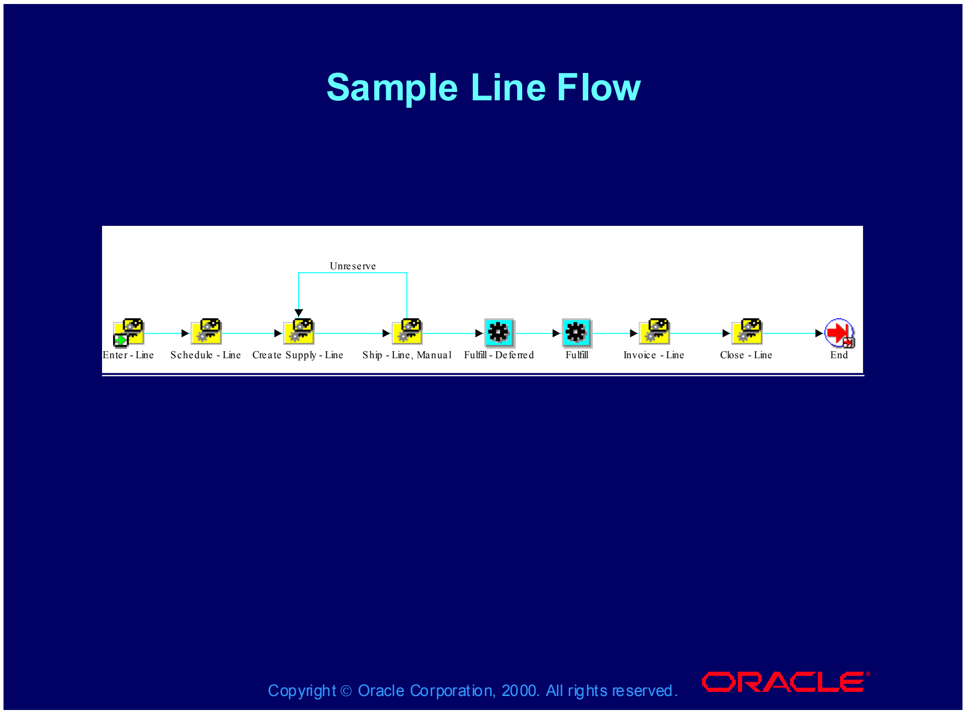
Workflows

- The Workflows control the order header and the line processing. Order types and line types must be set up as follows:
  - Header flows must be attached to the order type
  - Line flows must be attached to an order type, line type, and item type combination
- Each line can follow a different flow
- You can have outbound and inbound lines on the same order

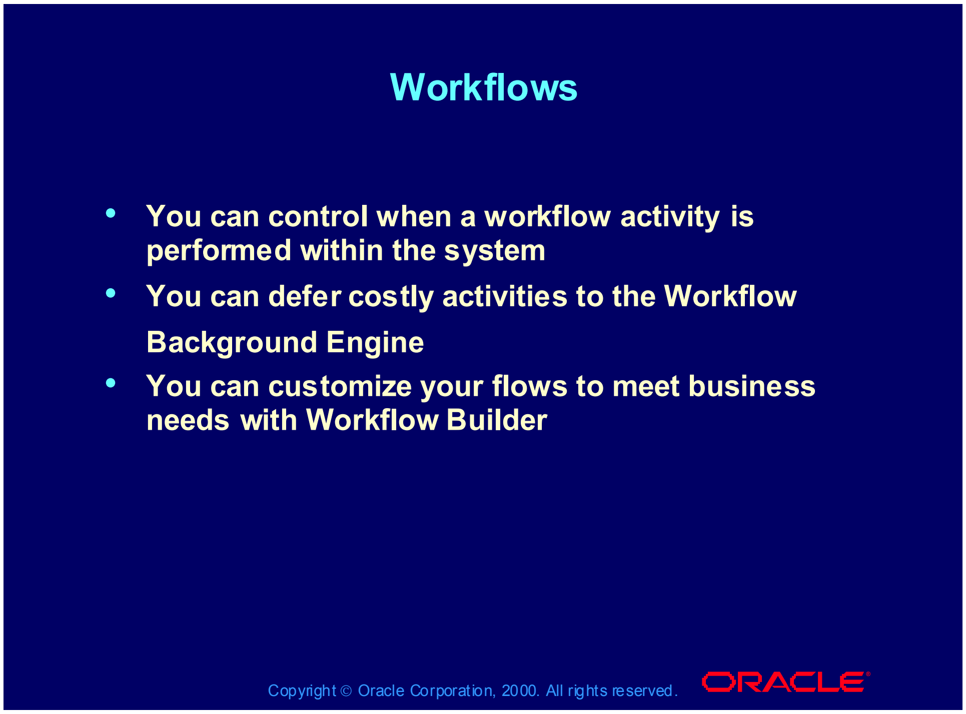
Sample Header Flow



Sample Line Flow



Workflows


Workflows
• You can control when a workflow activity is performed within the system
• You can defer costly activities to the Workflow Background Engine
• You can customize your flows to meet business needs with Workflow Builder
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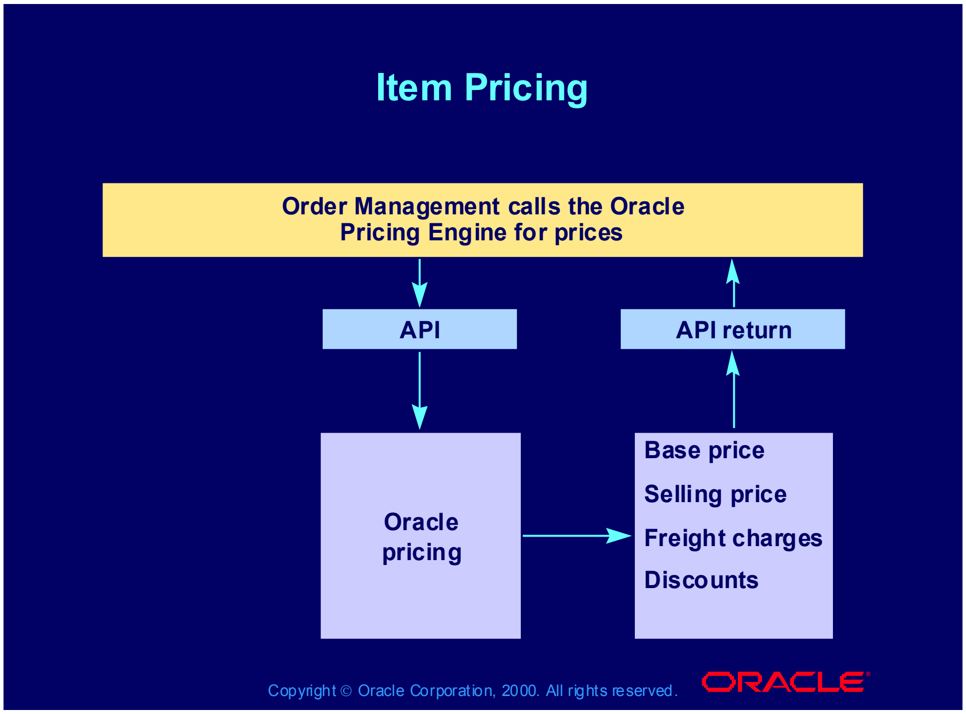
Item Pricing



Pricing

- Through Order Order Management, you can:
  - Set up price lists
  - Define pricing attributes
  - Copy and adjust price lists
  - Set Government Service Administration (GSA) pricing
  - Define pricing formulas
  - Set up modifiers so you can adjust prices, have freight and special charges and surcharges
  - Set up limited qualifiers

Advanced Pricing

If you purchase Oracle Advanced Pricing, you can do all the functions listed previously plus much more. You can also:

- **Have an unlimited number of:**
  - **Secondary price lists**
  - **Pricing attributes**
  - **Qualifiers**
- **Set up dynamic formulas as well as static**
- **Define qualifier groups and attribute mapping**
- **Set up promotions and deals**
- **Set points and ranges for price breaks**

Advanced Pricing Terms

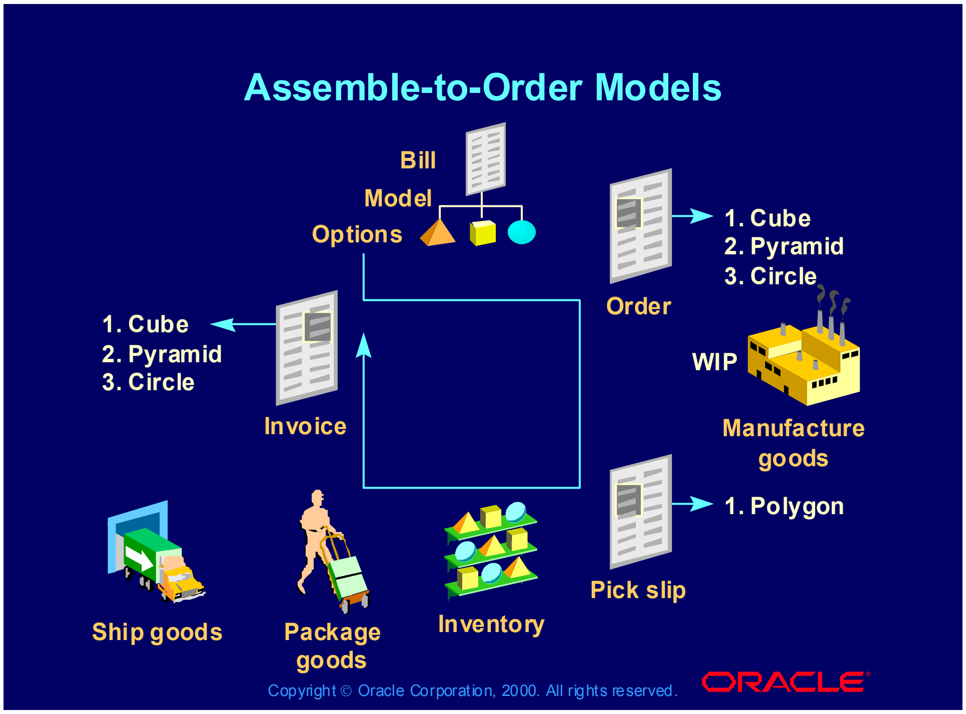
- Qualifiers: control who is eligible for certain prices (price lists), price adjustments, and benefits (modifiers)
- Attributes: control what product or service is being priced or modified
- Price lists: list of items with prices
- Formulas: determine prices or modifiers based on a formula or combination of factors
- Modifiers: determine how pricing requests and lines are adjusted, for example: discounts reduce the price by a fixed amount or percentage

Agenda

- Order to Invoice Process
- Managing customers
- Entering and importing orders and returns
- Configuring orders (CTO, ATO, and PTO)
- Managing orders
- Managing quotes
- Setting up and implementation

Configurator

- The Oracle Configurator is an add-on product in OM which enables you to use bills of material and establish rules to configure-to-order (CTO) and validate option choices.
- Customers may select from these options when ordering product.
- You can select options with an assemble-to-order (ATO) or a pick-to-order (PTO) bill of material (BOM) even if you don’t purchase the Oracle Configurator.
- Pricing and available to promise capabilities are provided during the configuration process.


Assemble-to-Order Models
Bill
Model
Options
1. Cube
2. Pyramid
3. Circle
Order
1. Cube
2. Pyramid
3. Circle
Invoice
WIP
Manufacture goods
1. Polygon
Pick slip
Ship goods
Package goods
Inventory
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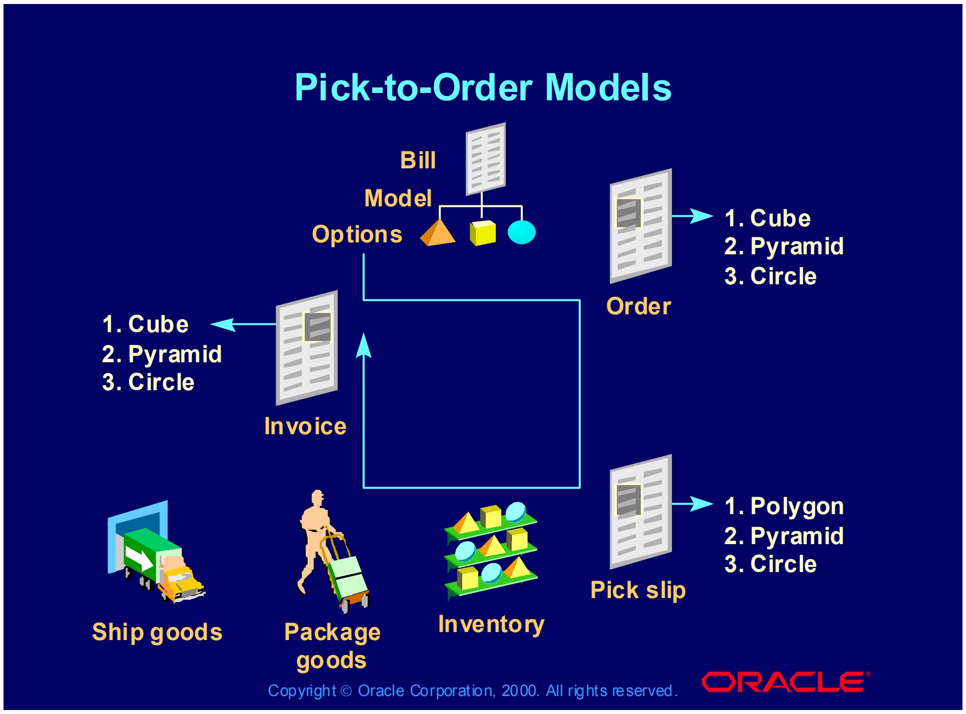
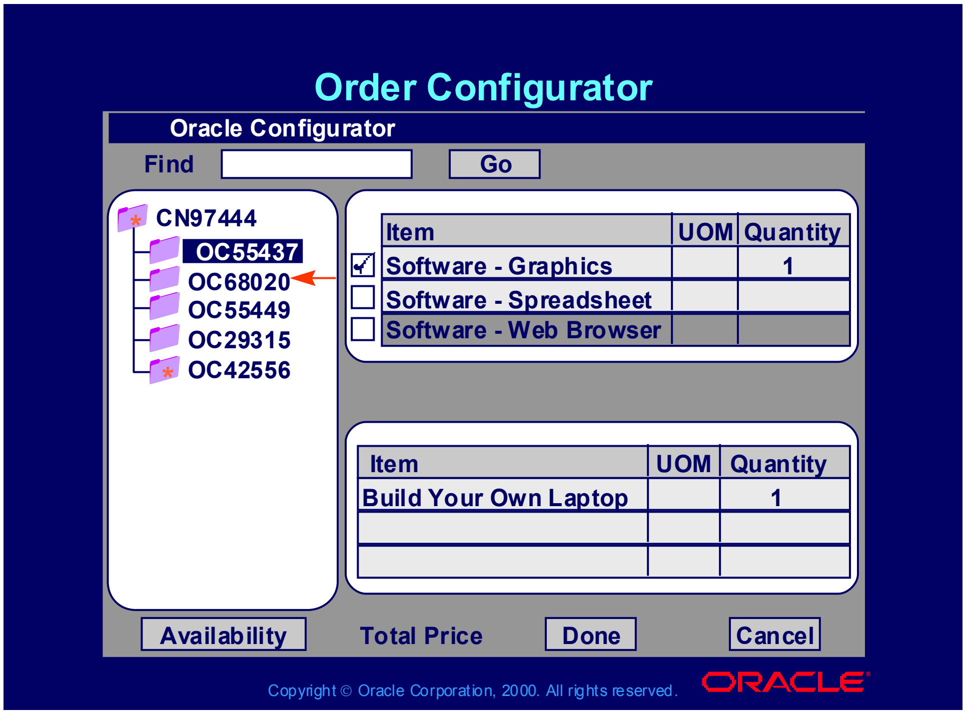
Pick-to-Order Models



Order Configurator



Agenda

Agenda

- Order to Invoice Process
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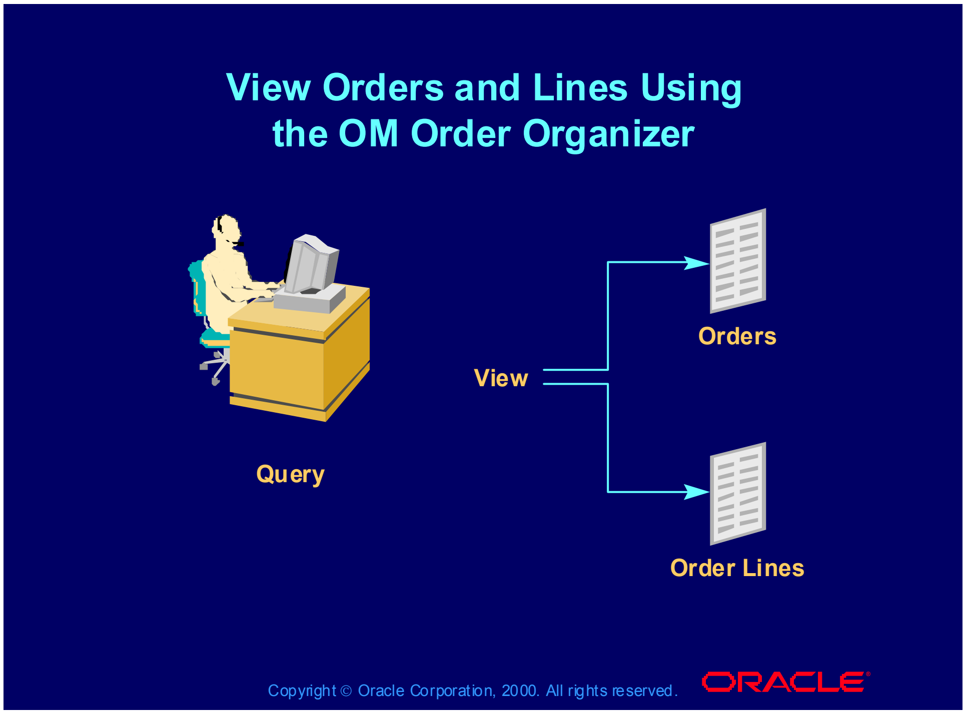
View Orders and Lines Using the OM Order Organizer



Order Organizer

Order Organizer

Order Organizer

The Order Organizer:

- Is a form you can use to singularly or mass view and change orders and lines.
- Is a folder form so you can move, hide, rename, and rearrange the fields.
- Displays the Navigator Tree on the left side.

  Note: The Navigator Tree is a set of user-defined folders so you can access your most commonly used orders, returns, or lines.

Viewing Order Information

Select the tab in the Order Organizer which holds the order information you require:

- **Holds: hold history**
- **Deliveries: delivery information**
- **Invoicing: invoicing information**
- **Quantity History: quantity history**

Three Ways to Stop an Order

Three Ways to Stop an Order

- **Do not respond to a workflow notification: The order or order line does not continue processing.**
- **Appy holds: temporarily stops a group of orders, an individual order, or individual order lines. You can both automatically and manually apply and remove holds.**
- **Cancel: Permanently stops an order or order lines.**

Notifications

- Notifications either alert individuals to a situation or ask individuals to perform an action, for example, an approval.
- The workflow engine sends notifications to both external and internal individuals.
- When accessing your notifications, you can:
  - Specify criteria with which to search them, for example, status, type, subject, sent, due, priority, if delegated.
  - View the details of each notification.
  - If requested by the notification, perform an action, for example, reply to the notification or forward the notification to another individual.

Process Messages

Process Messages

- When errors occur during order processes, for example, order import and order booking, the workflow engine generates messages.
- View all of your messages in the View Messages window.   Use the Find window to search them.
- View the message details in the Process Messages window and delete them or forward them.

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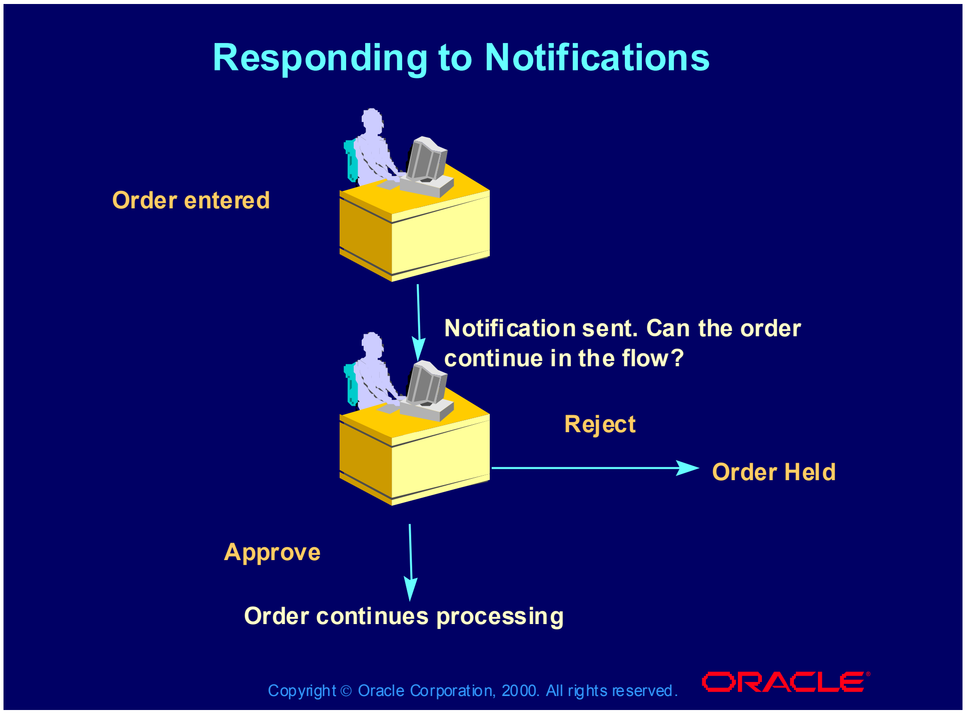
Responding to Notifications



Responding to Notifications

- **Processing constraints control who can move orders forward.**
- **Click one of the following manual approval actions to move orders or lines forward:**
  - **Progress Orders**
  - **Resume Workflow process**
  - **Retry**
  - **Reassign**

Comparing Notifications and Holds

Comparing Notifications and Holds

- Notifications
  - Placed on order headers and order lines by creating processes that stop and send notifications for action at certain points.
  - Removed when the person notified responds to the notification.
- Holds
  - Placed on order headers, order lines, customers, sites and items.
  - Stop an order anywhere in the order flow.
  - Removed manually at any time or automatically by setting up a hold until (expiration) date.

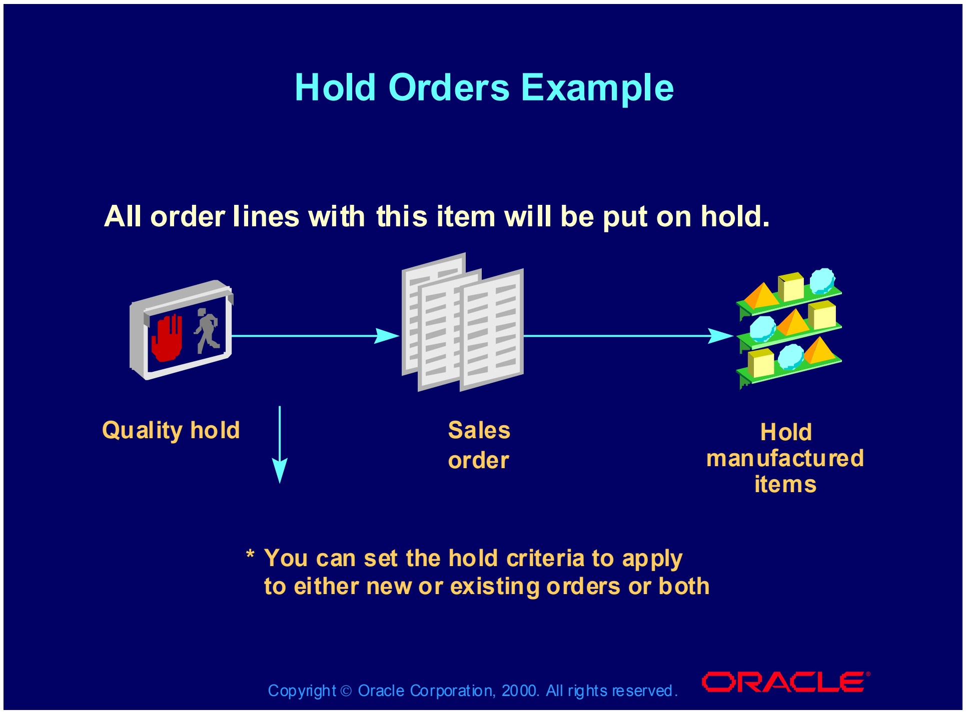
System Versus User-Defined Holds

System Versus User-Defined Holds

- System Holds Seeded:
  - GSA hold: best pricing for government customers
  - Credit hold: automatically puts order exceeding limits from processing through this flow.
- User-Defined:

  Manually set a hold using one or two criteria:
  - Order
  - Customer
  - Site
  - Item

Hold Orders Example



Releasing Holds

- Holds can be released either automatically or manually. You must be authorized to remove the hold.
- If you release a hold source or the established hold date is met, the hold is automatically removed for all new and existing orders, returns, and order lines.
- Date-specific holds can be removed manually prior to the hold-until date.
- You can multiselect multiple orders or lines to release the hold.

Changes

- You can change fields on an order based on the Processing Constraints setup.

  These constraints can be applied to a responsibility.
- You can do mass change from the Order Organizer for orders, returns, and lines.
- Pricing changes recall the Pricing Engine.
- You can also change your notes written in the Attachment.

Mass Change

Mass Change

- Using the Mass Change function, you can:
  - Change order attributes at the order or line level
  - Cancel or copy a set of orders or lines
  - Assign sales credits or discounts at the order or line level
  - Apply or release an order or a return hold

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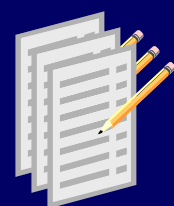
Cancellations

- **You can set up constraints to control when cancellations are allowed.**

  Cancellations can occur after pick release
- **You can cancel orders, returns, or lines**
- **Cancel either manually or by EDI and Order Import**
- **You can do mass cancellations from the Order Organizer**

Order Copy

- Copy directly from Sales Order form
- No more separate Copy Order form
- Copy selected lines only or copy multiple orders
- Append lines to existing order
- Keep prices the same as on copied lines or reprice at today's prices



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Agenda

Agenda

- Order to Invoice Process
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- Configuring orders (CTO, ATO, and PTO)
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Setup and Implementation

- Before you use Oracle Order Management, you must define business policies, various features, and defaults.
- You can do this by using:
  - Profile Options
  - Workflow
  - Processing Constraints
  - QuickCodes
  - Transaction Types
  - Attribute Controls
  - Defaulting Rules
  - Item Categories

Setup and Implementation

- You will also need to set up:
  - Inventory items and item relationships
  - Bills of Materials for ATO and PTO items
  - Customer Items
  - Catalog groups
  - Tax information
  - Price lists and pricing modifiers, qualifiers, and formulas
  - Credit check processes
  - Any other options you require

Reports

- There are many standard reports available in Oracle Order Management.
- You can use these reports to help you manage your business requirements.
- There are several categories of reports useful in managing the order process.
  - Setup related
  - Order related
  - Credit order related
  - Exception
  - Administrative

Summary

Summary

- In this module, you should have learned how to define the order management process by:
  - Entering customer information
  - Entering and importing orders and returns
  - Using the Oracle Configuration function
  - Managing Orders
  - Performing the setup and implementation for the order management processing requirements

Manage Customers

Chapter 2

Manage Customers

Oracle Order Management Release 11*i*

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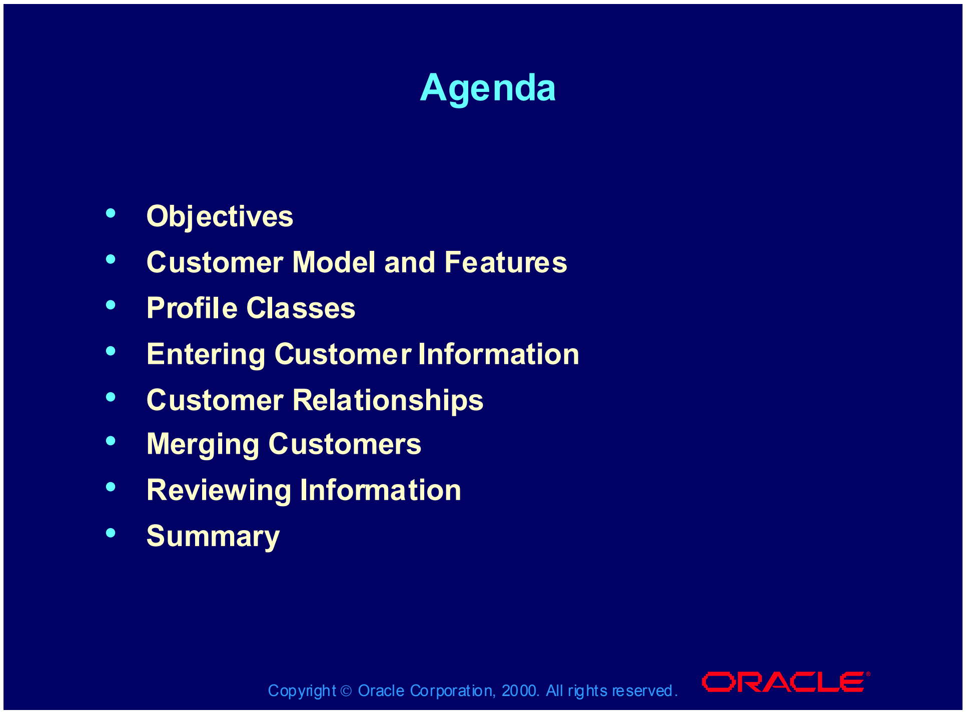
Agenda
• Objectives
• Customer Model and Features
• Profile Classes
• Entering Customer Information
• Customer Relationships
• Merging Customers
• Reviewing Information
• Summary
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Agenda


Agenda
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• Reviewing Information
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Objectives

Objectives

After completing this course, you should be able to do the following:

- Define the features enabling you to enter and maintain customer information
- Create customer profile classes and assign them to customers
- Create and maintain customer information
- Enable related customers to establish reciprocal payment and contract terms
- Merge customers and eliminate any duplicate customer information
- Define how to view customer information

Agenda

- Objectives
- **Customer Model and Features**
- Profile Classes
- Entering Customer Information
- Customer Relationships
- Merging Customers
- Reviewing Information
- Summary

Using Oracle Applications Help

1. Navigate to the Oracle Applications Navigator.
2. Select Help—>Window Help from the menu bar. The Oracle Applications Help window is displayed.
3. Enter your search criteria, enclosed within quotation marks, in the Help field and click Find. Oracle Applications Help displays a list of topics that meet your search criteria.
4. Click a topic to view detailed information.

Note: Click Search Instructions for help with searching Oracle Applications Help.

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Using Oracle Applications Help Within a Window

1. Open a window in the application you are using.
2. Select Help—>Window Help from the menu bar. Oracle Applications Help displays detailed information about the window you opened, including step-by-step instructions for entering information in each field in the window.

Practice

Practice

Enter People

This lab is performed so you may enter yourself as an employee in the system. You will be leveraging this lab in future exercises.

User = Operations

Password = Welcome

Responsibility = Human Resources

(N) People - Enter and Maintain

Select the New Button

Last name = Yours

First Name = Yours

Gender = Yours

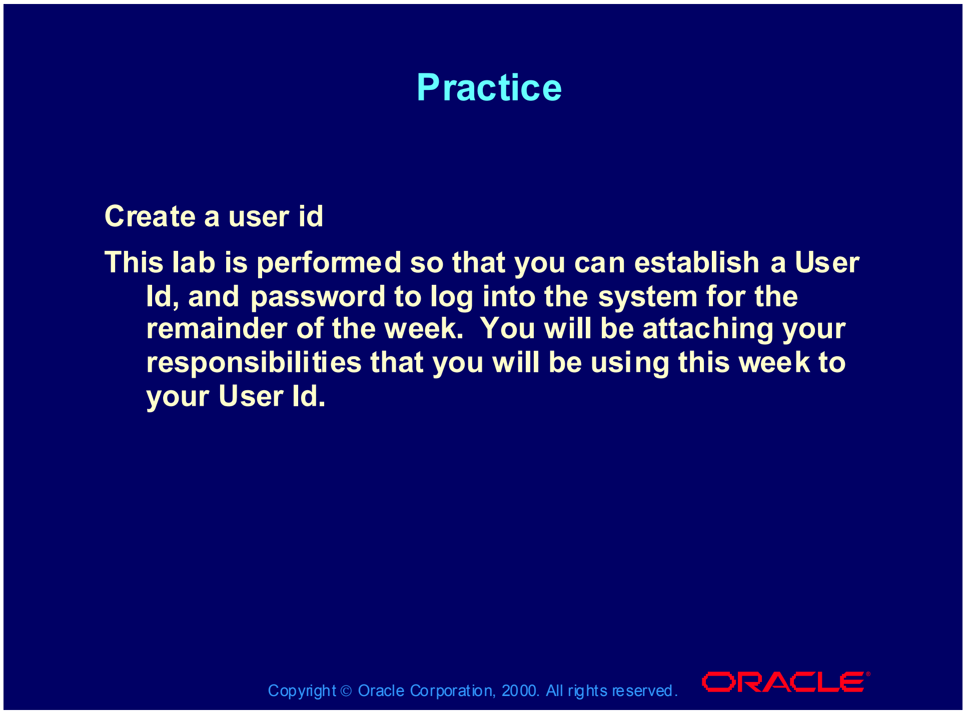
Type =employee

Social Security - Any number in this format (xxx-xx-xxxxx)

Date of Birth = Yours (real or not)

Save

Record your employee number __________



File Switch Responsibility

Responsibility = System Administer

(N) Security-user-define

Name = Any ID you want

Password = password (lower case)

Tab

Enter pass word again

Person = your Last name % select

Responsibilities Select the following Responsibilities from a List of Values

Order Management Superuser VISION OPERATIONS (USA)

Move cursor to next row

Purchasing Vision Operations (USA)

Move cursor to next row

Inventory VISION OPERATIONS (USA)

Move cursor to next row

Receivables VISION OPERATIONS (USA)

Move cursor to next row

Oracle Pricing Manager

Move cursor to next row

System Administrator

Save

File-Log in as a different user

User = Your user name

Password = password (lower case)

You will receive a message informing you that your password has expired, Select the OK button.

Enter in the following data

Old pass word = password

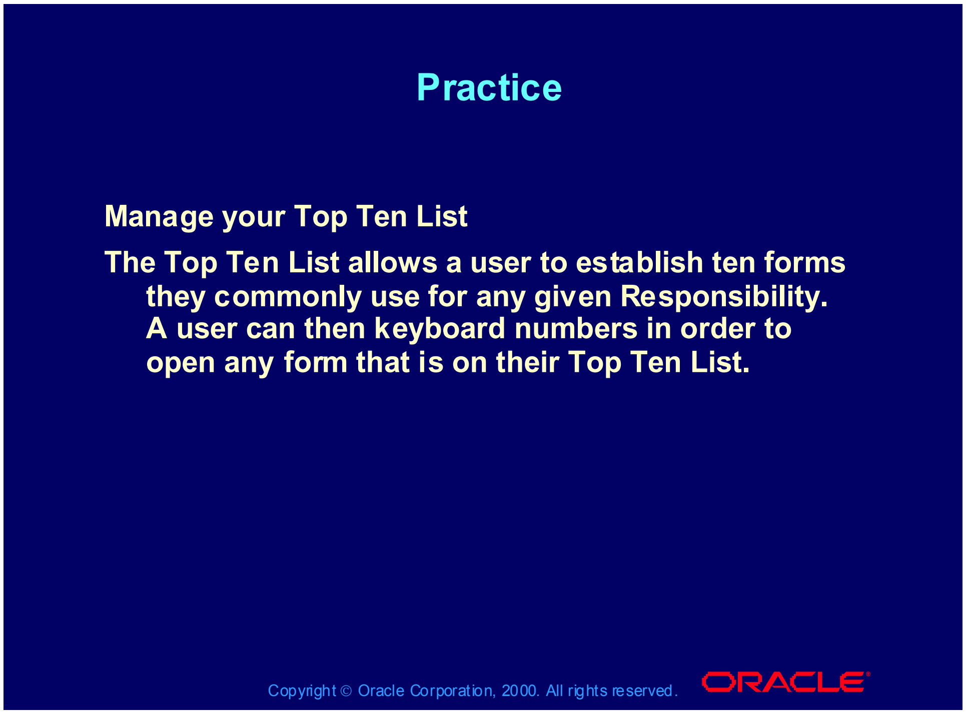
New password= Anything you want, Record it here in case you forget later

____

Re-enter password = Your new password.

Select Order Management Superuser Responsibility

Practice



Navigator

Expand all menu trees of the Order Management Responsibility

Move over the Following forms to your Top Ten list.

Order Organizer

Sales Orders

Release Sales Orders

Transactions

Customers Standard

Customers Quick

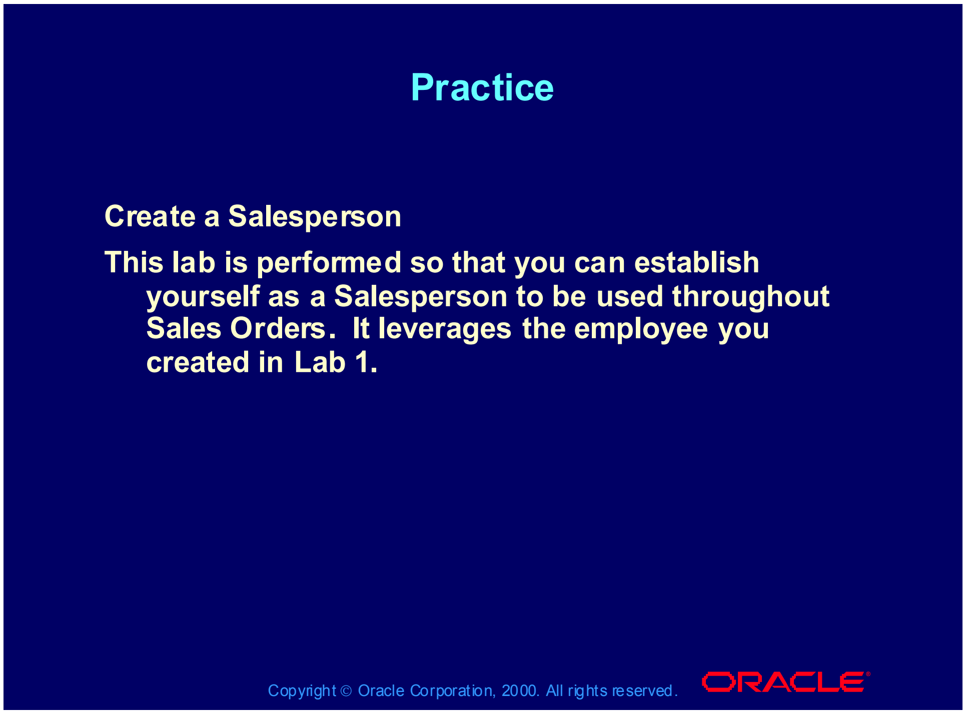
Price List

Master Items

Reports

Requests

Practice



(N) Set-up - Sales - Salesperson

Last name - Yours

Sales Group - Commercial sales

Sales Credit Type = Quota Sales Credit

Revenue Account Select LOV

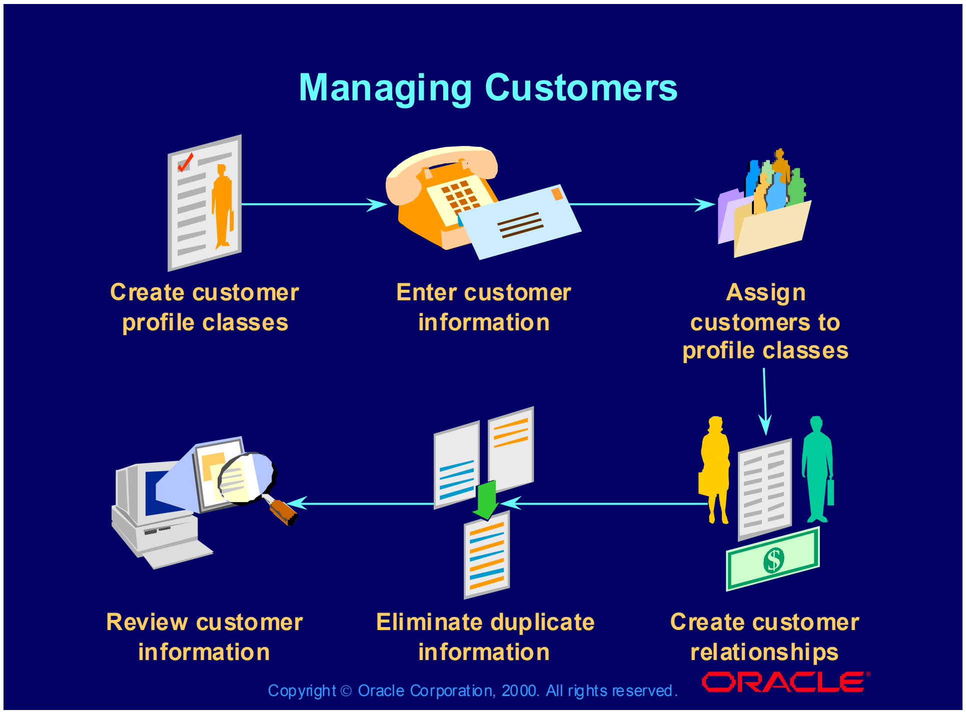
You now will be seeing a field asking for an Account Alias Select LOV

Choose Miscellaneous from the list.

Repeat for the Freight and Receivables account, or cut and paste the Misc. Account number

Save

Managing Customers

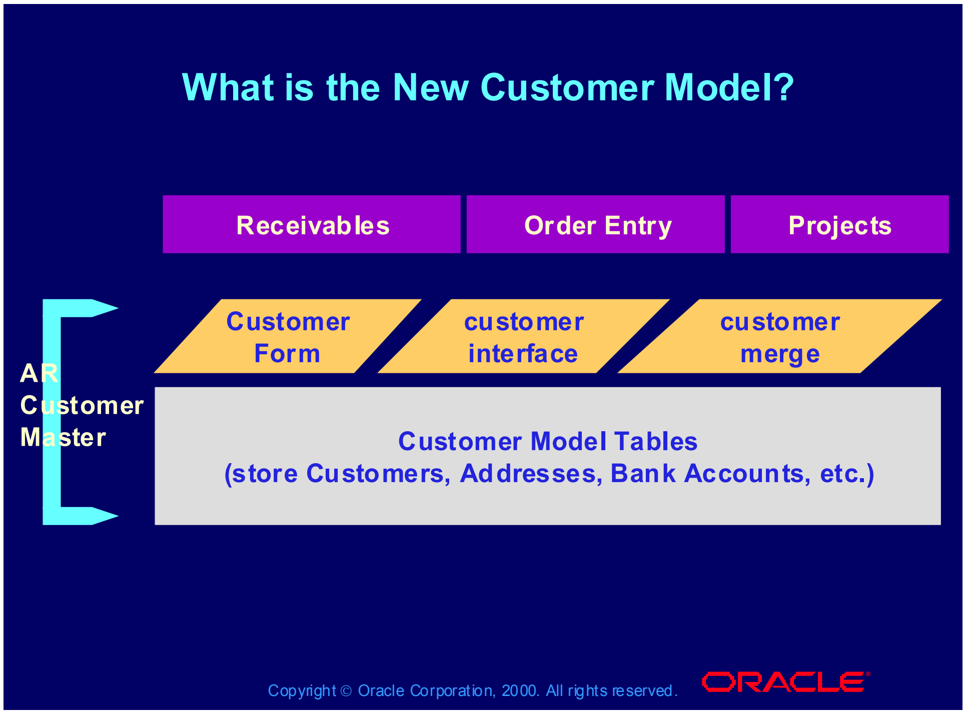


You can:

- Create customer profile classes and assign them to customers
- Create and maintain customer information
- Enter multiple ship-to sites for each customer
- Enable related customers to establish reciprocal payment and contract terms
- Review customer information online and in reports

The system will perform a search for your customer before it allows you to enter a new customer.

What is the New Customer Model?



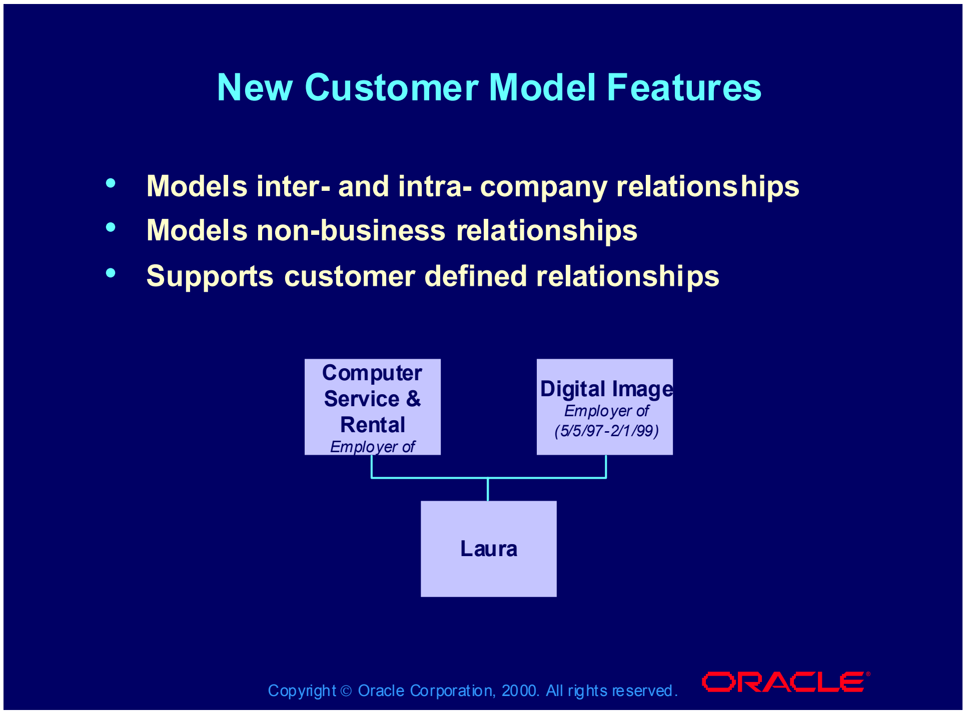
The customer model is part of Oracle Receivables. It has tables that store customer relationships and information about the people, organizations, and locations involved in those relationships.

You interact with the customer model through the following modules:

- Customer form: Online entry and query of customer information
- Customer interface: Batch load of customer information
- Customer merge: Merge customer accounts, usually after you've entered a customer incorrectly or in duplicate or due to a business consolidation.

New Customer Model Components

- Data model: Tables and attributes for modeling customers, organizations, people, and locations.
- Backwards-compatible views: Other Oracle Applications see the new customer model as an Oracle Applications Release 11 data model.
- PL/SQL APIs: Allows developers to use common business logic to update the customer master.
- Customer form, open interface, and merge function work with the new customer model.


New Customer Model Features
• Models inter- and intra- company relationships
• Models non-business relationships
• Supports customer defined relationships
Computer Service & Rental
Employer of
Digital Image
Employer of
(5/5/97-2/1/99)
Laura
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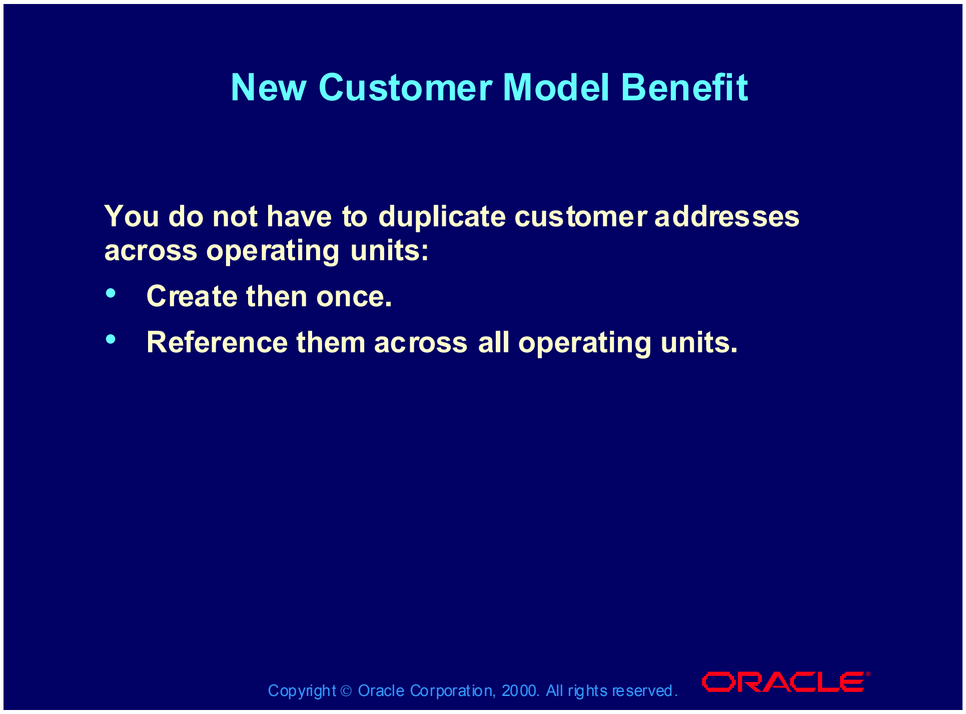
New Customer Model Benefit

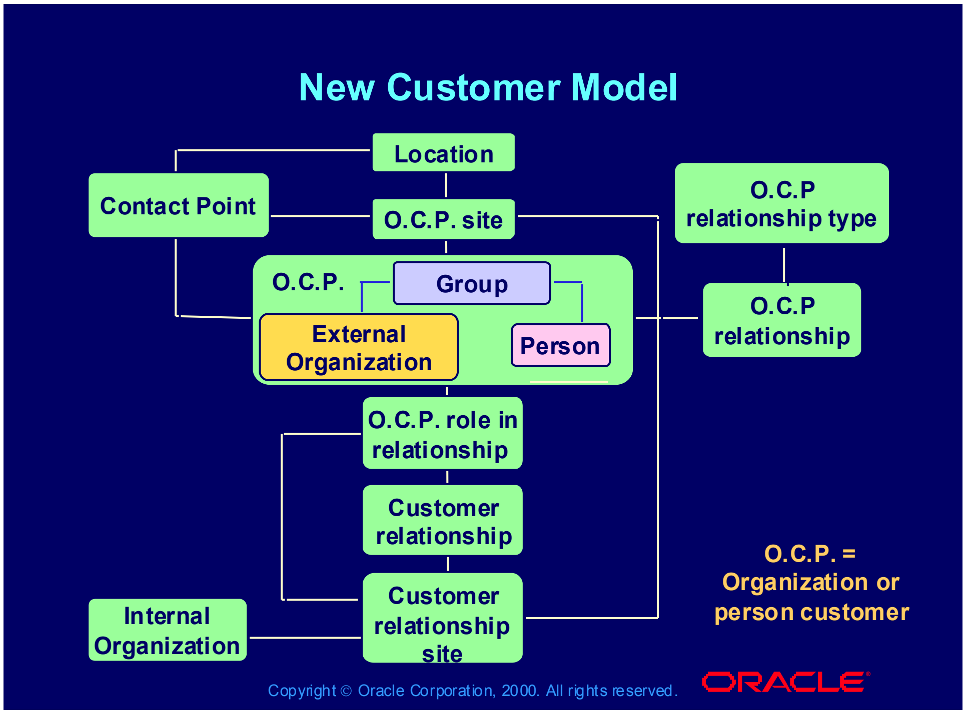


Entities of the New Customer Model

Entities of the New Customer Model

- **Organization or person customer: A unique set of truths about a person, organization, group, or relationship.**
- **Account: The financial rollup point from which to track the monetary portion of a customer's purchases and payments.**

New Customer Model



Organization or Person Customer Registry

- An organization or person customer is anything that can enter into business relationships with another organization or person customer.
- You can store information about your relationships in one “source of truth” representation of people and businesses.

Customer Addresses

Customer Addresses

- Allow multiple organization or person customers can do business at one location.
- Are global (not specific to operating units).
- Allow you to perform address validation using Vertex or TaxWare information.
- Have flexible address formatting with seeded and custom formats.


Organization or Person Customer Relationships
The registry stores information about relationships between organizations or person customers:
• Organizational hierarchies
• Business relationships, for example, partnerships
• Personal relationships, for example, marriage/partnership and parenthood
• Organization contacts
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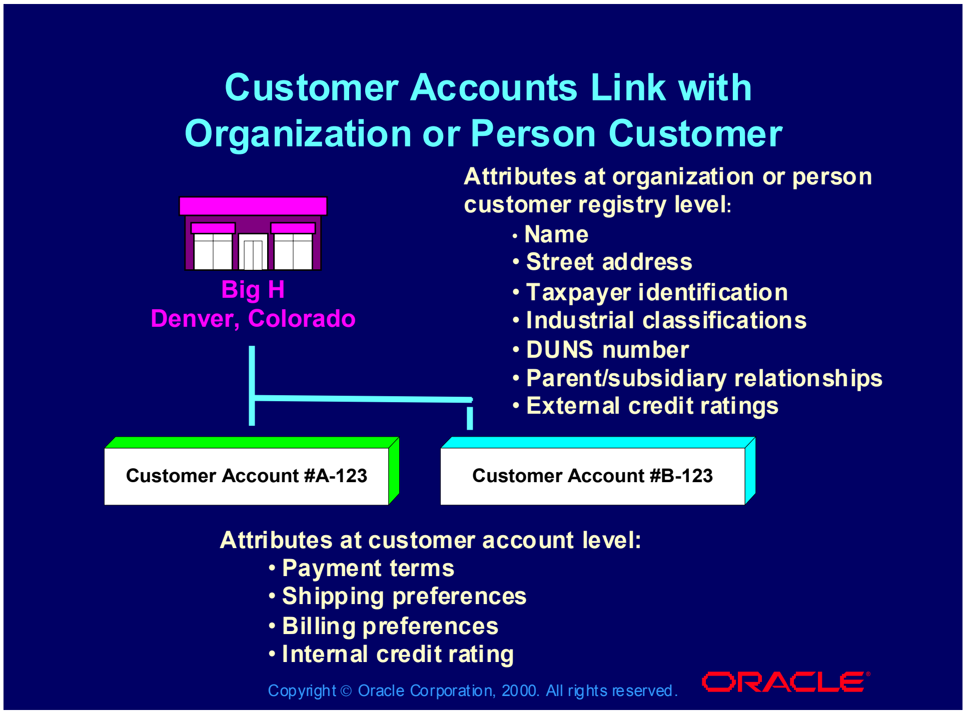
Customer Accounts

- Customer accounts model relationships between an organization deploying Oracle Applications and an organization or person customer stored in the new customer model registry.
- Additional organizations or person customers can play roles in accounts. The new account model retains release 11i customer model features including:
  – Credit profiles
  – Terms of relationship (for example, discount terms)
  – Customer bank accounts

Customer Accounts Link with Organization or Person Customer

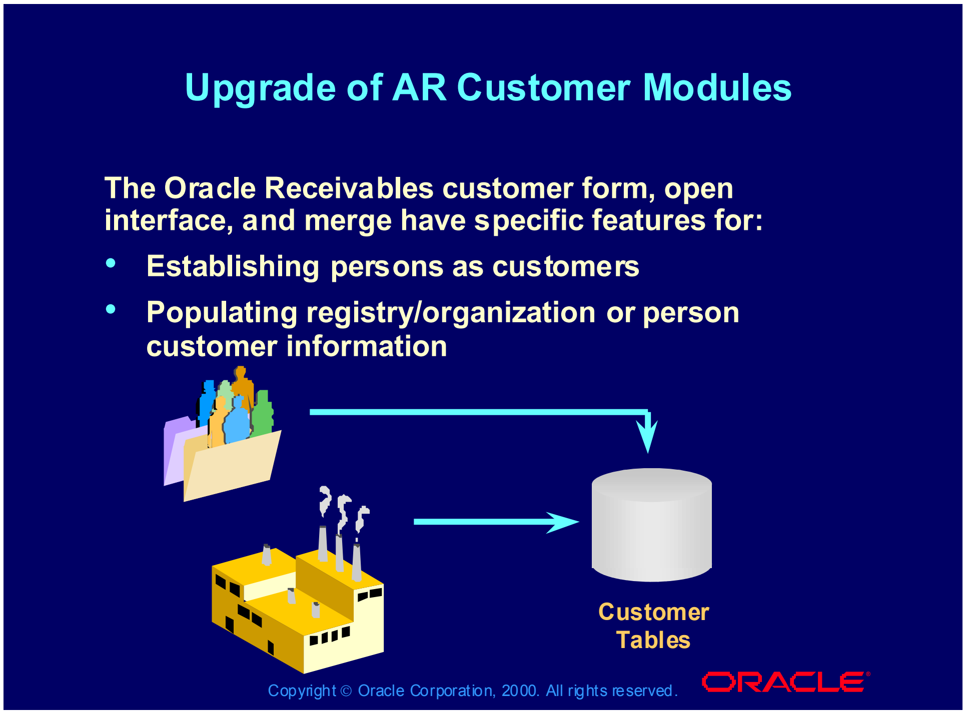


In release 11.1, information about a customer is not separated from information about the relationship with the customer. The new customer model separates information about the organization or person customer from the terms of the relationship.

Additionally, the new customer model allows you to establish multiple relationships (also known as customer accounts) with the same organization or person customer .

Addresses work in a similar fashion. You record an address for an organization or person once, then reference it within the customer account layer, through the Customer Account Site entity.

Upgrade of AR Customer Modules



Specific Features of Customer Management

- Customer form: Searches existing customers and the organization or person customer registry before allowing you to enter a new customer
- Customer merge
  - Merges customer accounts
  - Does not merge information in organization or person customer registry

Specific Features of Customer Management

- Customer interface
  - Loads customer accounts along with important organization or person customer information
  - Does not load organization or person customer information that is independent of customer accounts

Customer Form Flow

Customer Form Flow

- The Find/Enter Customers window displays to ensure that you search existing customers before you enter new customers
- You can search using the following methods:
  - Simple: Context search
  - Advanced (default): Detailed searches
  - Address: Address components
- After this process, the Customers - Standard form displays

This process assumes that the customer you are entering most likely exists in the database and operates as follows:

• The customer account search runs first and displays a customer accounts that match the query in an list of values.

• If you do not choose one of the matched customer accounts (or there are none), click New.

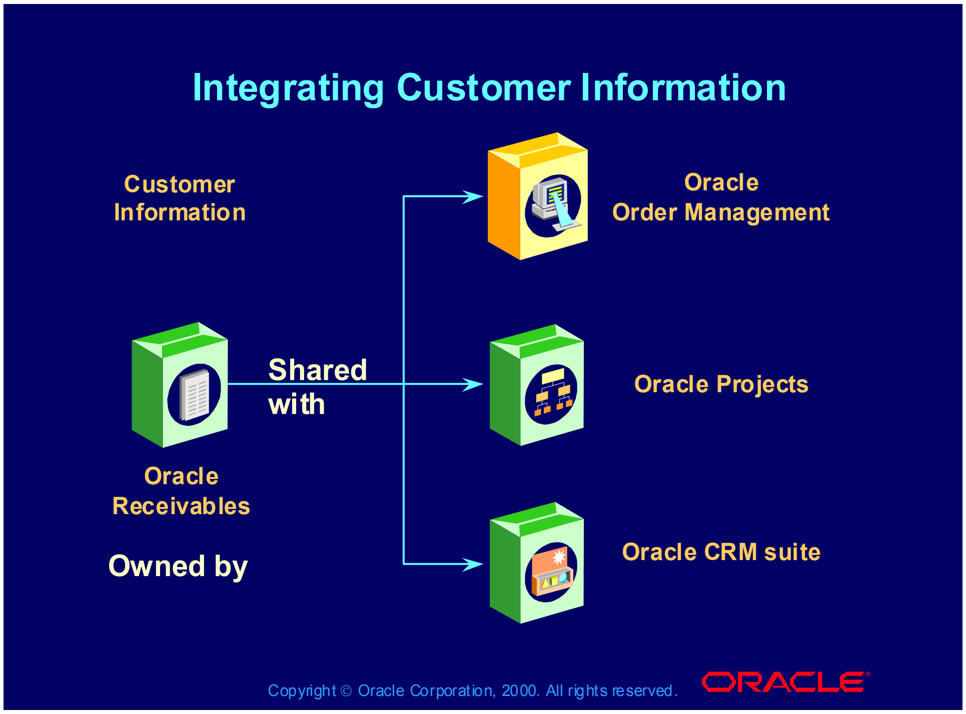
• Party Match checks for people or organizations who are not customers but who match the query criteria and displays in a list of values. This reduces customer merging caused by typographical errors.

•Search examples:

•Advanced: Category class, contacts, phone numbers

• Simple (context): Category of business, businesses in a location, specific business name

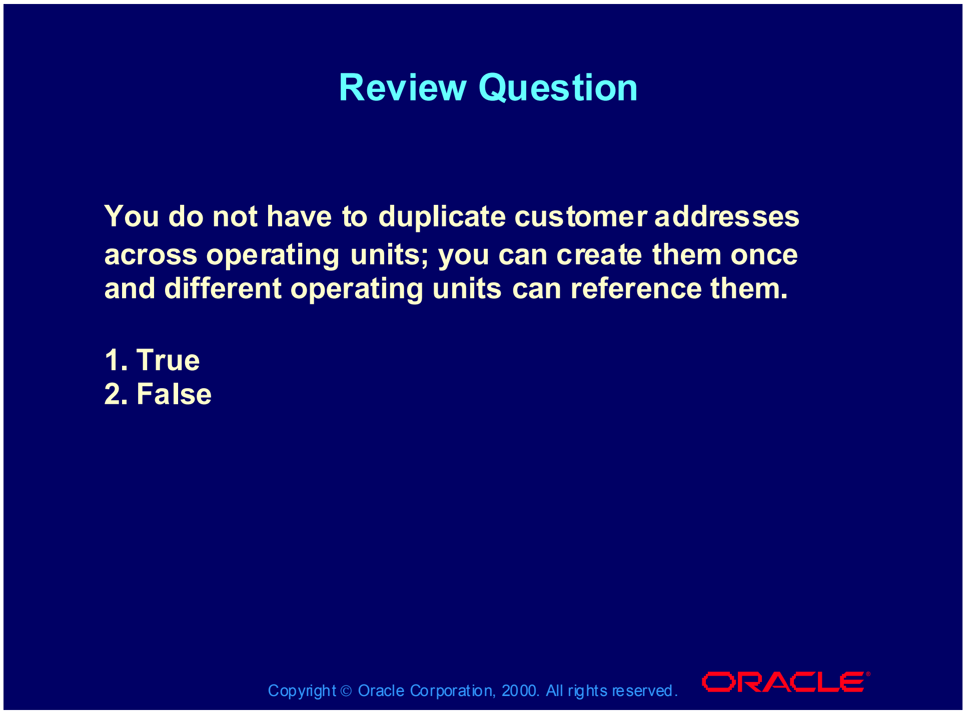
Integrating Customer Information



Enter or Import Customer Information

You can enter customer information directly into Oracle Receivables or import it through interface tables from other Oracle Applications.

Customer information is shared throughout Oracle Applications, however the tables for the Customer Master is owned by the Receivables module.


Review Question
You do not have to duplicate customer addresses across operating units; you can create them once and different operating units can reference them.
1. True
2. False
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Review Question

You do not have to duplicate customer addresses across operating units; you can create them once and different operating units can reference them.

1. True
2. False

Agenda

Agenda

- Objectives
- Customer Model and Features
- Profile Classes
- Entering Customer Information
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- Reviewing Information
- Summary

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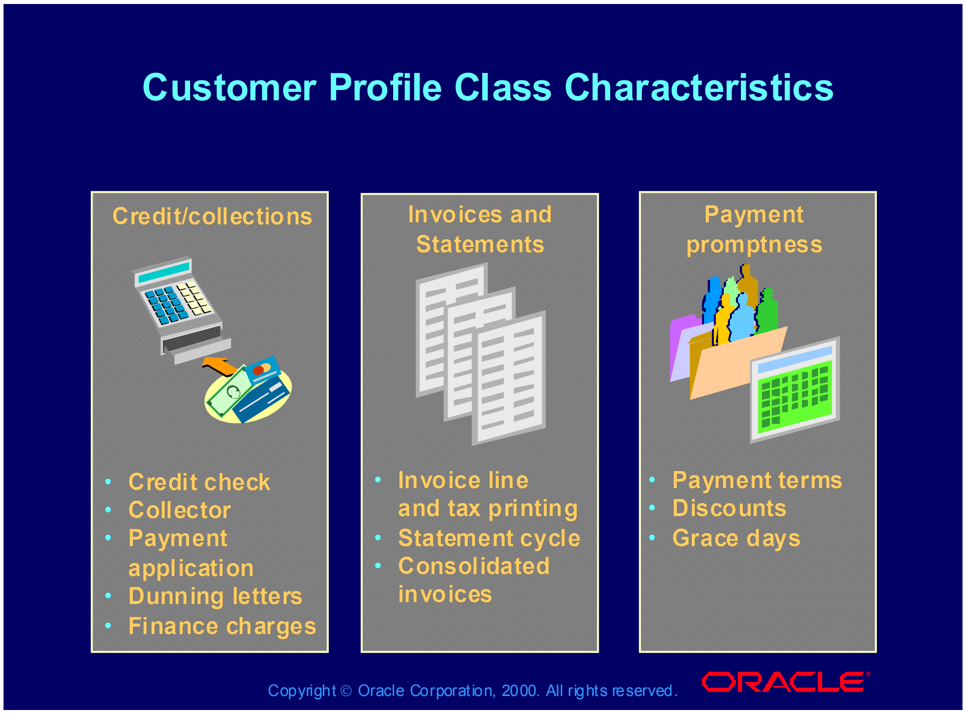
Profile Classes

Profile Classes

- You can use profile classes to describe and group customers with similar financial characteristics
- Use profile classes to enter new customers quickly and consistently

Customer Profile Class Characteristics



Creating Customer Profile Classes

To make the creation of new customers in Oracle Order Entry/Shipping/Oracle Receivables efficient, every customer must be assigned to a profile class. A profile class defines several default values for customers with similar credit terms and invoicing requirements. After a customer has been created, the default values can be modified based on the specific characteristics of that customer.

For example, you may want to create a profile class for small manufacturers, called Small MFG. Customers assigned to this profile class might require credit checks before orders will be fulfilled, given Net 30 payment terms, and receive quarterly statements. When creating a specific new customer, you could assign that customer to the Small MFG profile class. If the customer develops credit problems in the future, you might then modify that customer's payment terms to Cash On Delivery.

Managing Customer Profiles

- When you establish a customer, the customer processing function assigns it to the default (seeded) customer profile class.
- If you want to assign the customer to a different profile class, select it from the list of values before you save your work.

(N) Setup > Customers > Profile Classes

(Help) (N) Oracle Receivables > Customers > Defining Customer Profile Classes

Maintaining Profile Classes

Update Options

- **Oracle Order Management/Shipping lets you modify attributes in existing profile classes even after customers are assigned to them. However, when you try to save changes to any existing profile class, you must decide how you want the change to be applied.**

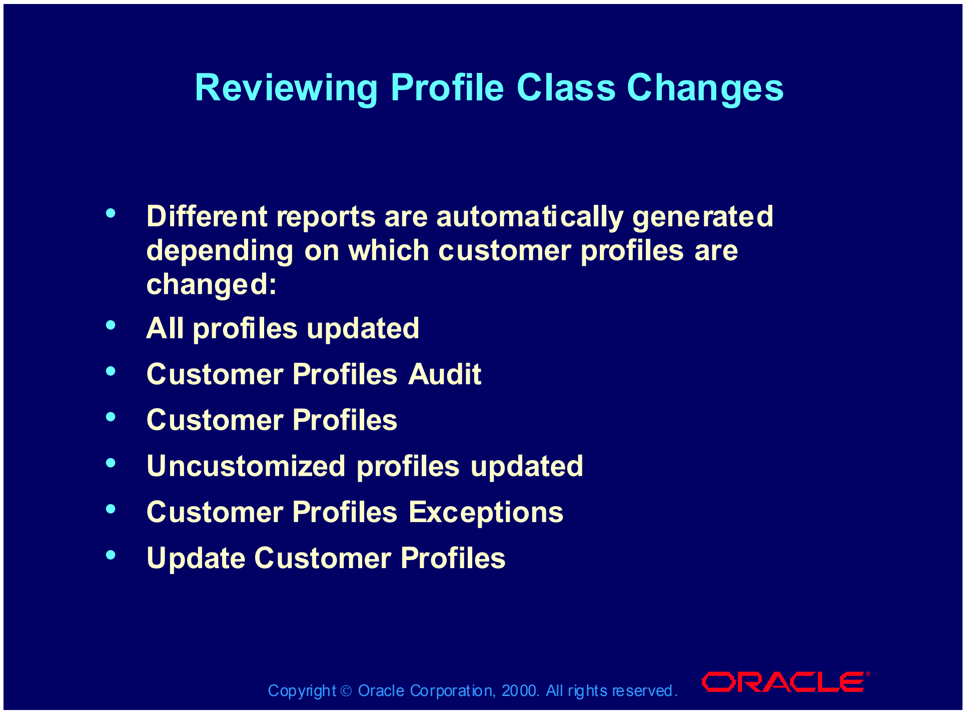
The options are:

•Do Not Update Existing Profiles: Only the profiles of new customers created in the future will reflect the changes.

•Update All Profiles: The attribute will be updated in all customers using this profiles.

•Update All Uncustomized Profiles: Profile classes set the default values initially assigned to individual customer profiles. If an attribute in an individual customer profile is customized to be different from its profile class, changes to the value of a profile class attribute do not change the customized value of the attribute in the individual customer profile.

Reviewing Profile Class Changes



Reports Generated After Changes

When changes to a profile class cause changes to customer profiles, Oracle Order Entry/Shipping automatically generates the reports necessary to review the changes. If all customer profiles are updated by the changes, the Customer Profiles Audit and Customer Profiles reports are generated. The audit report summarizes changes made to the profile class. If only uncustomized customer profiles are changed, the exceptions report shows which customer profiles were not changed.

Review Question

Review Question

You create profile classes by assigning default attribute values to similar customers based on:

1. Credit and payment terms
2. Statement and invoice printing
3. Collector and dunning letter sets
4. Finance charge terms
5. All of the above
6. None of the above

Review Question

You create profile classes by assigning default attribute values to similar customers based on:

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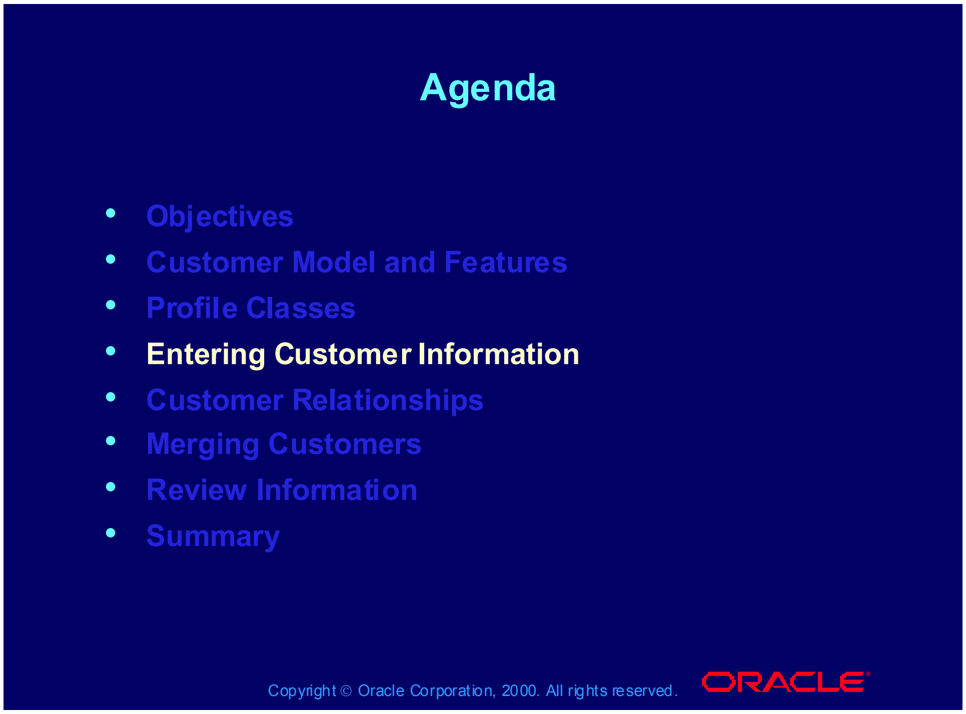
Agenda


Agenda
Objectives
Customer Model and Features
Profile Classes
Entering Customer Information
Customer Relationships
Merging Customers
Review Information
Summary
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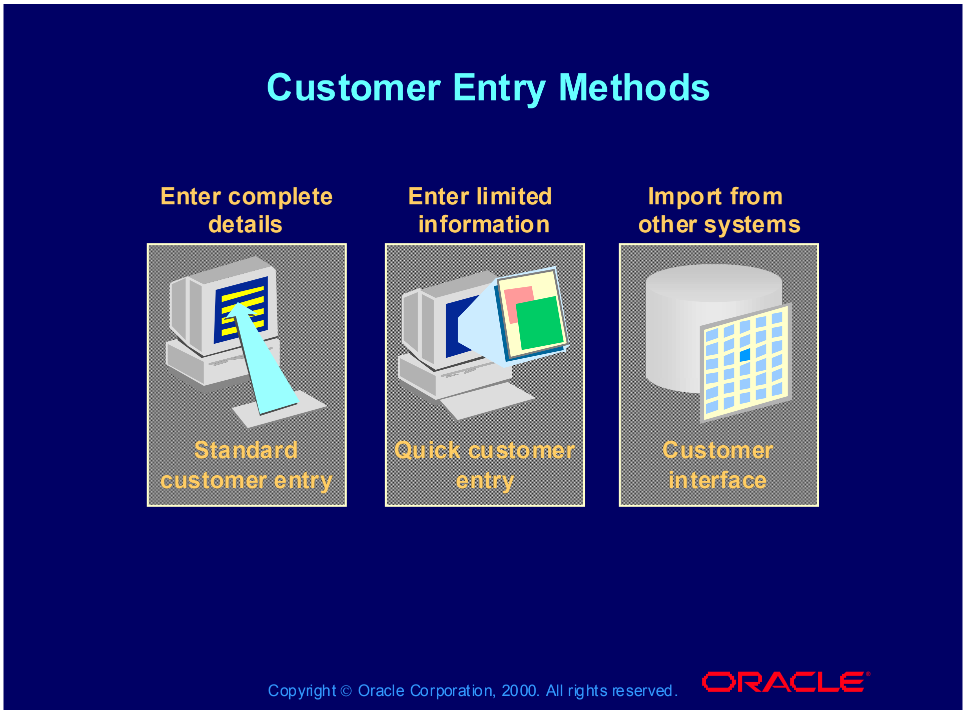
Enter Customer Information

Enter Customer Information

- You can use all of the following methods to enter customer information, for example, addresses, phone numbers, contact names, and business purpose:
  - Standard
  - Quick
  - Interface

Customer Entry Methods



Standard Customer Entry: Enter detail customer information such as contact roles, telephone numbers, customer's shipping preferences, taxing requirements, financial information and addresses

Quick Customer Entry: Enter minimal customer information.

Customer Interfaces:

• EDI transactions

• External Systems

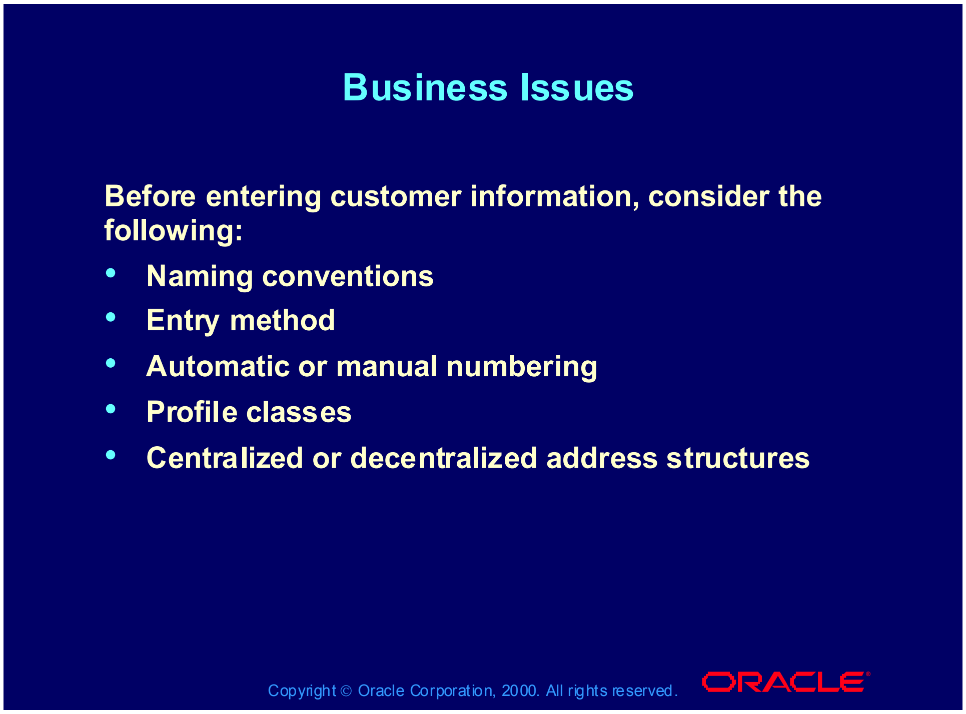
• Order Import

Use the Quick Customer Entry to enter minimal customer information.

Note: You do not have the ability to specify a location code, a primary bill-to or a primary ship-to.

All data added on the Quick Customer form is associated with the single address only.

You can add more detailed information later using the Standard Customer entry.



Before Entering Customer Information

Specify naming conventions such as capitalization and abbreviations.

Select the appropriate data entry method: Standard Customer Entry, Quick Customer Entry, or Customer Interface.

Select the Automatic Customer Numbering and Site Numbering system options and the Automatic Contact Numbering profile option to automatically number customers, sites, and contacts; or select the manual numbering option.

Use the Allow Payment of Unrelated Invoices system option to permit payment of unrelated customers' invoices.

Decide how to set up decentralized customers with multiple sites: as one customer with multiple sites, or as multiple customers with one site.

Business Issues

Business Issues

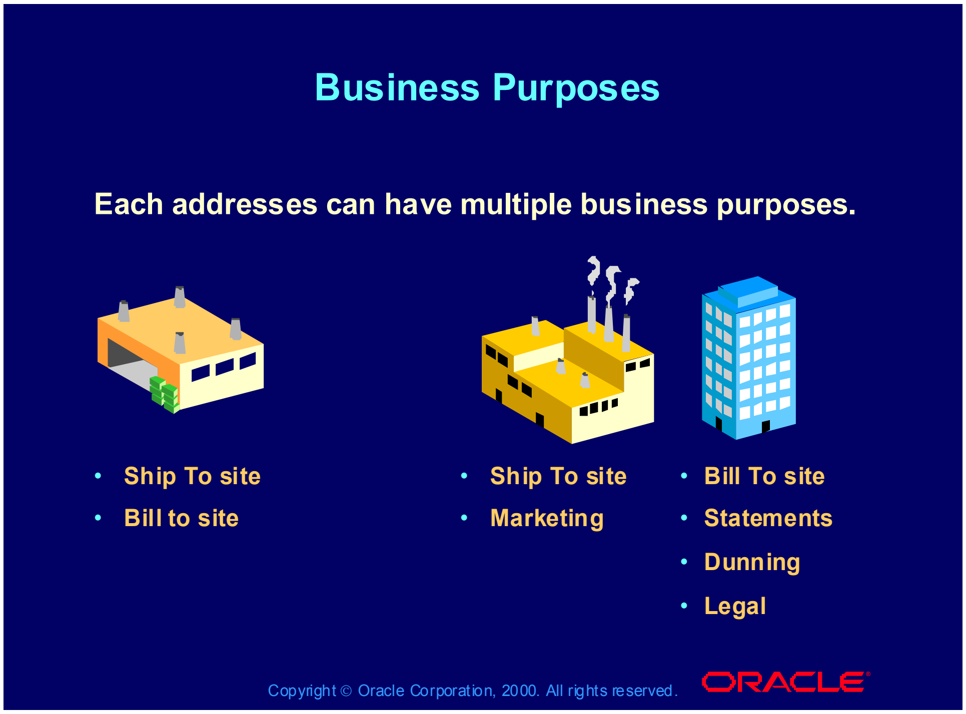
- Classifications and grouping for pricing functionality and for reports, for example:
  - Customer class
  - Customer type
  - Sales channel
  - Category
  - SIC

Setting Customer Tax Attributes

Setting Customer Tax Attributes

- Standard: The taxing function refers to the tax tables to determine if the customer requires tax addition. If so, it selects the appropriate taxing method.
- Exempt: No tax addition; you enter the tax exemption number and reason
- Required: The taxing function always uses tax addition

Business Purposes

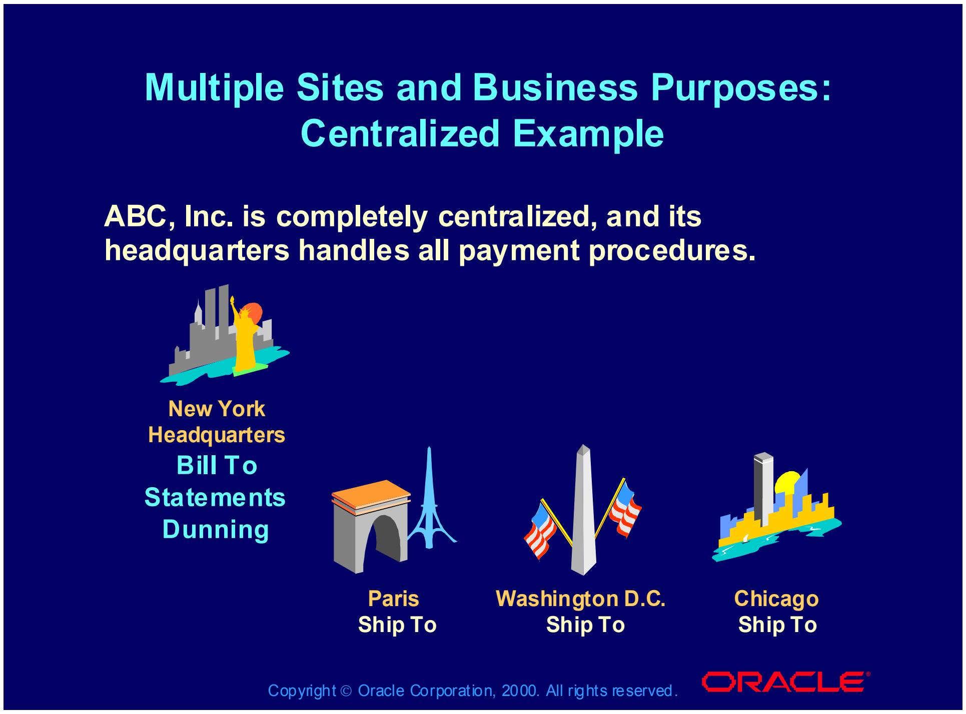


Instructor Note

You can establish two business purposes for a single address site for simple customer needs.

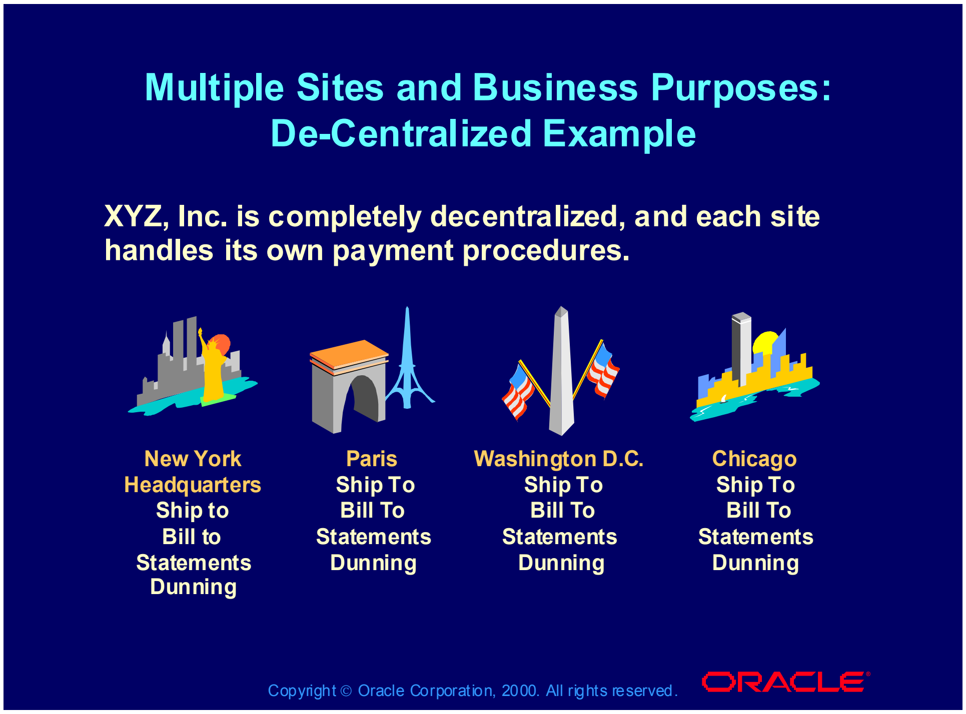
Creating multiple addresses sites for customers might require different business purposes for any given address location.

Multiple Sites and Business Purposes: Centralized Example



In this example, ABC Company's Headquarters is in New York, and all billing information will be received there. Products will be shipped to the Paris, Washington, and Chicago customer locations.

Multiple Sites and Business Purposes: De-Centralized Example



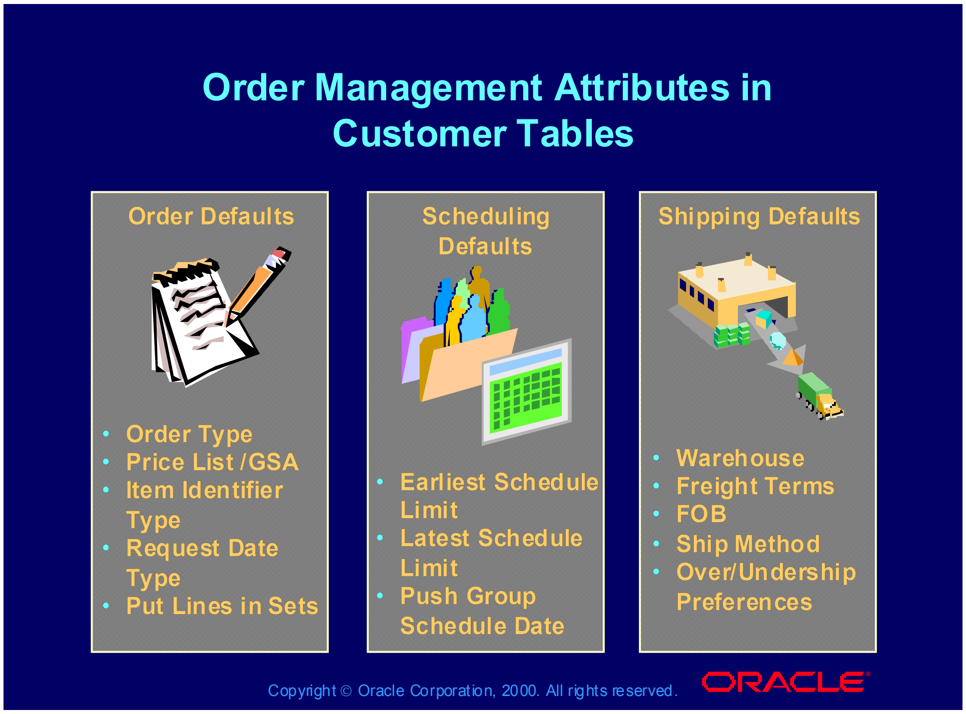
In this example, all location will be required to pay the invoices for the goods they received. Each site has a Bill to and Ship to business purpose established for it's location.

Order Management Customer Information

Order Management Customer Information

- You can store order management information in both the customer header and address business purpose levels.
- Use this information for defaulting during order entry.

Order Management Attributes in Customer Tables



You can store order management information in both the customer header and address business purpose levels.

Use this information for defaulting during order entry.

Multiple Business Purposes

Consider the following issues before you set up multiple business purposes:

- You must enter addresses during sales order entry. According to Oracle Receivables processing rules, you can designate only one site as the primary site for each business use.
- The primary site is the default site for order entry and you can select a secondary site from the list of values.

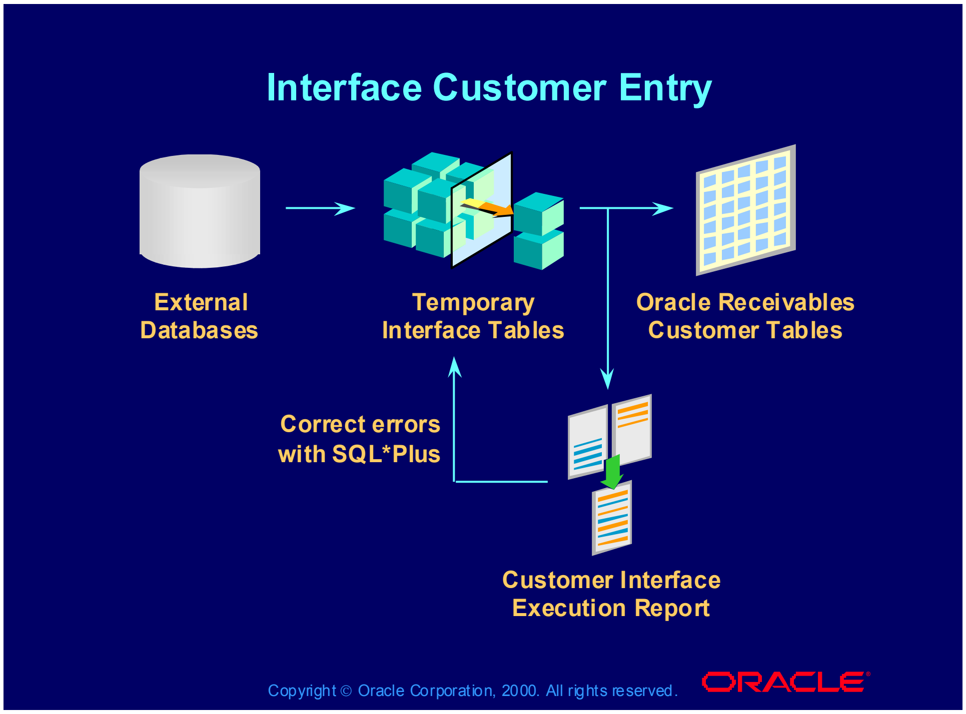
Over and Under Shipments

In the case of an over/under shipment, Order Management will use the customer's tolerance attributes to determine if the quantity invoiced should be the ordered quantity or the shipped quantity.

If there are no tolerances associated with the customer records, Order Management uses the following Profile Options:

- OM: Over Shipment Invoice Basis
- OM: Under Shipment Invoice Basis
- OM: Over Return Invoice Basis
- OM: Under Return Invoice Basis
- OM: Over Shipment Tolerance (percent you can over ship)
- OM: Under Shipment Tolerance (percent you can under ship)

Interface Customer Entry



(N) (Oracle Receivables) Interfaces > Customer

(Help) (N) Oracle Receivables > Customers > Customer Interface

When importing customer information from external databases:

The data flows into temporary interface tables, then on to Oracle Customer master tables within the Receivables module. A report can be run to view this interface from the external database. Any errors can be corrected with PL/SQL within the temporary tables.

Importing Customer Data

All customer data that you enter in the Customers window can be imported using the customer interface.

Add customer relationships through customer interface.

Import customer profile class information such as payment terms, statement, automatic receipt, finance charge, dunning, and invoicing information.

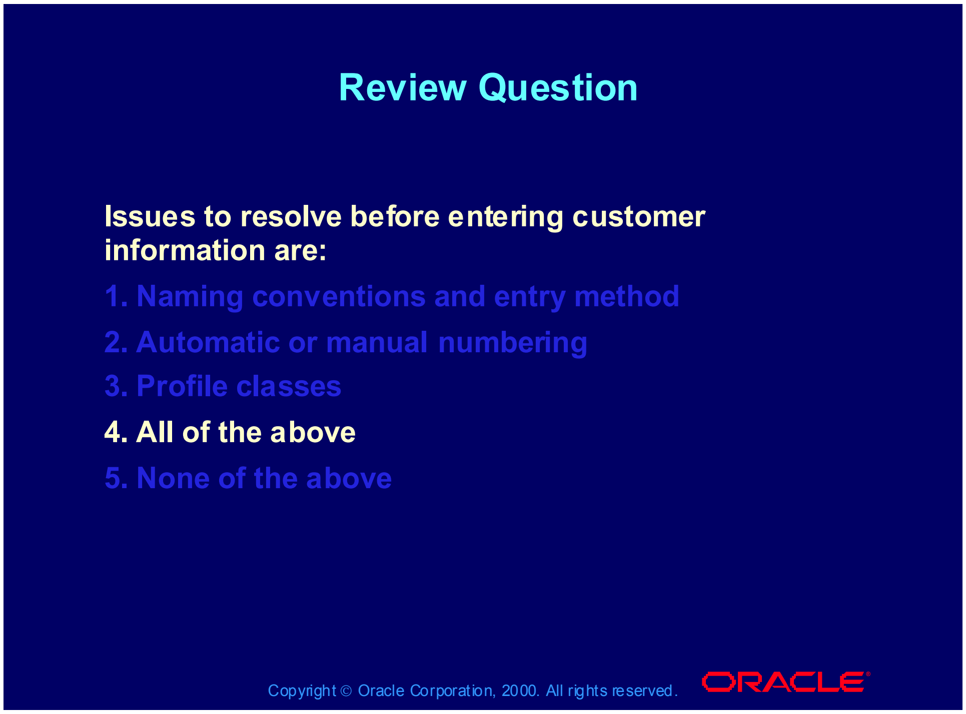
Updating Customer Data

If customer data is maintained in an external system, use the customer interface to update the information at regular intervals.

Review Question

Issues to resolve before entering customer information are:

1. Naming conventions and entry method
2. Automatic or manual numbering
3. Profile classes
4. All of the above
5. None of the above


Review Question
Issues to resolve before entering customer information are:
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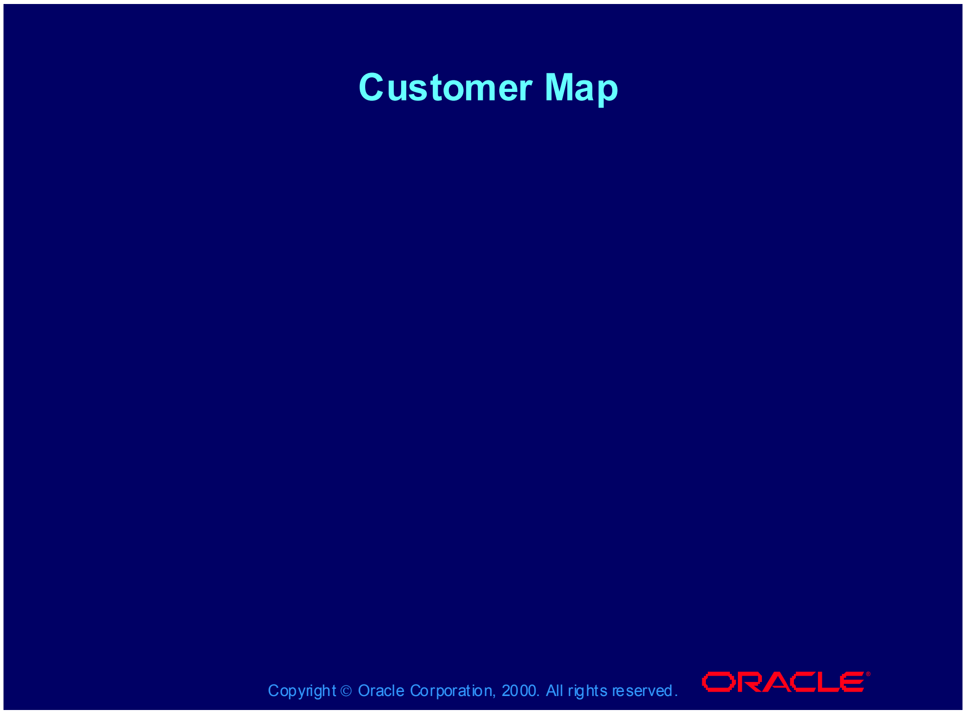
Customer Map

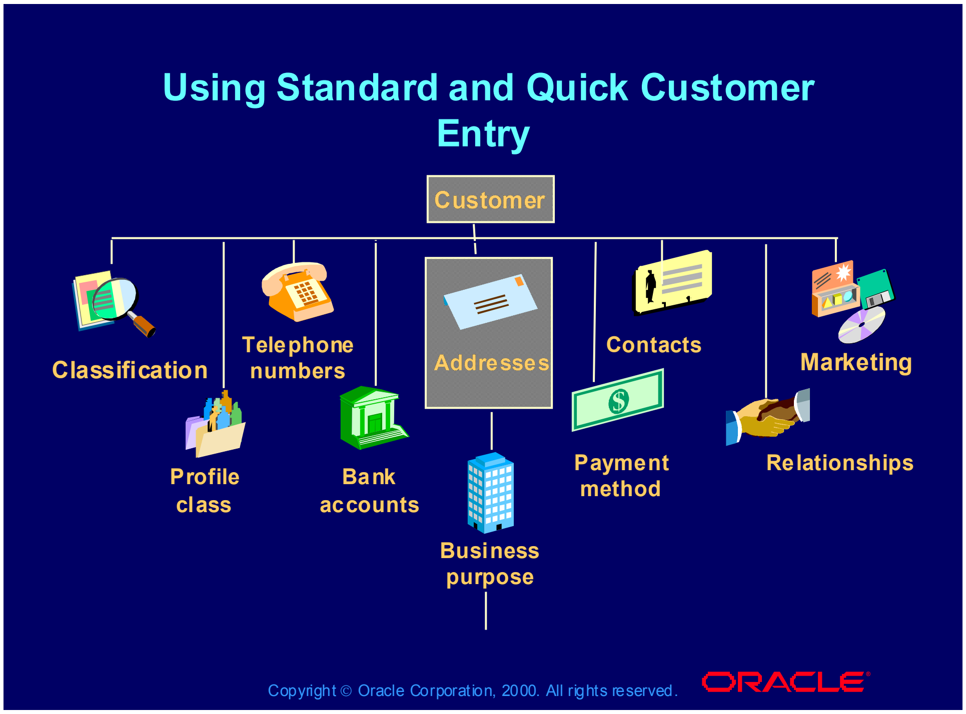


Customer, Address, and Business-Purpose Information

Customer information can be entered at a customer level, for each address of the customer, and for the business-purpose at each address.

Contact information, such as telephone numbers, can be assigned at all levels. You can assign payment method and bank account information to an address only if that address has been assigned a Bill To business purpose.

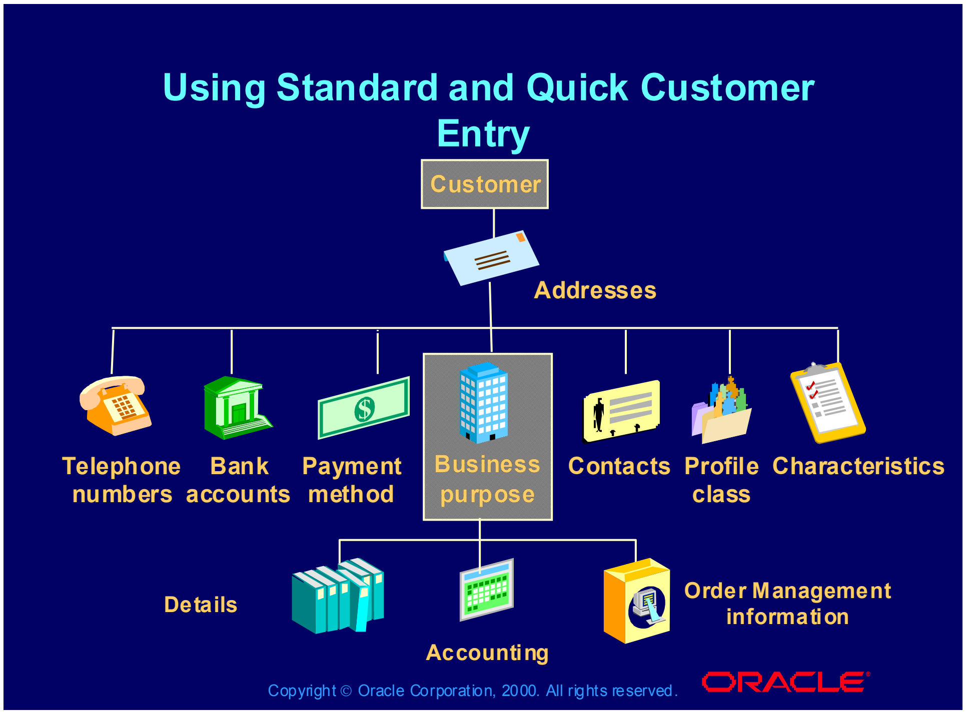
Using Standard and Quick Customer Entry



(N) Customers > Standard
(N) Customers > Quick

(Help) (N) Oracle Receivables > Customers > Entering Customers

Using Standard and Quick Customer Entry



Consider the following issues when setting up multiple business purposes:

Oracle Receivables/Order Management permits only one site to be designated as the primary site for any particular business use.

The primary site becomes the default site when orders are entered in the Sales Order window.

When you override the default site, the secondary sites appear in the list of values.

Linking Bill To and Ship To Locations

A Ship To address can have an associated Bill To address.

The associated Bill To address becomes the default during invoice entry when the Ship To location is selected.

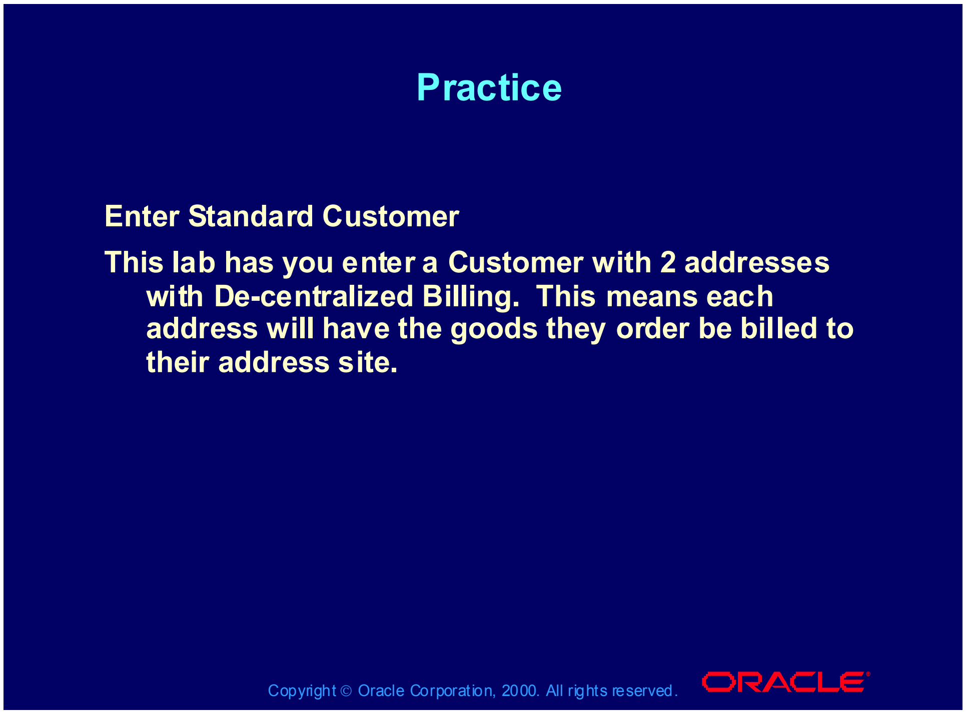
If the Order Management Defaulting Rules refer to customer as a source, the Bill To address defaults during order entry in the Orders window.

Identifying an Address for a Customer Business Purpose

The Location attribute in the Business Purposes alternative region of the Customer Addresses window provides a simple way to name or identify an address. Location is used in transaction entry, receipts entry, create/approve/ confirm automatic receipts and remittances, orders, and returns windows.

To have Order Management automatically number locations, you can use the Automatic Site Numbering system option. If you select the system option check box, Order Management will uniquely number all the customer locations.

Practice



Navigate Customers > Standard

Name: XX-Big City Electronics Wholesale (where XX is your initials)

Click [B] Find and when 'Note' displays, click [B] OK.

Click [B] New.

2. Select (T) Classification

Profile Class: DEFAULT

Type: External

Class: High Technology

Category: High Technology

Sales Channel: Commercial

3. Select (T) Order Management

Price List: Corporate

Freight Terms: Prepaid

FOB: Customer Site

Warehouse: Seattle Manufacturing

4. Select (T) Addresses

Click [B] New.

Country: United States

Address: 222 W. Las Colinas Blvd.

Postal Code: 75039 (Note: City, State, and County will default)

5. Select (T) Business Purposes

    Usage: Bill To

    Location: BIG D

    Primary: Checked

    Move cursor to next row of the Usage field.

    Usage: Ship To

    Location: BIG D

    Primary: Checked

6. Save your work. Note the Site Number.
7. Close the Customer Addresses window.
8. Select (T) Addresses

    Click [B] New.

    Country: United States

    Address: 2020 Michigan Ave.

    Postal Code: 60600 (Note: City, State, and County will default)

9. Select (T) Business Purposes

    Usage: Ship To

    Location: CHICAGO

    Bill To: BIG D

    Primary: Unchecked

10. Save your work and note the Site Number.
11. Close the Customer Addresses window.
12. Note the Customer Number.

Practice

Practice

Create a Profile Class

The intention of this exercise to allow you to define a new credit profile class an see how this will interact with OM. The credit profile class also has a number of fields/settings which impact Receivables (e.g. Auto Cash Rule, Tax Grouping rule, etc). Many of these fields are mandatory for financial purposes, even though Standard credit checking (e.g., no modifications to the Workflow) in OM will not use them.

Choose Receivables Vision Operations (USA) Responsibility.

(N) Customers-Profile Classes.

Name: XXX-New (where XXX are your initials).

Description: New Customer.

The following fields also impact OM:

Status: Active, Tolerance: 0, Credit Check :Yes

Payment Terms: use the pick list and choose 30 Net, Override Terms: No

The following fields do not directly interfere with OM:

Collector: use pick list and choose Jamie Jones (or any other if Jamie Jones is not available)

Allow Discount: No, Receipt Grace: 0

Match Receipt by: use the pick list and choose Sales Order.

AutoCash Rule: use the pick list and choose Standard. Remainder by: use the pick list and choose Invoice Match.

Check the Charge Interest Box. Check the Compound Interest Box.

Days in Period: use the pick list and choose 30, Check the Send Statements Box

Check The Send Credit Balance, Cycle: us the pick list and choose Monthly

Check the Dunning Send Letters Box, Letter Sent: use the pick list and choose Standard.

Select the “Profile Class Amount” Tab (the credit limit and order credit limit settings will determine whether an order will be automatically put on hold if credit limits are exceeded).

For the purpose of these exercises limits will be set in US Dollars

Finance Charge Interest Rates : 10%, Min Customer Balance for Finance Charges: $1

Min Invoice Balance for Finance Charges:$5, Min Dunning Amount:$5

Min Dunning Invoice Amount:$5.

Credit Limit:$10,000.00, Order Credit Limit:$1,000.00

Save your information, close the form and return to the main menu.

Switch responsibility to Order Management Super User, Vision Operations.

Create a new customer XX-American Circuit Express in the Standard way (N) Customers -> Standard, see for further instructions step 1 to 6 in exercise 1). Create one address for bill to and ship to and choose your XXX-New in the Profile Class (Classification tab) before you save your work.

Differences between Standard and Quick customer entry

Differences between Standard and Quick customer entry

The primary difference between the standard and quick methods is that the quick method allows you to assign business purposes simply and quickly to a single address.

Other differences underline the limitations of quick customer entry:

- Bill to and Ship to cannot be linked to each other.
- Business purposes cannot be identified as Primary, or default.
- Location names cannot be assigned to an address.

Practice

Practice

Enter Quick Customers

The main difference between the Standard Customer Entry and the Quick Customer Entry is the site id. At Quick Entry the site id is generated for you (number). At Standard Entry you can specify a meaning full name is site id. Quick Customer entry also does not tag any selected Business Purposes as Primary, therefore, they will not default in when selecting this customer in Sales Order. You will be entering a total of 3 quick customers for future customer labs.

Navigate Customers > Quick

XX-Quick 1

Address = 4501 N. 33rd Street New York New York 10001

XX-Quick 2

Address = 4571 Central Avenue Chicago,IL 60601

XX-Quick 3

Address = 77199 107TH Avenue Phoenix, AZ 85310

Agenda

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- Objectives
- Customer Model and Features
- Profile Classes
- Entering Customer Information
- **Customer Relationships**
- Merging Customers
- Reviewing Information
- Summary

Customer Relationships

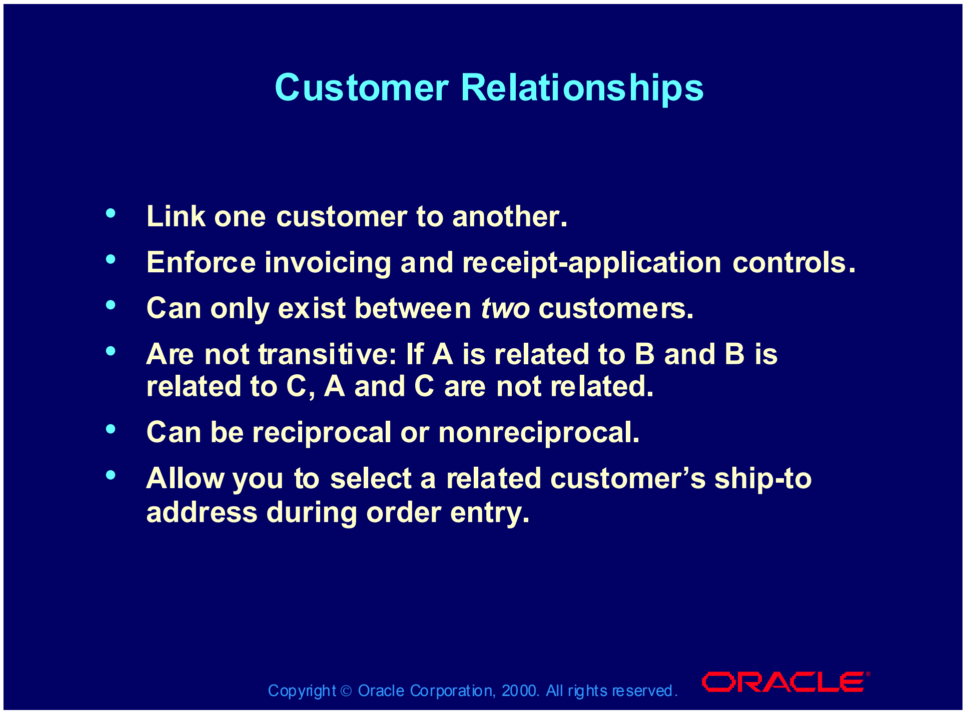
Control Application of Payment Receipts

In the System Options window, if the Allow Payment of Unrelated Invoices check box is clear, Order Management permits application of one customer's receipt to another customer's invoice, only if the customer who owns the invoice is related to the customer who owns the receipt. If Allow Payment of Unrelated Invoices is selected, a relationship does not have to be defined.

Control Creation of Invoices Against Agreements and Commitments

Order Management permits creation of invoices for the related customer against previously entered commitments for the primary customer, if there is a relationship between the primary and related customers.

Customer Relationships



(N) Customers > Quick or Standard > (T) Relationships

(Help) (N) Oracle Receivables > Customers > Creating Customer Relationships

Create customer relationships to control:

•Payment of unrelated invoices

•Sharing of pricing entitlements

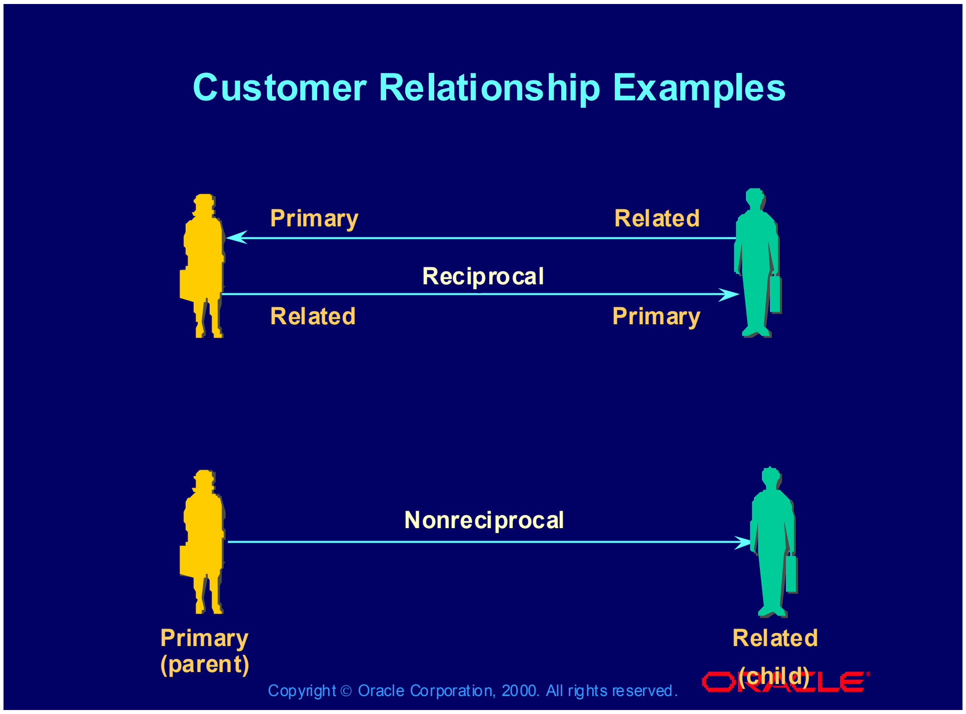
•Consolidation of business addresses

System Options:

•Select check box Allow Payment of Unrelated Transactions if you want to permit application of funds from one customer to another unrelated customer.

•If you do not select this checkbox, a customer relationship must be setup to apply payments from one customer to another.

Customer Relationship Examples

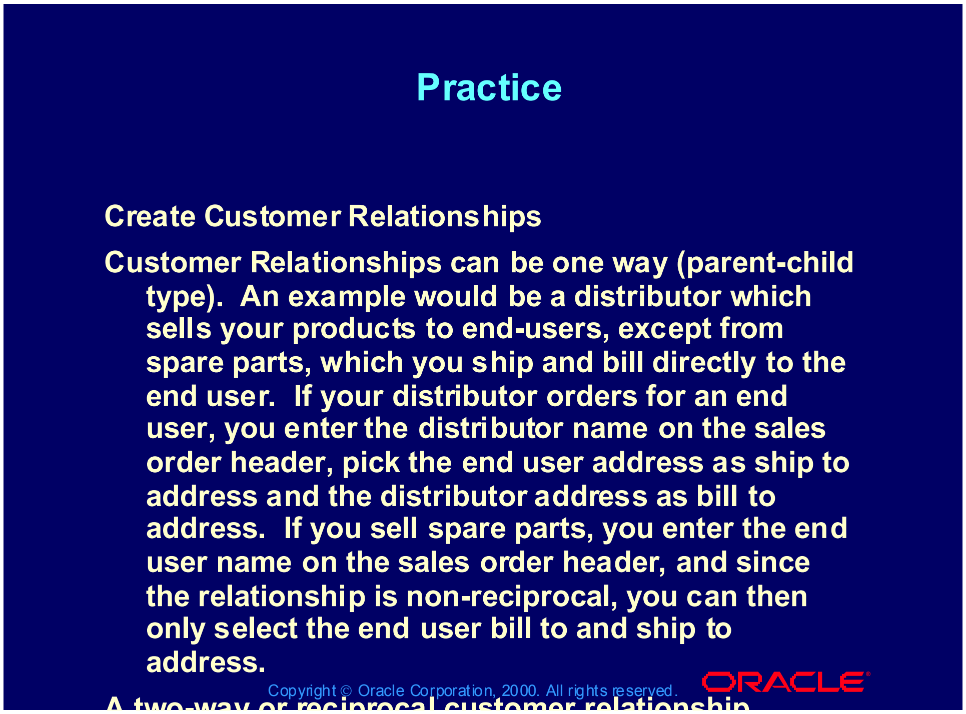


Reciprocal and Nonreciprocal

A reciprocal relationship allows two customers to apply payments to each others' invoices and to match invoices against each others' commitments. For example, in the case of a parent company and a subsidiary, payments made by either the parent company or the subsidiary could be applied to invoices issued to the subsidiary or the parent.

A nonreciprocal relationship implies that only the primary customer can apply payments or commitments to the related customer's invoices. For example, in a situation where a parent company is the primary customer and a subsidiary is a related customer, payments made by the parent can be applied to invoices issued to the subsidiary, but payments made by the subsidiary cannot be used to pay invoices issued to the parent.

Practice



(N) Customers - Standard - Query XX-Big City Electronics Wholesale as the Customer - Select the Relationship Tab and enter the following details

Relate XX-Big City Electronics Wholesale to XX-Quick 1 in a Reciprocal manner

Relate XX-Big City Electronics Wholesale to XX-Quick 2 in a Non-Reciprocal manner

Customers - Standard - Query Quick Customer 2 as the Customer - Select the Relationship Tab and view the Relationship

Do you see the related XX-Big City Electronics Wholesale? Why or why not?

Review Question

Why do you create customer relationships?

1. To keep like customers together
2. To classify customers by SIC code
3. To control payments and share addresses

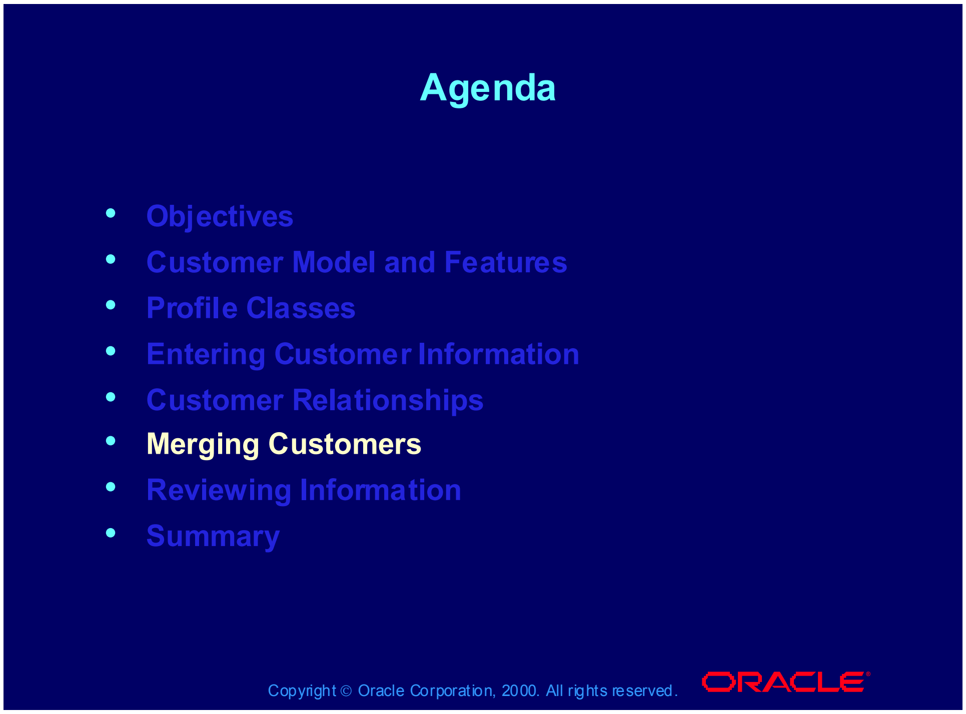
Review Question

Review Question

Why do you create customer relationships?

1. To keep like customers together
2. To classify customers by SIC code
3. To control payments and share addresses

Agenda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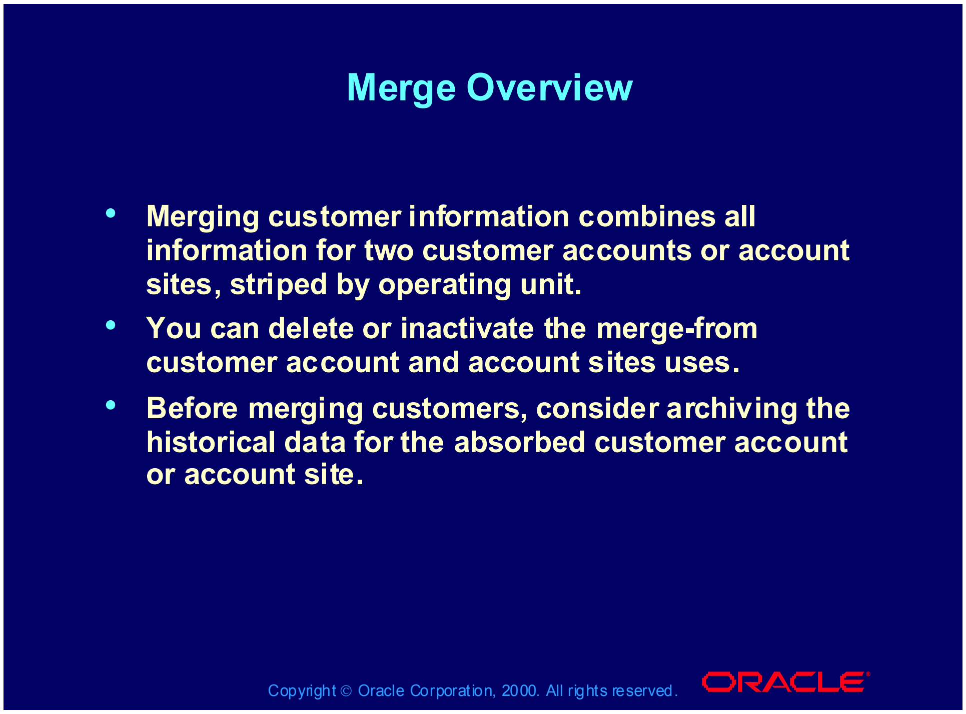
Merge Customers

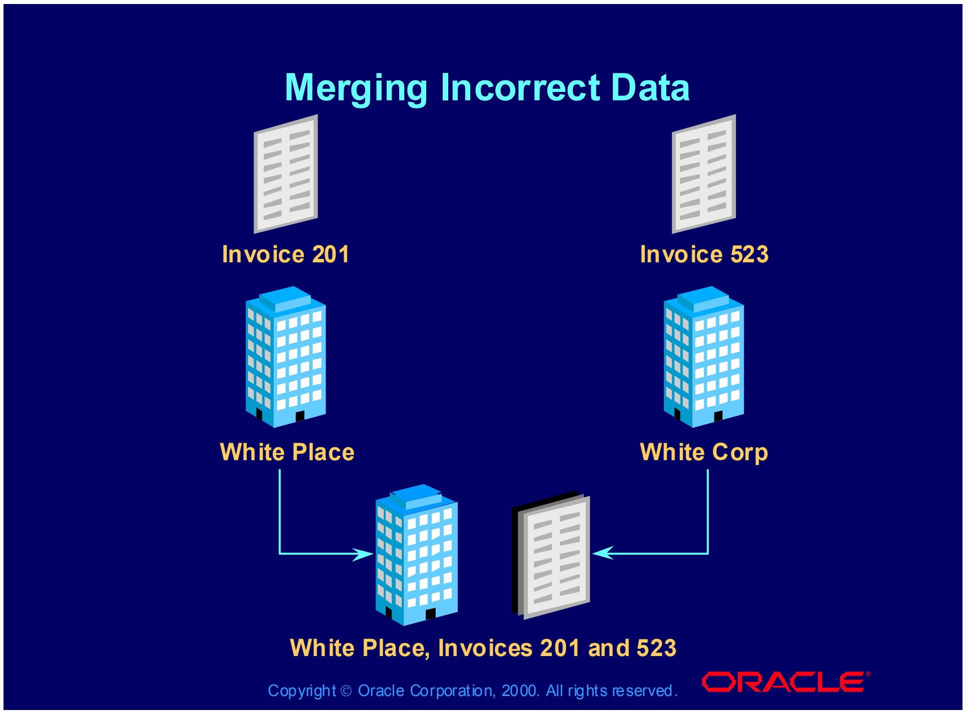
Merge customers to:

- Eliminate incorrect data and duplicate information
- Consolidate account site data
- Reflect customer account changes due to business consolidation

Merge Overview



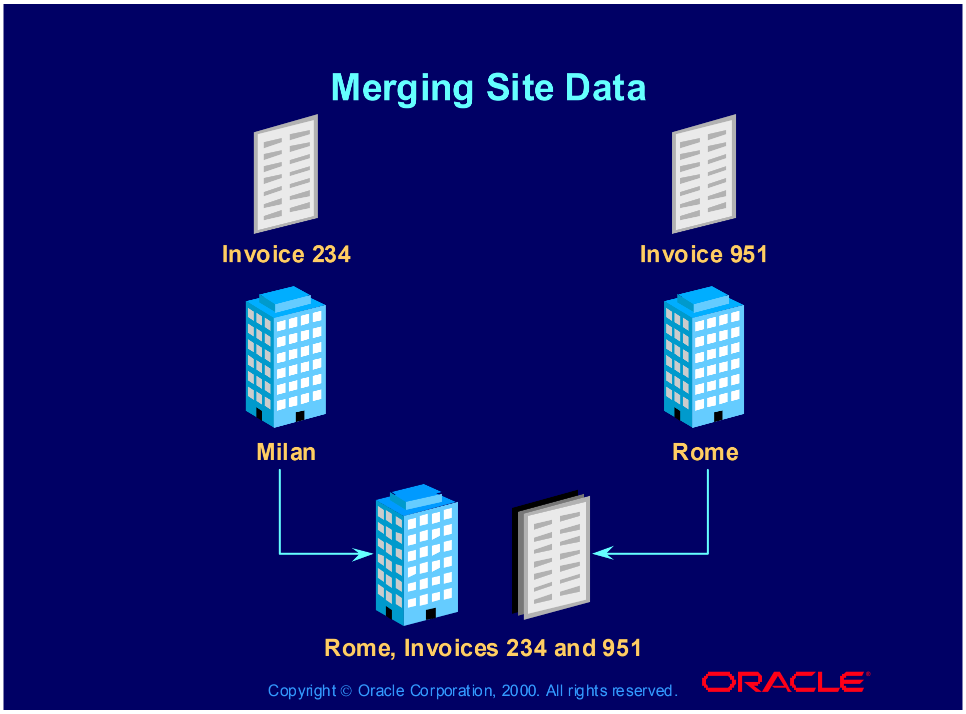
Merging Incorrect Data



Data Correction-Eliminating Duplicate Information

The most common reason to merge customers is to clean up data entered in error. For example, data related to an existing customer “White Place” might be entered in error for a new customer created as “White Corp.” You merge the data for these customers to consolidate all the data for White Place. Misspellings and the incorrect use of upper and lower case are also common reasons for merging customers.

Merging Site Data

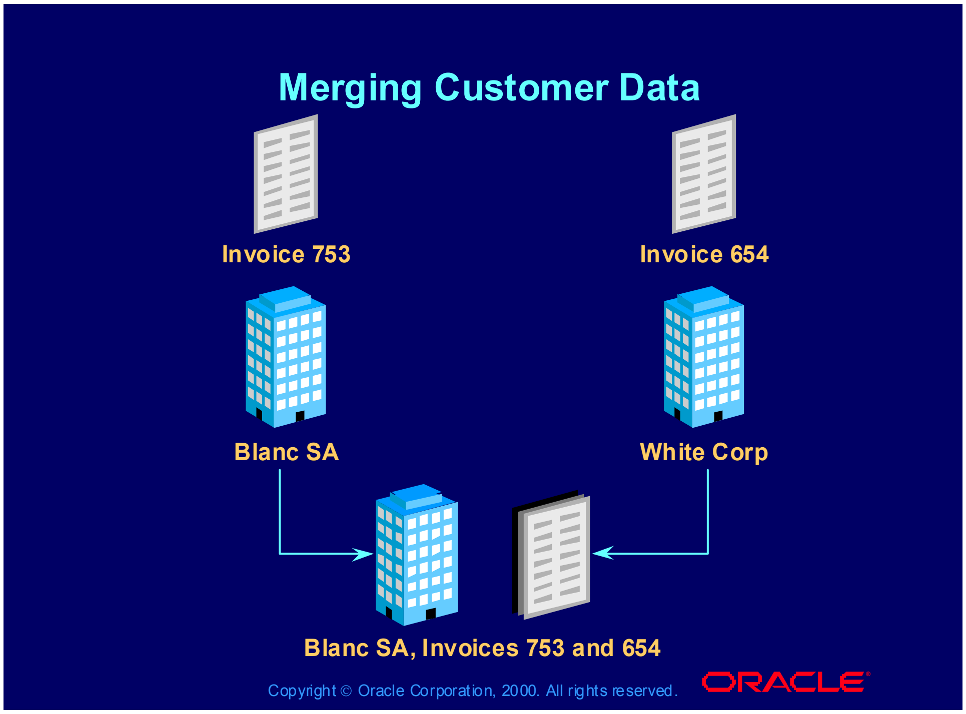


Consolidation or Relocation of Sites

Another common reason for merging customer data is the consolidation or relocation of customer sites. For example, if a customer closed a facility in Milan and moved all activity to an existing facility in Rome, the data related to the Milan site would be merged with the data for the Rome site.

Note: Because historical reporting would no longer be available for the Milan site, this reason should be carefully considered before proceeding.

Merging Customer Data



Merger of Customers

A less common reason to merge customer data would be if two different customers merged to form a single customer.

Note: Because historical reporting will no longer be available using the customers' prior names, this reason should be considered carefully before proceeding.

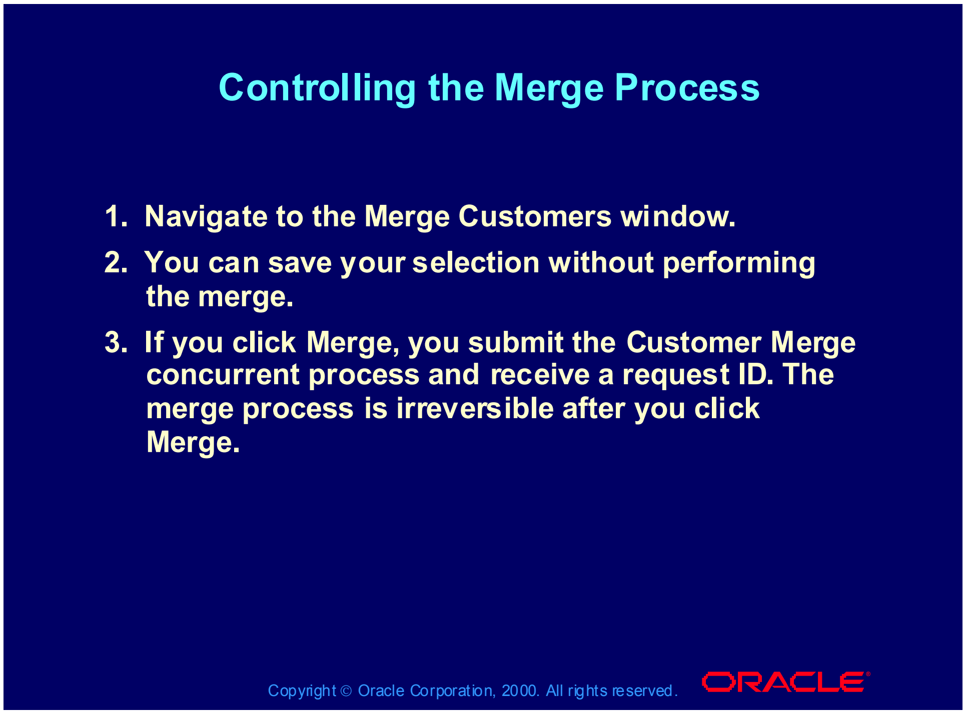
Merging Other Application Transactions

Merging Other Application Transactions

The merge process affects customer information in the following Oracle Applications:

- Order Management
- Receivables
- Inventory
- Project Accounting
- Customer Relationship Management suite, for example, Order Capture and Service

Controlling the Merge Process



(N) Customers > Merge

(Help) (N) Oracle Receivables > Customers > Merging Customers

Control the Merge Process

If the From (previous) customer had a site use that does not exist for the To (new) customer, the system leaves the To address blank. You must assign this site use to the new customer before you complete the merge (Ship To, Bill To, and Marketing only).

After entering the details of the merge, you can save your work to review the merge before the transactions of the customer or sites are transferred. Or you can immediately submit the merge for processing by clicking the Merge button. After the customers are merged, the From (previous) customer's transactions are linked to the To (new) customer in Order Management and in any other Oracle applications that use customer tables.

When merge processing is complete, Order Management automatically generates a Customer Merge Execution report which can be printed or reviewed online.

After customer data has been merged, there are no links between the previous customer and its transaction records. These transactions appear as if they had always belonged to the succeeding customer.

To automatically copy from addresses as to addresses, select Create Same Site.

Practice

Practice

Perform a Merge

XX-Big City Electronics Wholesale acquired XX-Quick 3 and informs you that the Marketing activities will be based at XX-Quick 3 site and shipments and invoices should be directed to XX-XX-Big City Electronics Wholesale address. XX-Quick 3 will no longer operate under its own name.

In Order Management Super User, Vision Operations responsibility,

Customers - Merge.

Enter in the merge from area:

From = XX-Quick 3.

Delete after merge = yes (checkbox is ticked).

To = XX-Big City Electronics Wholesale.

For Bill to address, pick the Bill to site from XX-Big City Electronics Wholesale from the List of Values (LOV).

For Marketing address, tick the box “Create Same Site”

For Ship to address, pick the Ship to site from XX-Big City Electronics Wholesale.

Press the merge button and make a note of your request id.

Go to the menu, select View -> Requests. Click option “find a specific request” and enter your request id, then press find. Once the concurrent request is completed, you can view the Output, by pressing the output button.

Query up customer XX-Quick 3 and note that the customer information has been de-activated (active check box is unchecked).

Review Question

You can delete or inactivate an old customer after merging and the old customer's transactions point to the new customer.

1. True
2. False

Review Question

Review Question

You can delete or inactivate an old customer after merging and the old customer’s transactions point to the new customer.

1. True
2. False

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- Merging Customers
- **Reviewing Information**
- Summary

Reviewing Customer Information

Reviewing Customer Information

With Oracle Order Management, you can:

- Review customer data online
- Search for specific customer information
- Query summary or detail levels of information

- With Oracle Receivables, you can Generate reports using the standard report submission window (le
- With the CRM suite, you can extend your view of customer information with customer intelligence reports and forms

Common Search Scenarios

Common Search Scenarios

To....	Then...
Find all customers assigned to a profile class	Search by profile class
Review detailed information about customer	Search by using customer name or number, or address information
View all customers belonging to an SIC code	Query using the SIC code

Agenda

Agenda

- Objectives
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Summary

In this course, you should have learned how to:

- Define the features enabling you to enter and maintain customer information
- Create customer profile classes and assign them to customers
- Create and maintain customer information
- Enable related customers to establish reciprocal payment and contract terms
- Merge customers and eliminate any duplicate customer information
- Define how to view customer information

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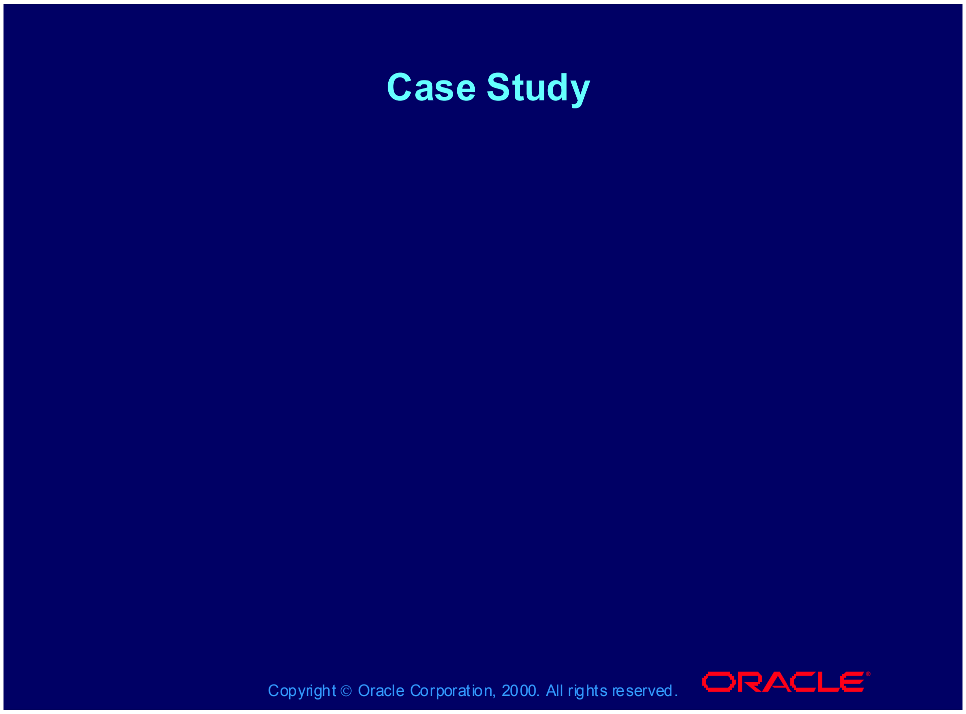
Case Study



Desert Oasis Circuit Express has just called and wishes to become a new customer.

The have stores at the following locations:

389132 N. Jackson 4th Floor Suite 412   Phoenix, AZ 85123
Contact = Marshall Williamson
Phone = 602-563-9201
Email = mwilliamson@DOCE.com

567 Chandler Blvd. Bldg 6 Chandler, AZ 84671
Contact = Michael Cates
Phone = 480-456-1289
Email = mcates@DOCE.com

10779 W. Indian School Road Avondale, AZ 85323
Contact = Rhonda Edwards
Phone = 623-645-3369
Email = Redwards@DOCE.com

All of their bills will be sent to their Corporate Head Quarters in Avondale, and each site will receive goods placed under orders each site will make. They wish to carry the FOB, and would like to have a Undership tolerance of 2% and a Over and Under return tolerance of 5%. They will be using your Corporate Price Lists, and all goods for them will be shipped out of your Seattle warehouse. Barry Lewis is the salesperson who has secured this account for you, ensure He has been linked to receive proper sales credits when this customer places their orders.

Desert Oasis Circuit Express are also affiliated with XX-American Circuit Express. They will be able to receive all goods and benefits of their partner, but they will have an order level credit of $3000 Per Order.

Create the customer, addresses, and perform a relationship as required

Enter Import Orders

Chapter 3


Enter/Import Orders
Oracle Order Management Release 11*i*
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Agenda

Agenda

- Overview
- Entering orders: Header information
- Entering orders: Line information
- Scheduling and shipping orders
- Copying orders
- Importing orders
- Processing drop ship orders, internal orders, and quotes
- Conclusion

Agenda

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- Overview
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Objectives

Objectives

After this course, you should be able to do the following:

- Enter sales order header information
- Enter sales order line information
- Schedule and book a sales order
- Copy an order
- Describe order import
- Enter drop ship and internal orders

Using Oracle Applications Help

1. Navigate to the Oracle Applications Navigator.
2. Help—>Window Help from the menu bar. The Oracle Applications Help window is displayed.
3. Enter your search criteria, enclosed within quotation marks, in the Help field and click Find. Oracle Applications Help displays a list of topics that meet your search criteria.
4. Click a topic to view detailed information.

Note: Click Search Instructions for help with searching Oracle Applications Help.

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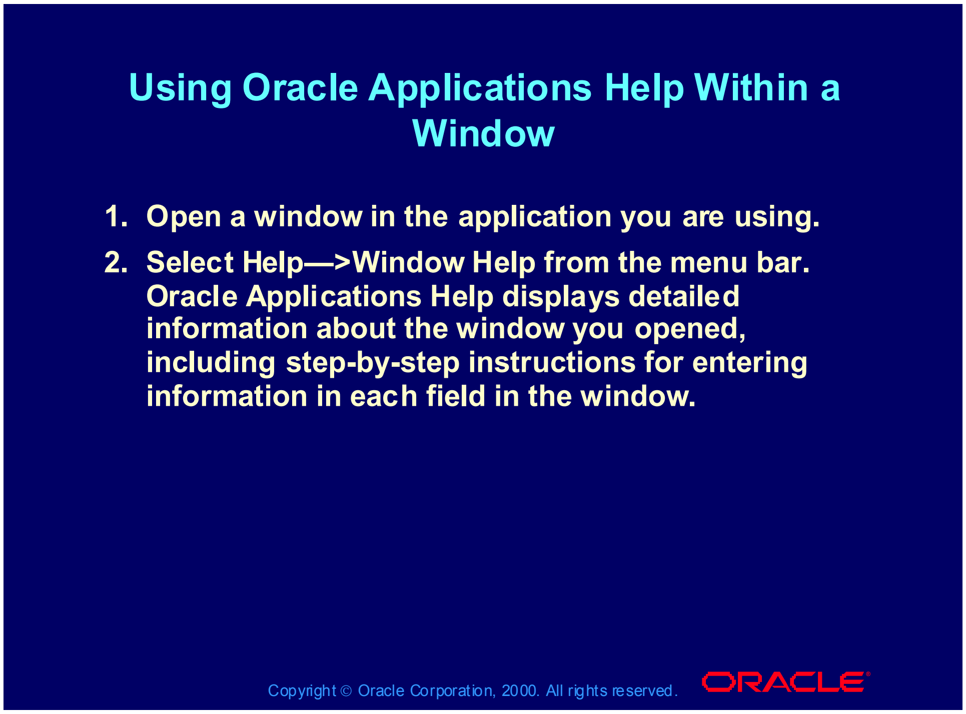
Using Oracle Applications Help Within a Window
1. Open a window in the application you are using.
2. Select Help—>Window Help from the menu bar. Oracle Applications Help displays detailed information about the window you opened, including step-by-step instructions for entering information in each field in the window.
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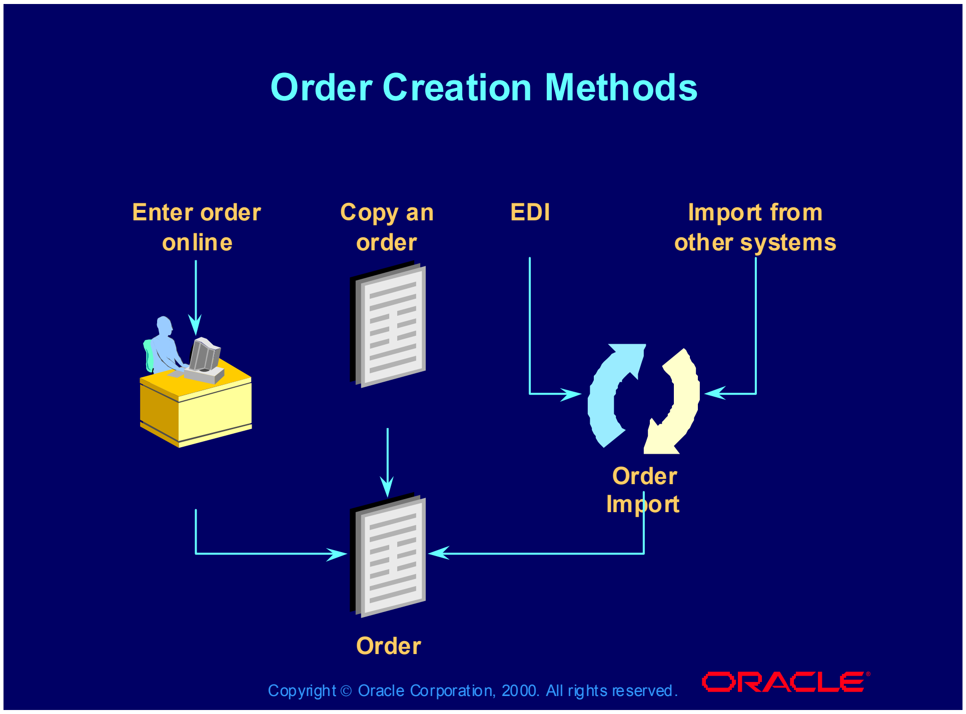
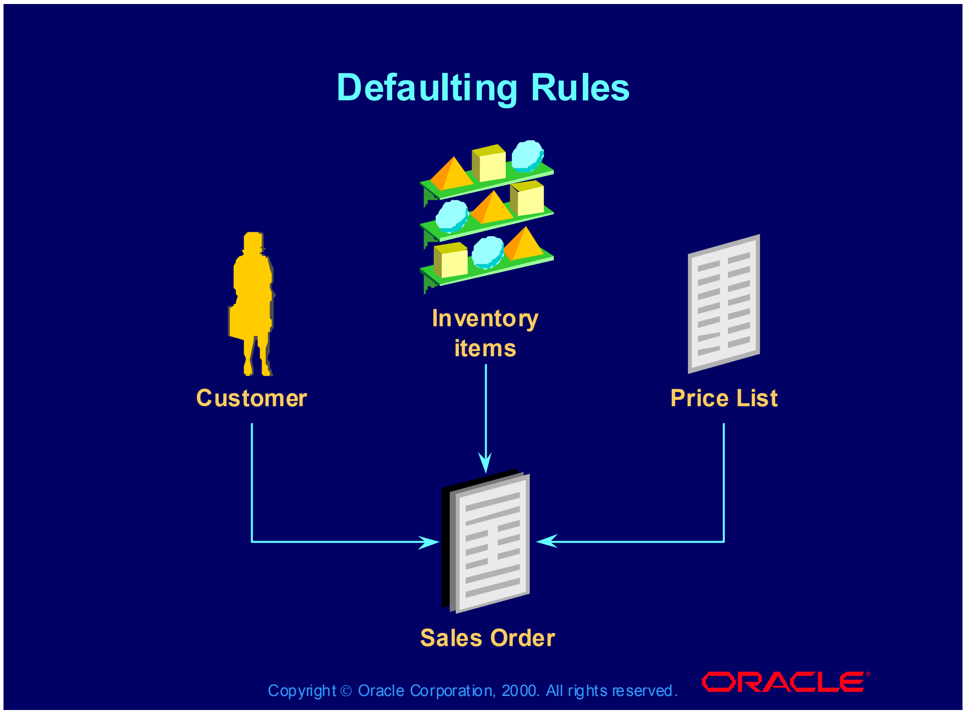
Order Creation Methods



Order Entry Process

- Enter order manually using the Sales Order or Orders Workbench window.
- Copy an existing order to speed data entry.
- Import electronically using EDI or import from another external system; then manage as you would a manually entered order

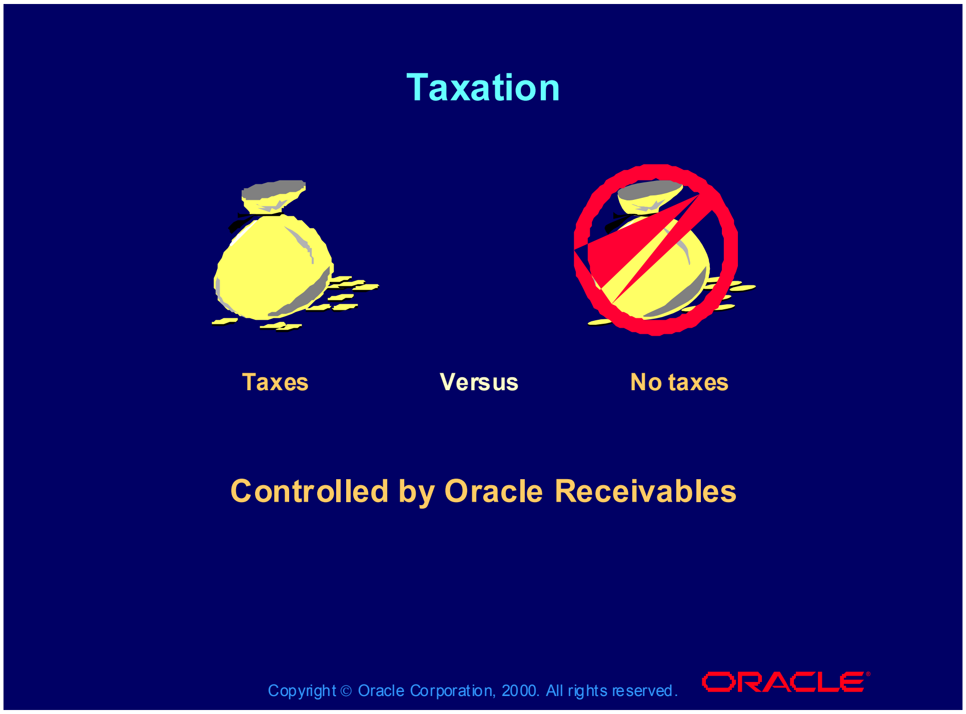
Defaulting Rules



Default Information

- You can define information defaults to reduce order entry time. Oracle Order Management provides you with a way to set up defaults, called Defaulting Rules, which you can create and modify. You can default information from various sources: the customer, customer Bill To or Ship To, agreement, order type, price list, or order line.
- Controls are available with defaulting rules that let you decide whether a defaulted field can be changed at order entry. For example, if the order entry clerk is able to change the price list, you can reflect this in the defaulting rule by allowing override of the defaulted value.

Taxation

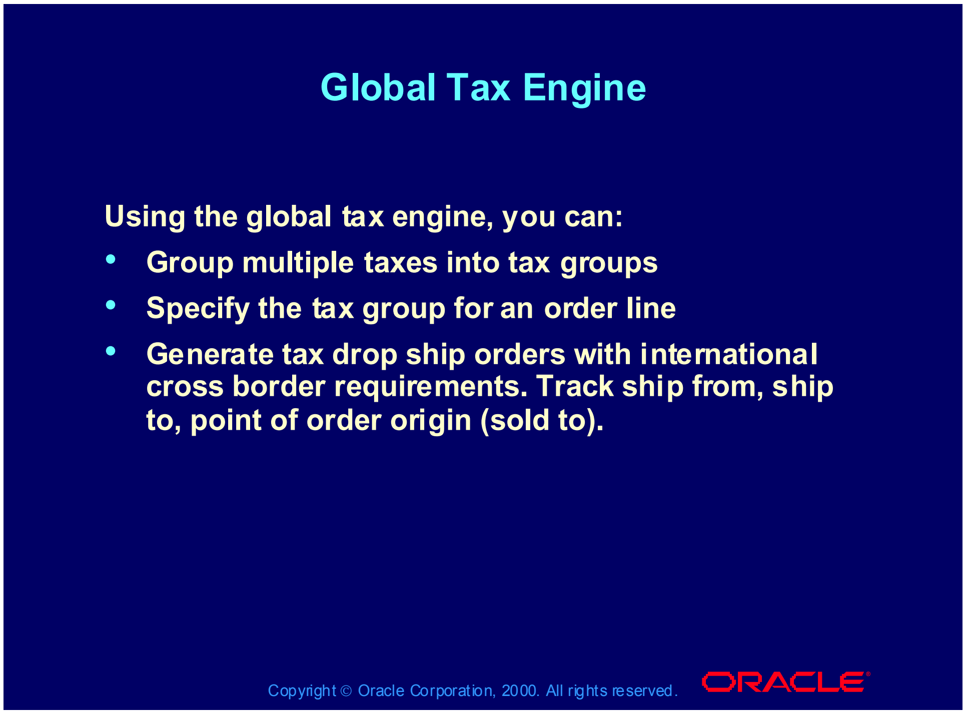


Tax Information

Oracle Order Management/Shipping provides the features to handle most domestic taxing needs. Generally, you define all your taxing parameters, including customer and item exemptions and exceptions, in Oracle Receivables. As each order is invoiced, tax is applied based on those rules. Occasionally, a customer that is normally taxable may have the opportunity to purchase a single order without paying sales tax. You can control whether users can identify such an order as tax exempt by using the Sales Orders window, or whether only your Receivables department can maintain customer and item exemptions. Exemptions entered using the Sales Order window are subject to approval by the Receivables department through the Tax Exemptions window in Receivables.

Oracle Order Management/Shipping enables you to quote an estimated tax for orders at order entry time. The tax estimate can be based on the tax status, address information for the customer, and Value Added Tax (VAT) codes assigned to items, sites, and customers. The actual tax value that appears on the customer's invoice in Oracle Receivables can vary because the tax is calculated during import of Oracle Receivables. You can use the Sales Tax Rate Interface to import locations and postal codes used for address validation from a third party vendor, and load sales tax rate records from your tax feeder system.

You can use the Sales Tax Rate Interface to import locations and postal codes used for address validation from a third party vendor, and load sales tax rate records from your tax feeder system


Global Tax Engine
Using the global tax engine, you can:
• Group multiple taxes into tax groups
• Specify the tax group for an order line
• Generate tax drop ship orders with international cross border requirements. Track ship from, ship to, point of order origin (sold to).
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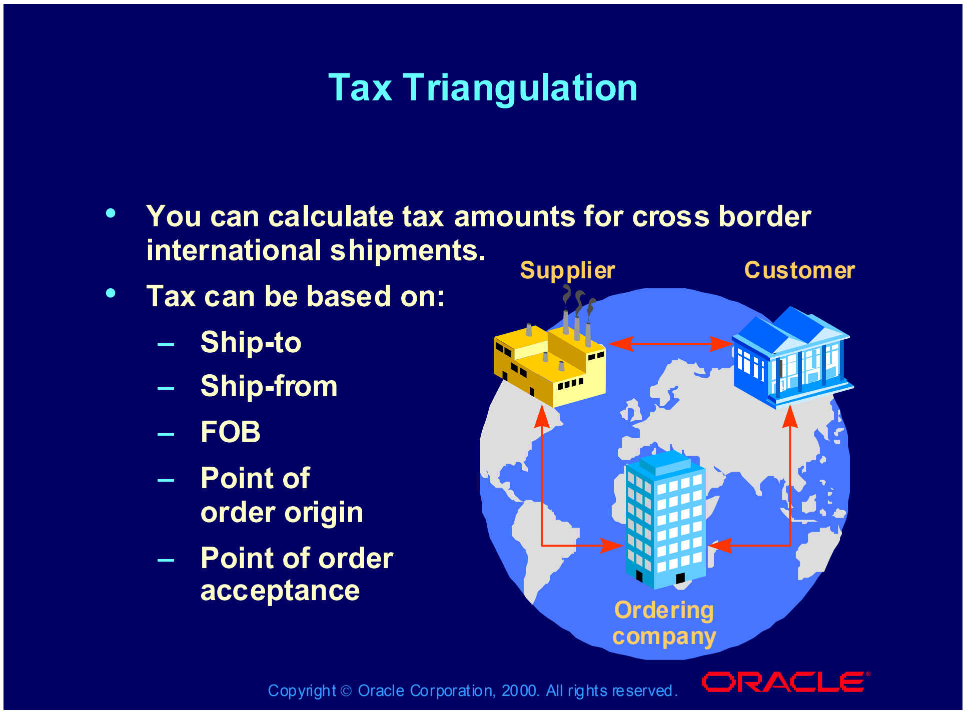
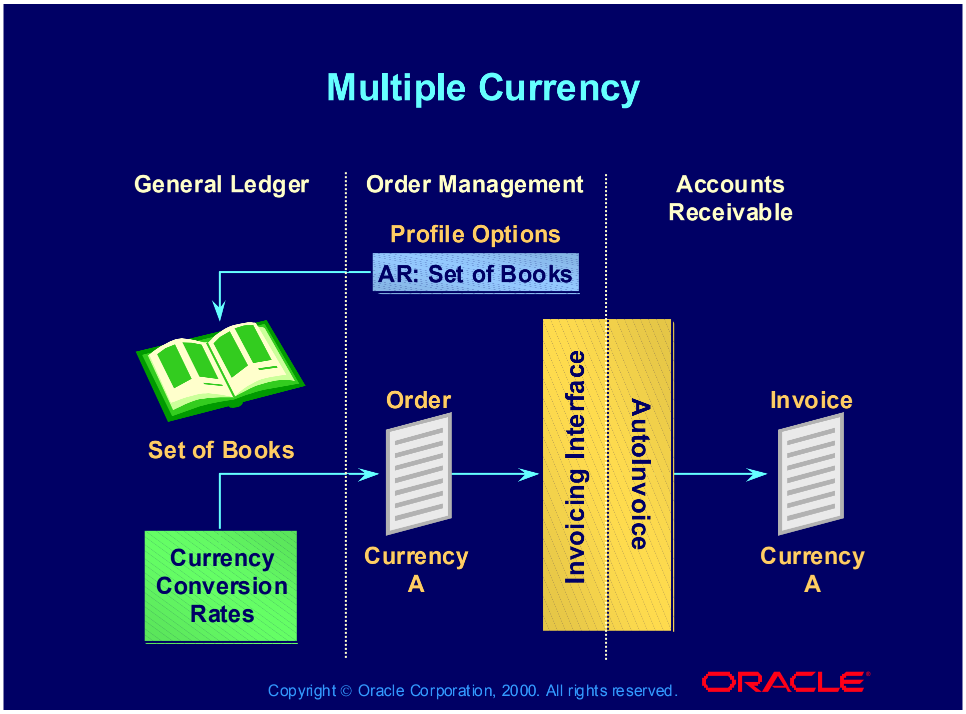
Tax Triangulation



Multiple Currency

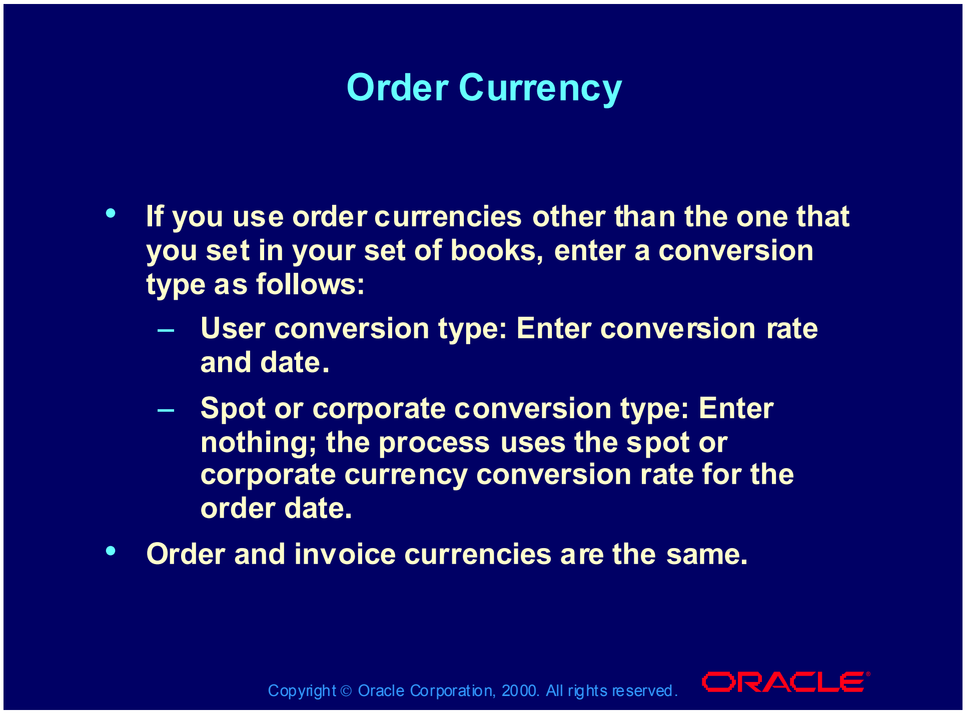


Defining Order Currency

Each order can have a different currency. The price list that you specify on the order must be in the same currency as the order and vice versa. If you enter an order currency other than your functional currency for your set of books, then you must enter a specific conversion type. If you enter the User conversion type, then you must specify the conversion rate and date. All invoices for the order will be in the ordered currency. You can use Defaulting Rules to default the currency and price list to reduce entry time.

If you enter a conversion type of Spot (daily rate) or Corporate (fixed rate), Oracle Order Management/Shipping uses the Spot or Corporate currency conversion rate for the order date to determine the currency conversion. If you use the conversion type of User, then Oracle Order Management/Shipping uses the rate you entered on the order.

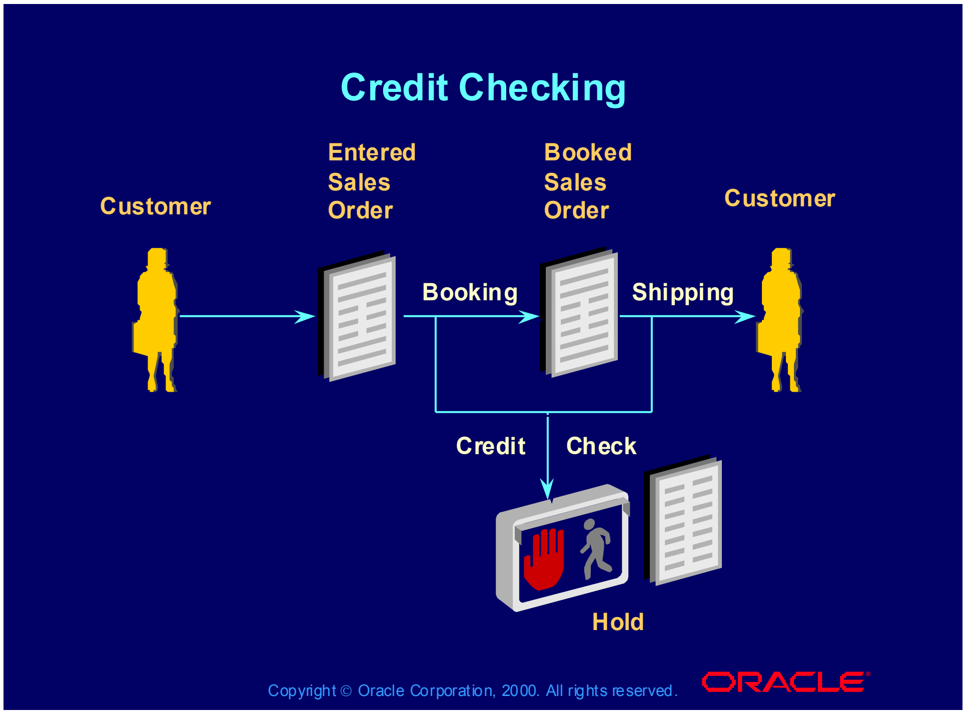
Order Currency



After you interface an order to Oracle Receivables, then Oracle Receivables uses the currency information you entered in the Sales Orders window to calculate the converted value of the order for invoicing purpose. If you entered Spot or Corporate, then Oracle Receivables uses the Spot or Corporate currency conversion rate for the invoice date to determine the currency conversion. If you enter the User conversion type, then Oracle Receivables uses the conversion rate and date that you entered in the Sales Orders window.

Note: In summary, the currency on the order becomes the currency on the invoice. A conversion rate may apply for Spot or Corporate.

Credit Checking

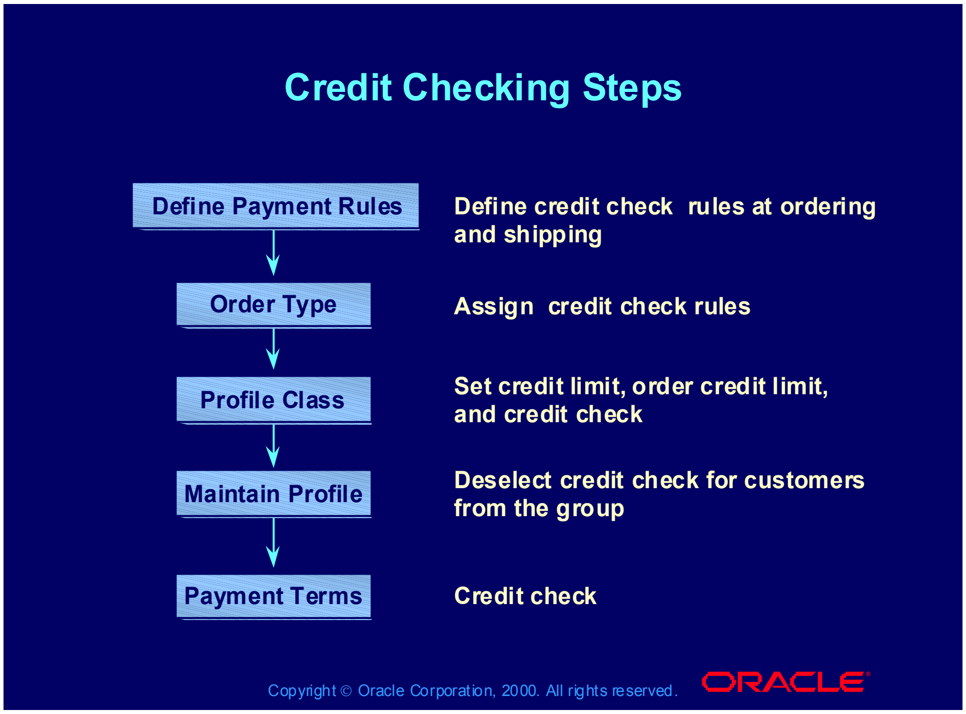


Order Management/Shipping Credit Check

Oracle Order Management/Shipping can perform credit checking at order booking, pick release, or both, and on all or some of your orders, depending on how you define your system. If an order fails credit checking, it is automatically placed on hold. Only responsibilities with the appropriate authority can manually remove a credit check hold.

If you have credit checking activated at order booking and you update the price list, order quantity, order line price, payment terms, or schedule date on a booked order, Oracle Order Management/Shipping automatically performs credit checking, removing, or applying the credit hold as appropriate. If credit checking is activated at pick release, when the order lines are eligible, Oracle Order Management/Shipping checks credit and applies or removes a credit hold as appropriate. Orders on credit hold are not released until the hold is removed.

Credit Checking Steps

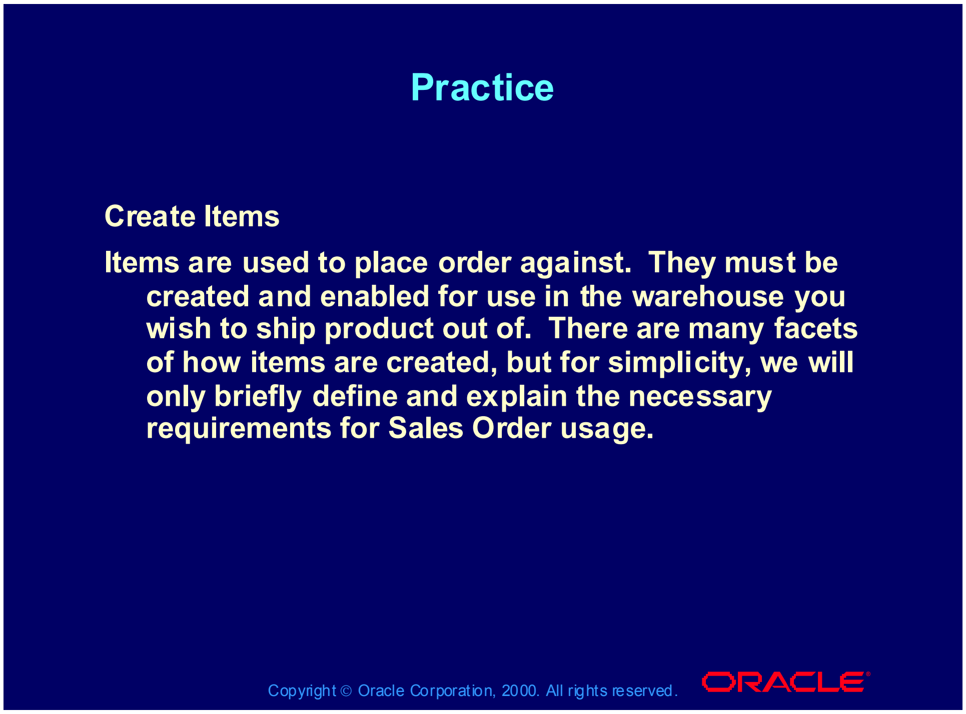


How to Set up Credit Checking

To set up Credit Checking, follow these steps:

- Define credit rules.
- Assign a credit rule and when it will be effective.
- Set the credit limit and order credit limit.
- For particular customers in a group, you may deselect the credit check.
- Set credit checking to apply for specific payment terms.

Practice



(N) Items - Master Items (Note: If organization window appears, select V1-Vision Operations, as Master Organization)

Item: XX-Palm Pilot (where XX is your initials)

Description: PV Palm Pilot

Select (M) Tools > Copy From...

Template: Finished Good

Click (B) Apply then (B) Done.

Save your work.

Select (M) Tools > Organization Assignment

Click the 'Assigned' checkbox for M1-Seattle and M2-Boston Manufacturing.

Save your work. Close the window.

Select (M) File > New

Repeat the above process to create item XX-Phone, XX-Palm Case, and XX-Pager.

Practice

Practice

Process Miscellaneous Receipt Transaction

This lab will have you enter stock into the Seattle and Boston warehouse. This will be needed for Scheduling and shipping needs later on.

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(M) File - Switch Responsibility

Select the Inventory, Vision Operations responsibility from the list.

(N) Transactions - Miscellaneous Transaction

Note: If organization window appears, select M1-Seattle Manufacturing. Ensure that when you enter the Miscellaneous Receipt the organization is M1. If still V1, then Navigate to Change Organization, pick M1 from the list of values and press OK

Date: Defaults

Type: Miscellaneous receipt

Account: 01-520-5250-0000-000. or select Misc. from the Account Aliases (pick list).

Click [B] Transaction Lines

Item: XX-Palm Pilot, Subinventory: FGI, Quantity: 1000

Move cursor to next row belowthe Item field.

Item : XX-Phone, Subinventory: FGI, Quantitiy: 1000

Move cursor to next row belowthe Item field.

Item : XX-Palm Case, Subinventory: FGI, Quantitiy: 1000

Move cursor to next row belowthe Item field.

Item:XX-Pager Subinventory: FGI, Quantitiy: 1000

Save your work.

Change organization to M2 (in Inv reps, Change Organization - select M2-press ok). Repeat step 3 for XX-item1. Save your work.

Return to the OM Superuser responsibility to put the items on a price list (pre-req for being able to put items on a sales order). See following practice.

Move cursor to next row below the Item field.

Item: XX-Palm Case, Subinventory: FGI, Quantity: 1000

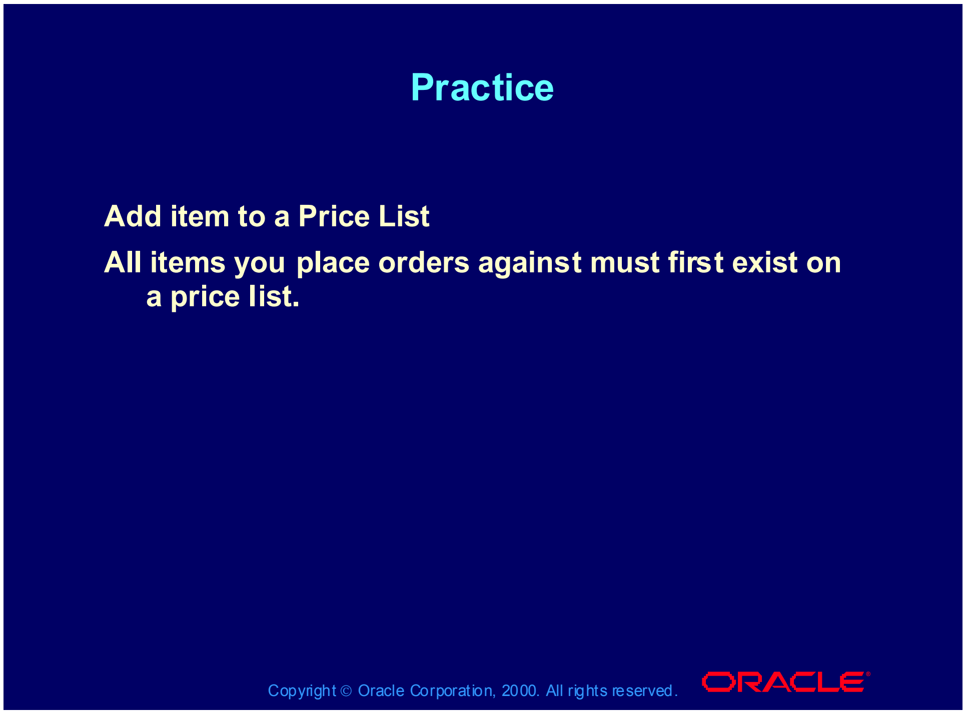
Move cursor to next row below the Item field.

Item: XX-Pager, Subinventory: FGI, Quantity: 15

Save your work.

Change organization to M2 (in Inventory reps., Change Organization - select M2 - press OK). And repeat step 3 for XX-item1. Save your work.

Return to the Order Management SuperUser responsibility to put the items on a price list (pre-requisite for being able to put items on a sales order). See following practice.



OM Superuser, Vision Operations Responsibility.

(N) Pricing - Price Lists - Price List Setup

Query the Corporate Price List

(T) List Lines

Add a record

Select ‘Item’ from LOV in the Product Context field.

Select ‘Item Number’ from LOV in the Product Attribute field.

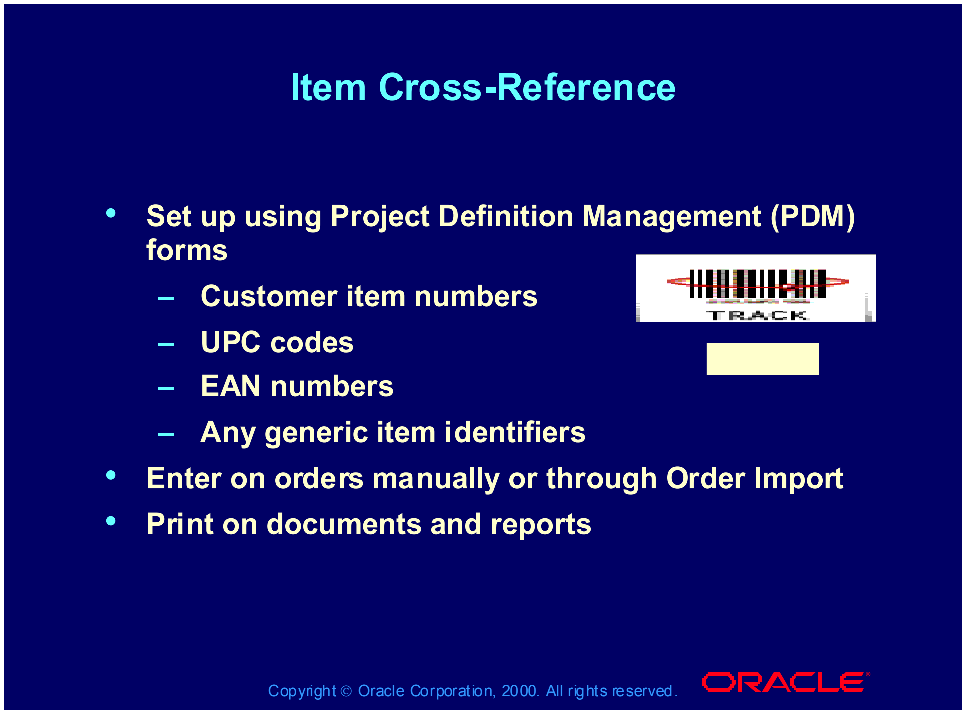
Select ‘XX-Palm Pilot’ (where XX are your initials) from LOV in the Product Value field.

Select ‘Ea’ from LOV in the UOM field. Click the primary UOM box.

Enter 700 in the Value field.

Repeat the steps 3-7 to enter ‘XX-Phone’ and the other items you have created Choose different values for each item.

Save your work.


Item Cross-Reference
• Set up using Project Definition Management (PDM) forms
– Customer item numbers
– UPC codes
– EAN numbers
– Any generic item identifiers
• Enter on orders manually or through Order Import
• Print on documents and reports
TRACK
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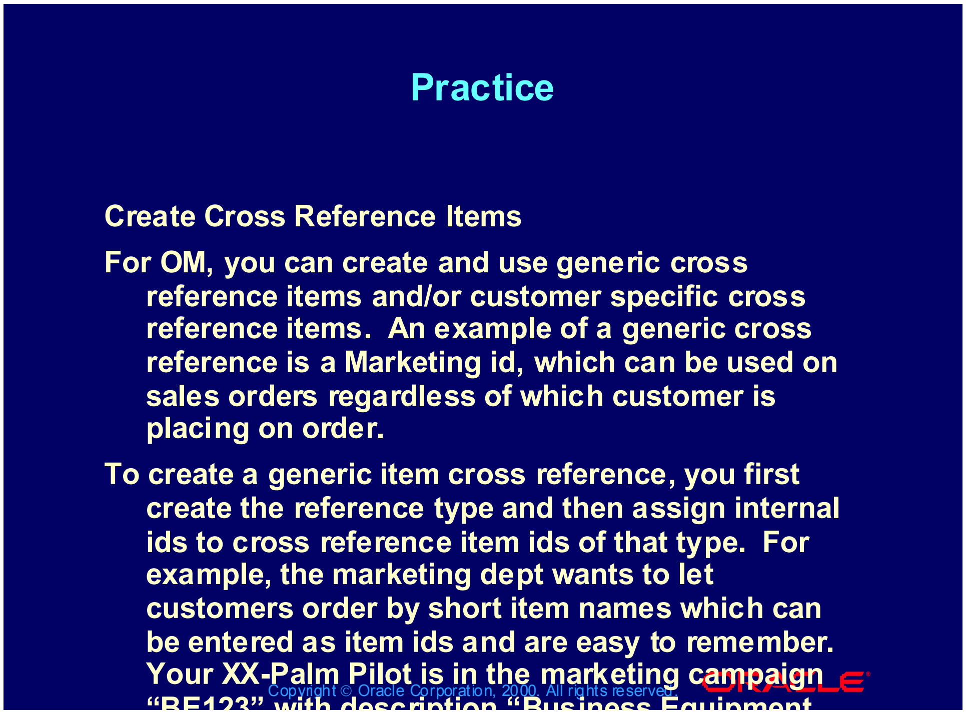
Practice



In “OM Super User, Vision Operations” Responsibility

(N) Items - cross references.

When the Cross reference type windows open, the customer, vendor and substitute reference appear as seeded.

Go to the next available line and enter XXX-Marketing (where XXX are your initials) in the type and in the description field.

Save your record.

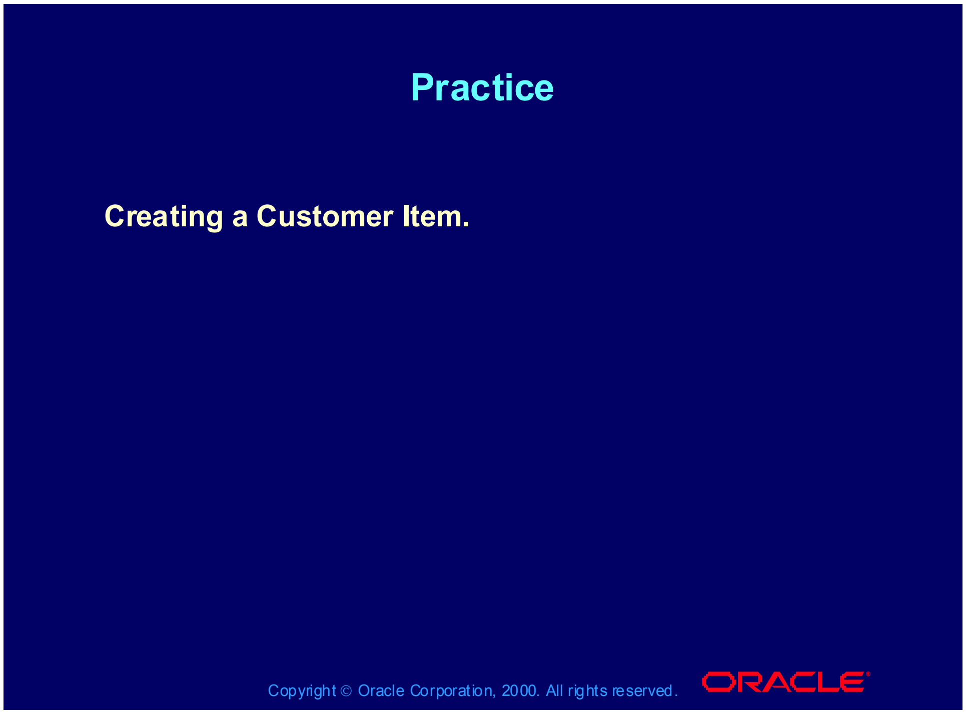
Select the “Assign” button.

In Item field: pick your XX-Palm Pilot.

Applicable to all organizations (checkbox) should default as yes, if not check the box. Enter in the value field XXBE123 (where XX are your initials) and enter in the description “Business Equipment 123”. Go to the next line.

In Item field: pick your XX-Phone. Applicable to all organizations (checkbox) should default as yes, if not check the box. Enter in the value field XXLP100 (where XX are your initials) and enter in the description “Leisure Phone, 100 minutes for free”. Save your work.

Practice



In “OM Super User, Vision Operations” Responsibility

Items - Customer Items - Customer Items.

Select the New button.

In the form linked to the Commodity tab, select XX-Big City Electronics Wholesale from the list of values in the customer name field, enter XX-Multi1 in the Customer item field. Level: should default as Customer, if not, then check the box. Code: use pick and select components.

Go to the next line.

Select XX-Big City Electronics Wholesale from the list of values in the customer name field, enter XX-Multi2 in the Customer item field. Level: should default as Customer, if not, then check the box. Code: use pick and select components.

Save your work and return to the main menu.

To link the customer item to an internal item, navigate to

Items- Customer Items - Customer Item Cross reference.

In the Customer Item field, select from pick list your customer item XX-Multi1.

In item field, use pick and select your item XX-Palm Pilot. Enter 1 in the rank field.

Go to the next line, pick XX-multi2 in the customer item field, XX-Phone in the item field and enter 1 in the rank field.

Save your work and return to the main menu.

Review Question

To enter an order, you can:

1. Manually enter it
2. Copy it
3. Import it
4. All of the above
5. None of the above

Review Question

Review Question

To enter an order, you can:

1. Manually enter it
2. Copy it
3. Import it
4. All of the above
5. None of the above

Agenda

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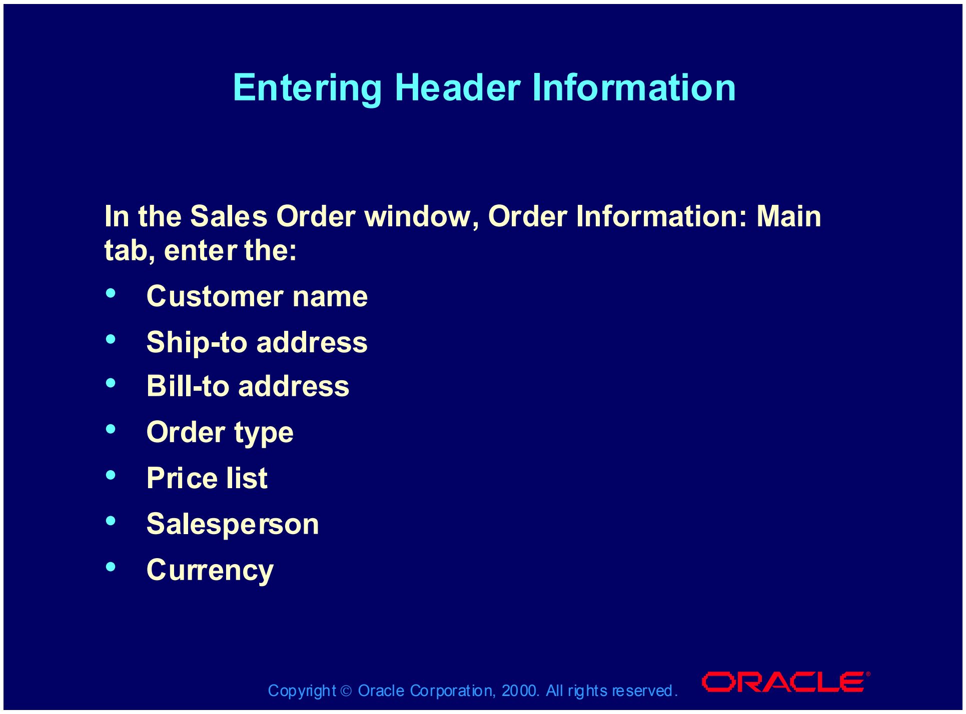
Entering Header Information



(N) Orders, Returns > Sales Orders > (T) Order Information > (T) Main

Select a customer name or a customer number.

Note: You must enter a customer to be able to book an order.

Choose the Ship To and Bill To Addresses.

Select a Ship To location or accept defaulted location

Select a price list for the sales order or accept defaulted price list.

Select a Bill To location or accept defaulted location.

Order numbers are system generated according to the order number source defined for the order type you select in the Order Type field.

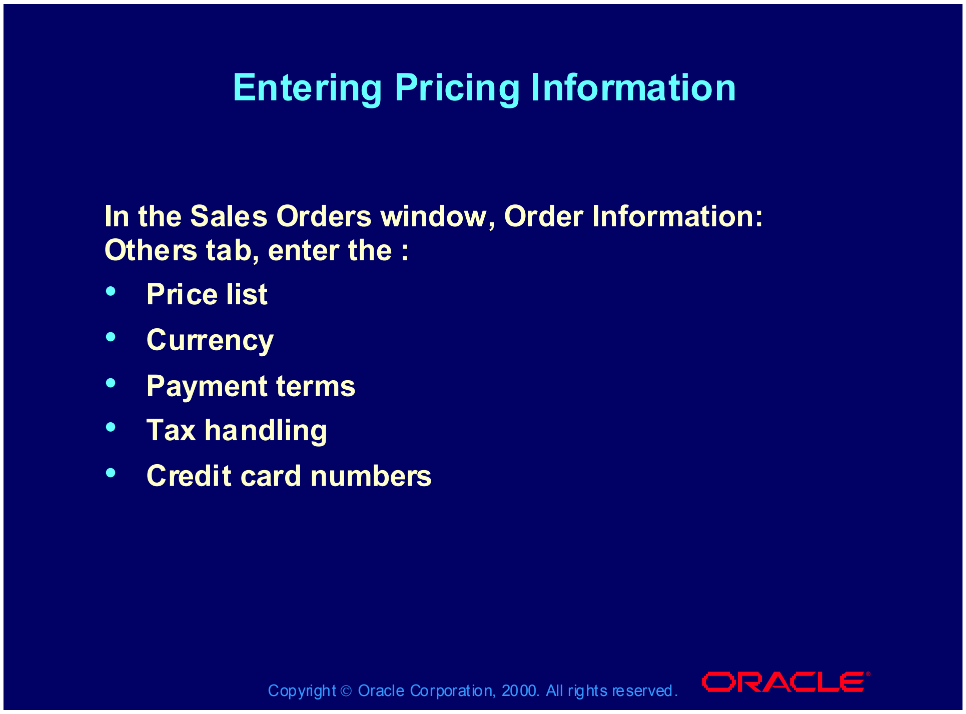
Select an order type for the order.

Note: This selection causes defaults to appear.

Enter the customer's purchase order number for the order or accept the default.

Select a primary salesperson for this order, select a sales channel, and enter or accept the default order date.

Note: Header level information is automatically saved when you navigate to the Lines region.



N) Orders, Returns > Sales Orders > (T) Order Information > (T) Others

Select an agreement for the order (may be optional).

Select a currency for the order or accept the defaults.

Note: The currency on your price list must match the currency you entered for this order, so the values in the list of values are limited to those price lists in the currency you enter in the Currency field.

Select an invoicing rule for the order or accept the default. (This is not required.)

Select the conversion type you want Oracle Order Management/Shipping to use to convert a currency, if your entered currency is different than your functional currency.

Select the payment terms for the order or accept default.

Define the date on which you want a currency conversion to take place.

Note: Oracle Order Management/Shipping defaults the current date in this field.

Select a conversion rate if you entered User in the Conversion Type field.

Select a tax handling status.

You can select from the following:

- Exempt: Indicates that this order is exempt for a normally taxable customer site and (or) item. If you select Exempt, you must enter a certificate number and reason.
- Require: Indicates that this order is taxable for a normally non- taxable customer and (or) item.

- Standard: Indicates that taxation should be based on existing exemption rules. If the customer has a tax exemption defined, Oracle Order Management/Shipping displays any certificate number and reason for the exemption in the corresponding fields.

Select an exiting certificate number (if you chose Exempt in the Tax Handling field) for the Ship To customer or enter a new, unapproved exemption certificate number.

Select a reason (if you chose Exempt in the Tax Handling field) before booking the order.

Processing Credit Cards

Processing Credit Cards

- Based on payment type of credit card
- Integrates with iPayment
- Obtains authorization
- Capability to mask sensitive credit card data
- Payment capture occurs in Oracle Receivables
- Set credit and order limits for:
  - Customer
  - Customer profile class
  - Customer site

Entering Shipping Information

In the Sales Order window, Order Information: Others tab, enter the:

- Shipping instructions
- Shipping method
- Freight terms
- Shipment priority
- Packing instructions

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(N) Orders, Returns > Sales Orders > (T) Order Information > (T) Others

Select a warehouse and a shipment priority (or accept defaults).

Note: Shipment priority allows you to group shipments into different categories of urgency.

Select a freight carrier and the freight terms or accept the default.

Select an FOB point and a demand class or accept the default.

Enter a request date for the order.

Check the Partial Ship check box to allow partial shipments.

Define shipping instructions (they will print on the pick slip) and packing instructions (they will print on the packing slip).

Agenda

Agenda

- Overview
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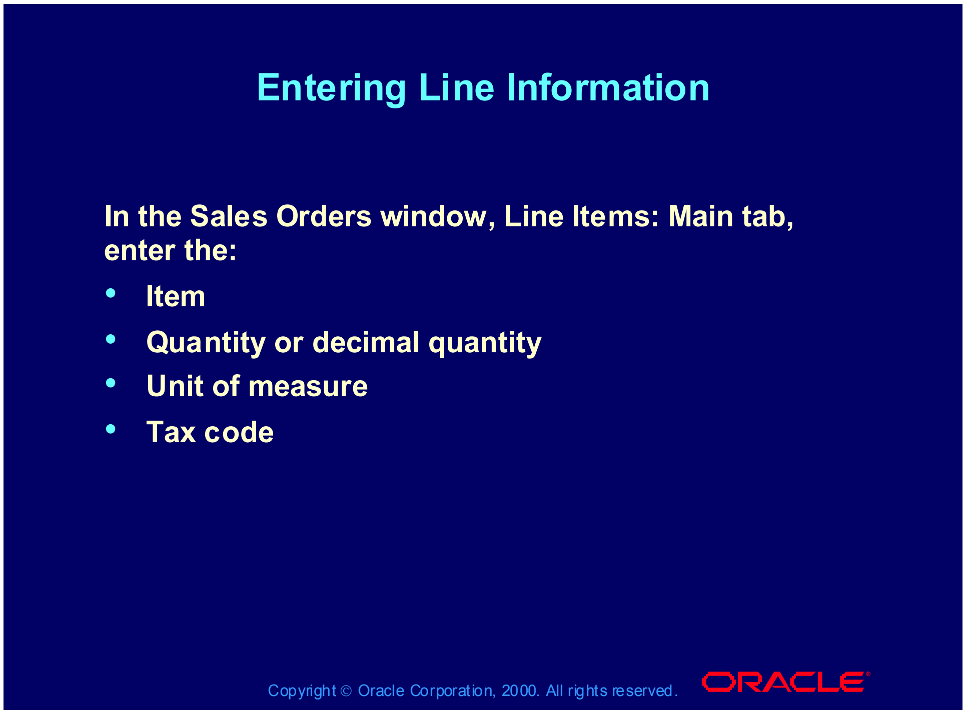
Entering Line Information

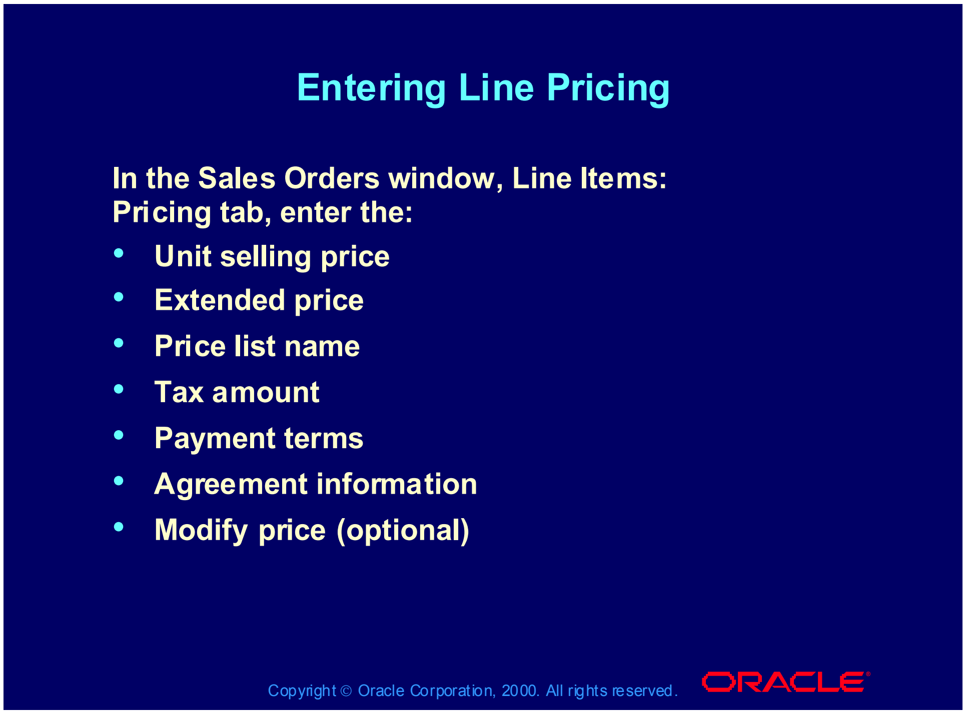


(N) Orders, Returns > Sales Orders > (T) Line Items > (T) Main

(Help) (N) Oracle Order Management > Orders > Sales Orders > Defining Sales Order Line Items Main Information

Alternative Item Entry

If you have cross references in the item master, you can enter a customer item number or a generic item number (such as UPC) in place of the item number.



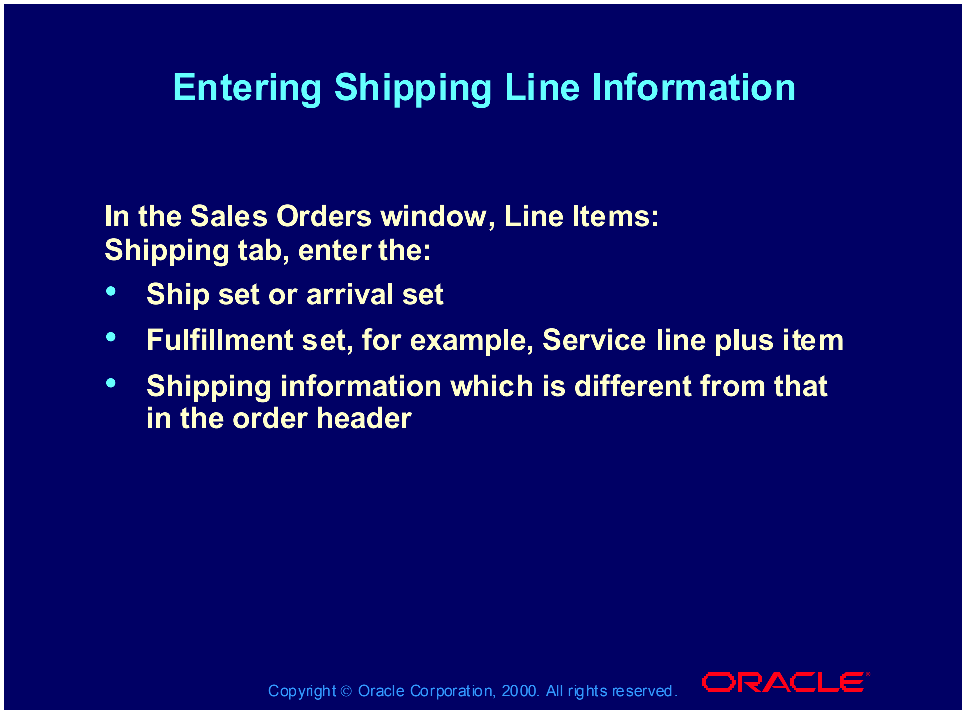
(N) Orders, Returns > Sales Orders > (T) Line Items > (T) Pricing

or

(N) Orders, Returns > Sales Orders > (T) Line Items > (T) Pricing > (B) Action > Adjustments

(Help) (N) Oracle Order Management > Orders > Sales Orders > Defining Sales Order Line Pricing Information

Entering Shipping Line Information



(N) Orders, Returns > Sales Orders > (T) Line Items > (T) Shipping

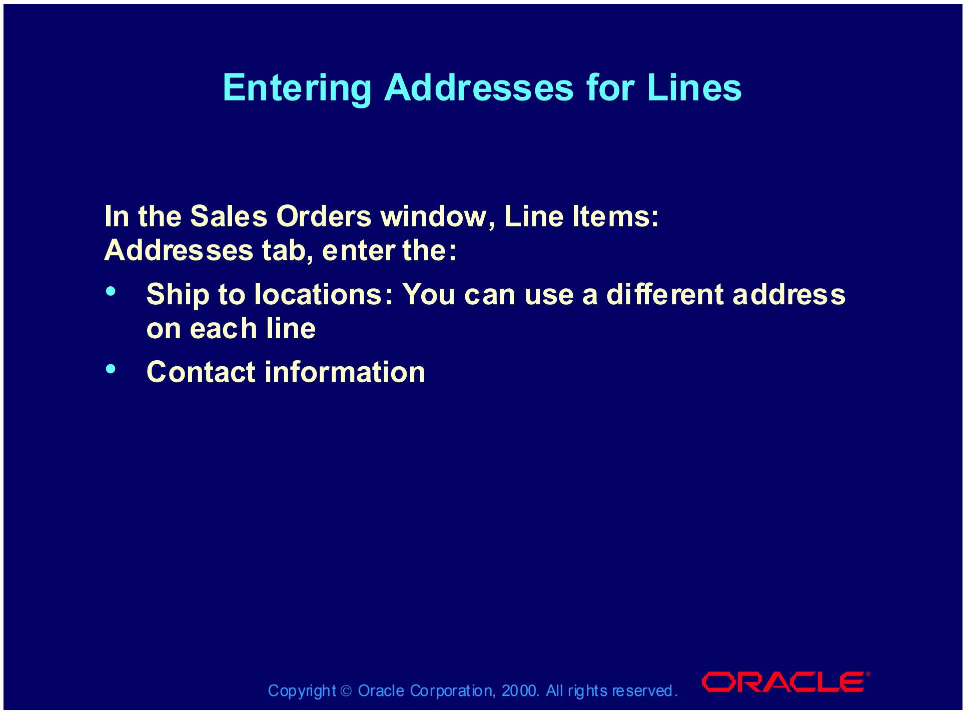
(Help) (N) Oracle Order Management > Orders > Sales Orders > Defining Sales Order Line Shipping Information

Line Sets

You can:

- Have three types of line groupings
  - Ship sets
  - Arrival sets
  - Fulfillment sets
- Automatically put lines into sets
- Change set attributes in Sales Order form
- Shipping can break sets

Entering Addresses for Lines



(N) Orders, Returns > Sales Orders > (T) Line Items > (T) Shipping > (T) Addresses

(Help) (N) Oracle Order Management > Orders > Sales Orders > Defining Sales Order Line Address Information

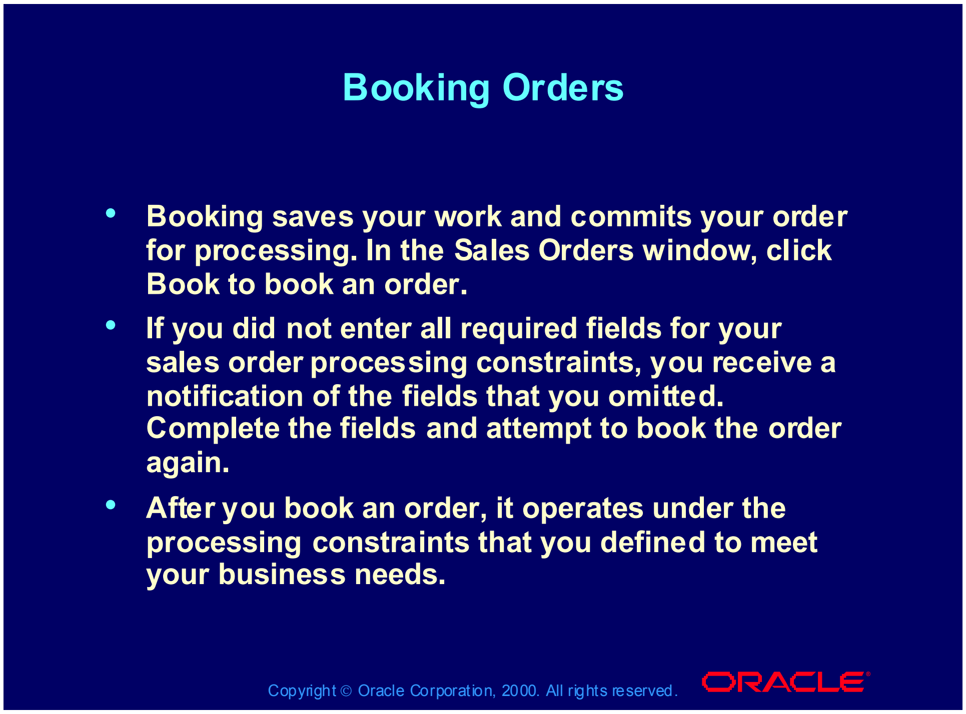
Entering Project Information

In the Sales Orders window, Line Items: Others tab, enter the:

- Project number
- Task number
- Model serial number

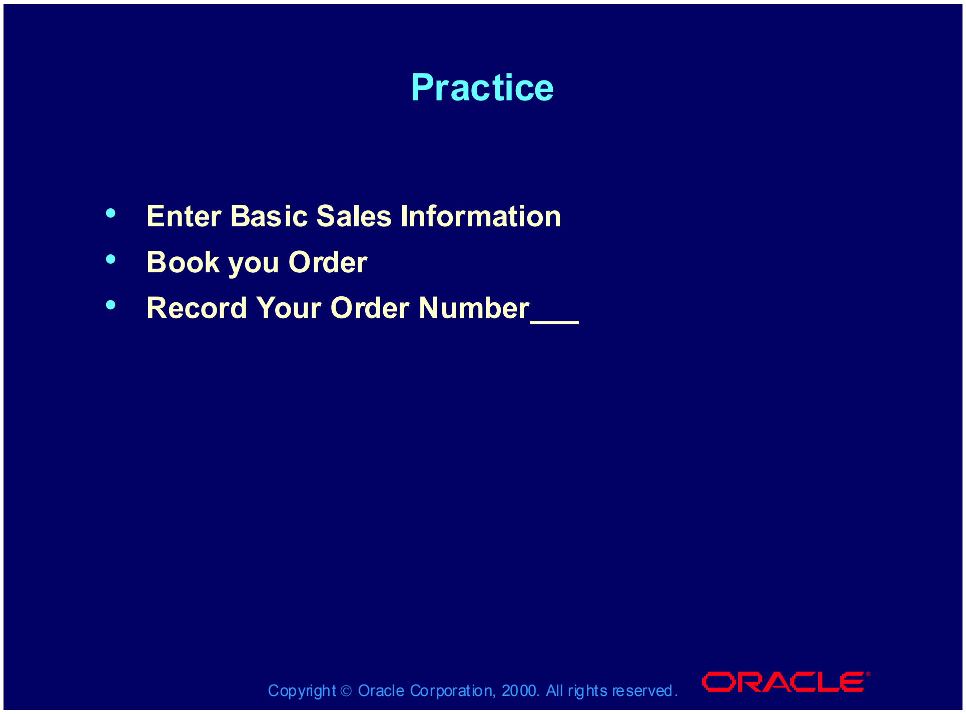
N) Orders, Returns > Sales Orders > (T) Line Items > (T) Others

(Help) (N) Oracle Order Management > Orders > Sales Orders > Defining Sales Order Line Project Manufacturing Information



(N) Orders, Returns > Sales Orders > (B) Book

(Help) (N) Oracle Order Management > Orders > Scheduling > Booking a Sales Order



Practice 11: Enter A Simple Sales Order

(N) Orders,Returns - Sales Orders

Select (T) Order Information and (T) Main
Customer: XX-Big City Electronics Wholesale
Order Type: Order Only
Price List: Corporate
Salesperson: Yours
Select (T) Others
Payment Terms: 30 Net
Shipment Priority: High Priority
Payment Type: Credit Card
Credit Card Type: Visa
Credit Card Number: 2222 3333 4444
Card Holder: Dianne Culver
Card Expiration Date: 26-JUL-2001
Select (T) Line Items and (T) Main
Ordered Item: XX-Palm Pilot

Qty: 5
Ordered Item: XX-Palm Case
Qty: 5
Book your work and note the order number

Applying Sales Credits

Applying Sales Credits

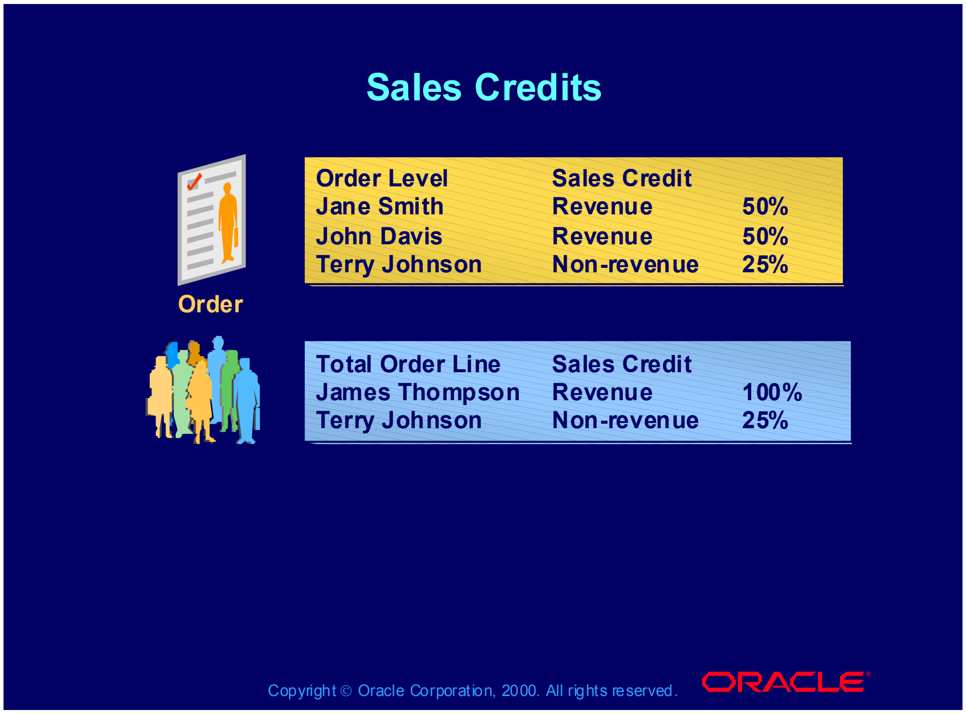
From the Sales Orders window, navigate to the Sales Credits window to enter the:

- Salespersons
- Credit type
- Percentage
- Quota or non-quota

(N) Orders, Returns > Sales Orders > (T) Order Information > (T) Main > (B) Action > Sales Credits

(Help) (N) Oracle Order Management > Orders > Scheduling > Applying Sales Credits

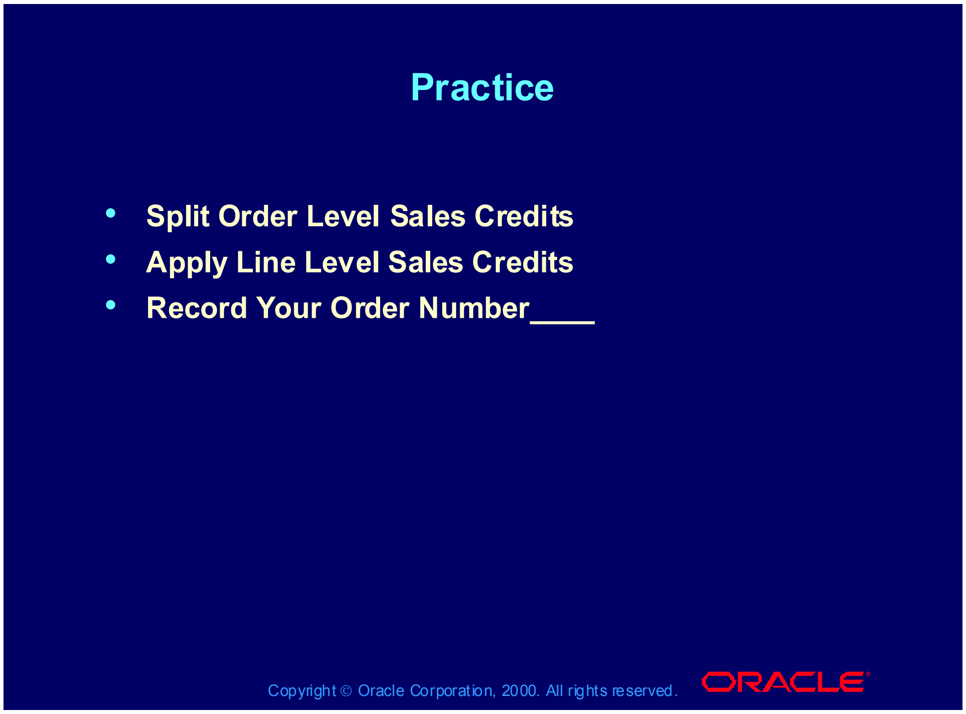
Sales Credits



Applying Credits

You can apply sales credits for an order, line, shipment schedule, or return. Sales credit information for a model line defaults to each option line.

Sales credits are revenue and (or) nonrevenue based. If a salesperson is required, Sales Credit information will default from the Salesperson. You can assign sales credits to salespersons other than the defaulting salesperson for the order. You must enter revenue credits totaling 100% in this window by the time you book the order, if a salesperson is required. You can enter nonrevenue sales credit in any percentage.



Practice 12: Split Sales Credit within a Sales Order

(N) Orders,Returns - Sales Orders

Customer: XX-Big City Electronics Wholesale
Order Type: Order Only
Price List: Corporate
Salesperson: Yours
Select (T) Others
Payment Terms: 30 Net
Shipment Priority: Medium Priority
Click [B] Actions
Select Sales Credit from the list and click [B] OK.
From the Header Sales Credits window.
Change the percentage on your Sales person to 50 %
Move cursor to the next row below Salesperson.
Salesperson: Douglas, Ms.Lisa
Credit Type: Quota Sales Credit
%:   50
Click [B] OK.
Select (T) Line Items and (T) Main

Ordered Item: AS54888

Qty: 10

Click [B] Actions

Select Sales Credit from the list and click [B] OK.

In the Line Sales Credits window.

Salesperson: Lewis, Barry

Credit Type: Non-Quota Sales Credit

%: 25

Click [B] OK.

Ordered Item: XX-Phone

Qty: 5

Book your work and note the order number.

Review Question

Review Question

To enter pricing information, you can use:

1. The Sales Orders window
2. The Adjustments window
3. The Discount window
4. 1 and 2
5. 1 and 3

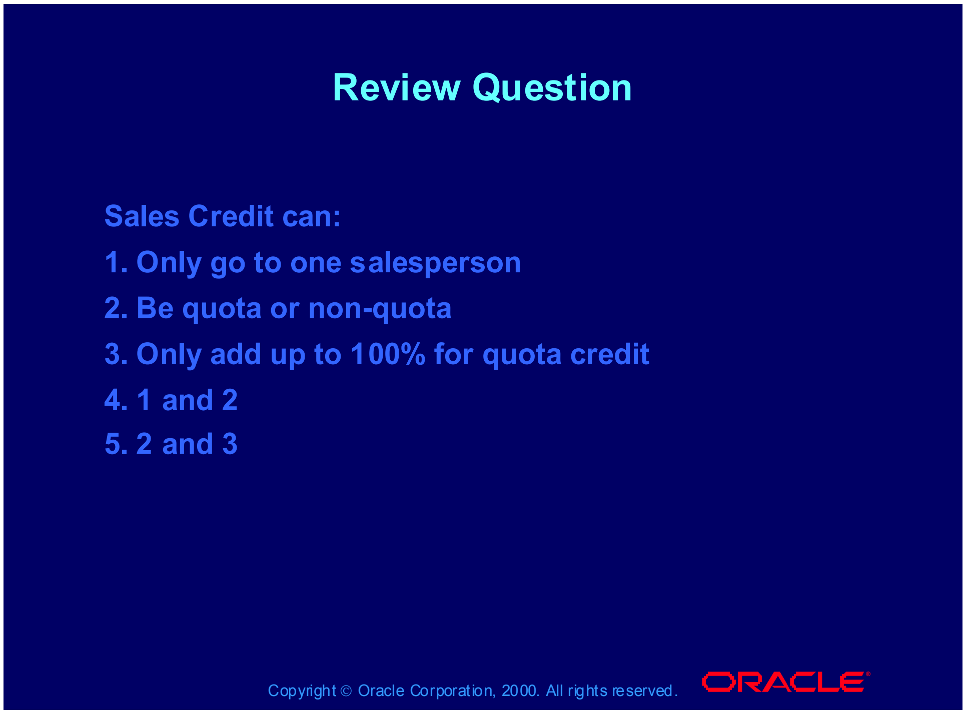
Review Question

Review Question

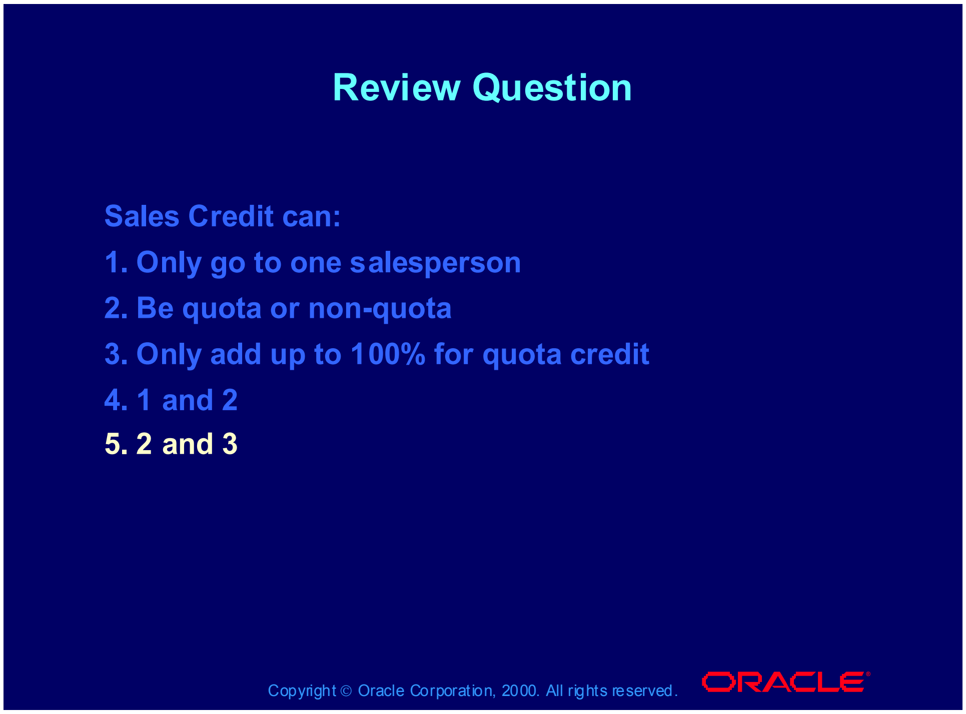
To enter pricing information, you can use:

1. The Sales Orders window
2. The Adjustments window
3. The Discount window
4. 1 and 2
5. 1 and 3

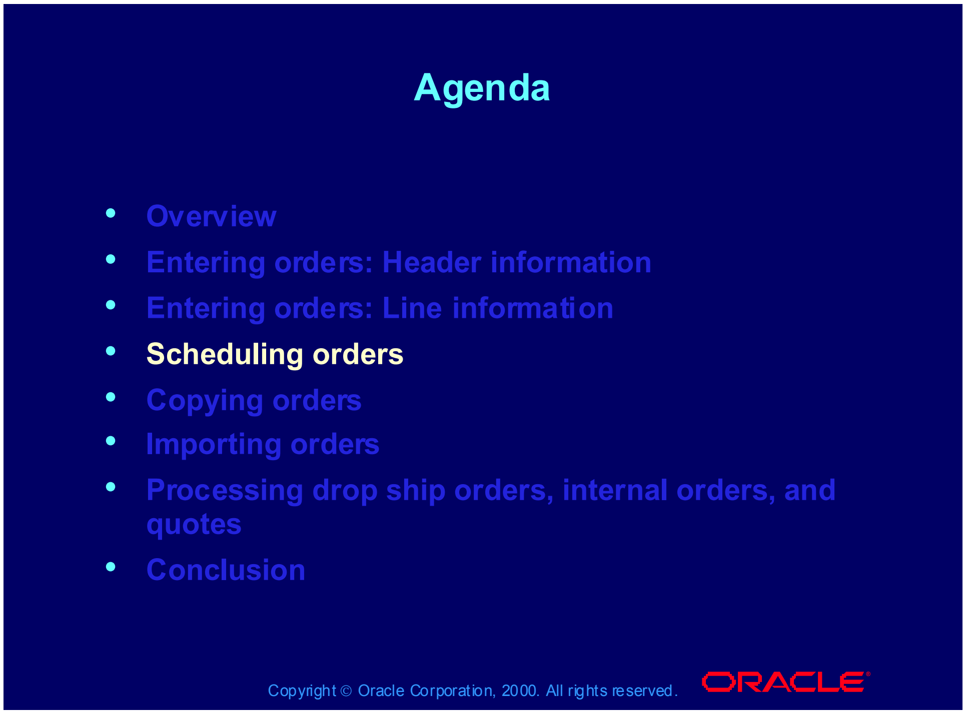
Review Question



Review Question



Agenda


Agenda
• Overview
• Entering orders: Header information
• Entering orders: Line information
• Scheduling orders
• Copying orders
• Importing orders
• Processing drop ship orders, internal orders, and quotes
• Conclusion
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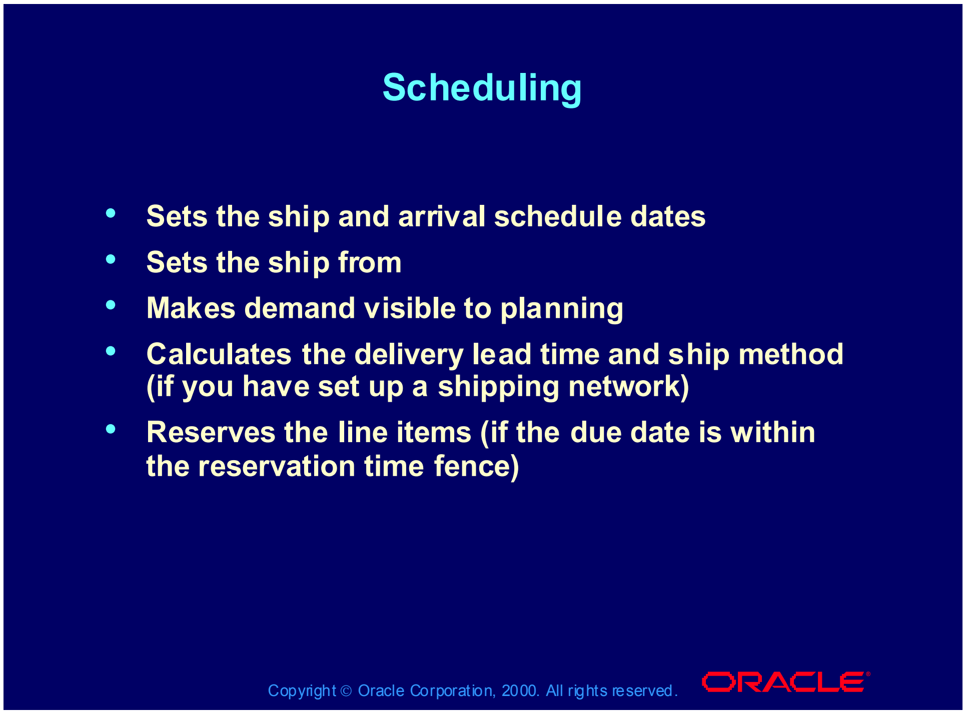
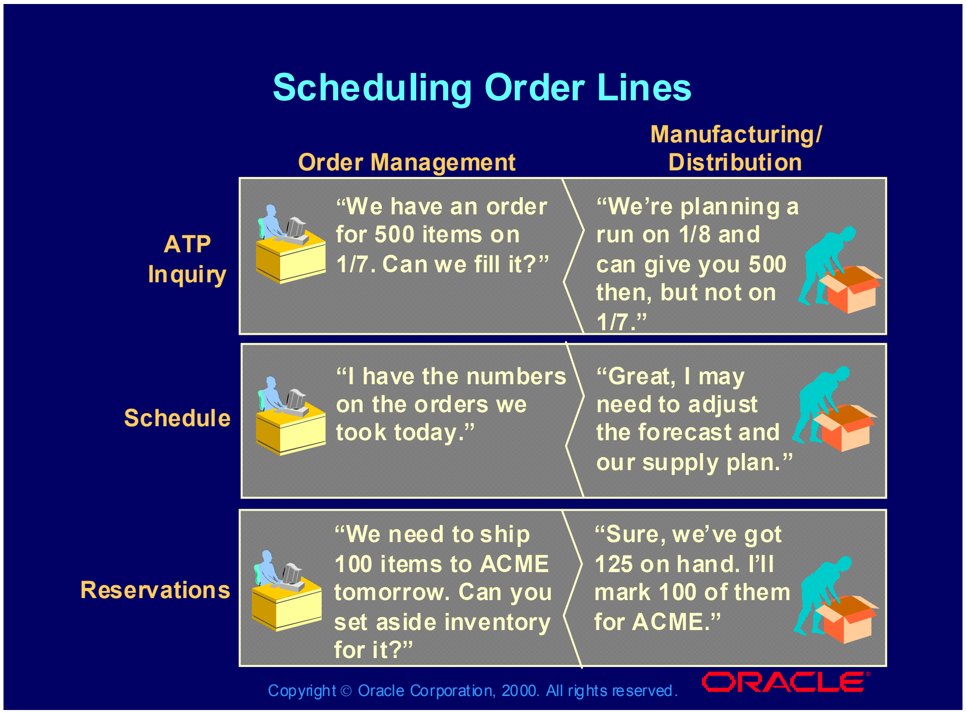
Scheduling



Scheduling Orders Overview

You can schedule an order in the Sales Orders or Schedule Order windows. Scheduling includes performing an Available to Promise (ATP) inquiry, placing demand, or reserving on-hand inventory. You can schedule one of two ways in either window. You can enter your schedule preference in the Schedule Action field on each order line or order line schedule detail, or choose a scheduling action from the Schedule dialog window (choose the Schedule button from any window in these windows). You may want to indicate your scheduling preference on each order line or order line schedule detail when you want to demand some and reserve others. However, if you want to perform the same scheduling action on a group of lines, it is more efficient to use the scheduling actions from the Schedule dialog window.

Scheduling Order Lines



Compare Business Uses for Scheduling

Some businesses need to make delivery commitments to customers while taking orders, so they need to know current or future supply for items.

Some businesses make delivery commitments during order entry and make adjustments prior to shipment to accommodate rush orders or stock shortages.

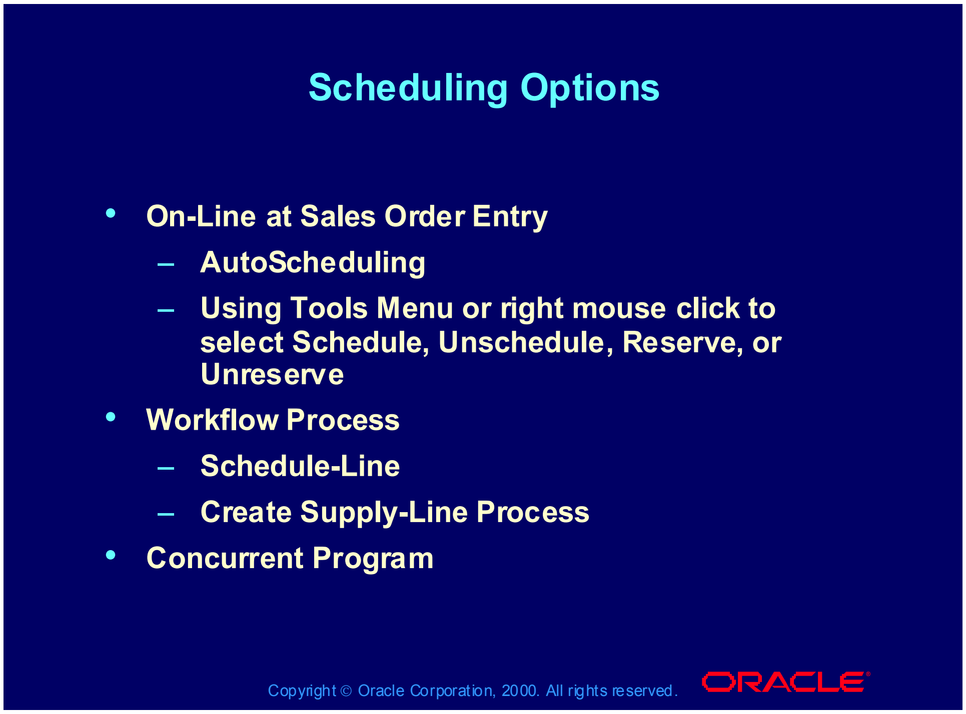
Some businesses need to distribute quantity on-hand between orders to plan for the next day.

Some businesses want to forecast and plan production based on sales order demand.

Some businesses consider company projects when determining scheduling priorities.

Some businesses do not use scheduling.

Scheduling Options



AutoScheduling Feature

AutoScheduling allows you to demand items on a date later than the schedule date, even though the item is not available to promise on the schedule date. By providing a window within a specified day range, the user is able to schedule items that will be available close to the requested date.

A message of "Partial Scheduling Success" is issued to let the user know that the Demand is not placed on the original Schedule Date but on a new date that lies within the schedule date window defined in the Profile Option, OE-Schedule Date Window.

AutoScheduling for Items Not Requiring Group Shipment

Lines of PTO models or kits that are not Ship Model Complete configurations can be demanded on different dates. If the available date is not the original schedule date but falls within the schedule window specified by the profile option, the system will put the new schedule date into line detail schedule dated field.

Note: A Ship Set, Ship-Model-Complete configuration (model or kit) or an ATO model are referred to as Schedule Groups. All the lines and details belonging to the group must have the same schedule date. If autoscheduling a Schedule Group results in a new schedule date, the date is modified on all the lines and details belonging to that group.

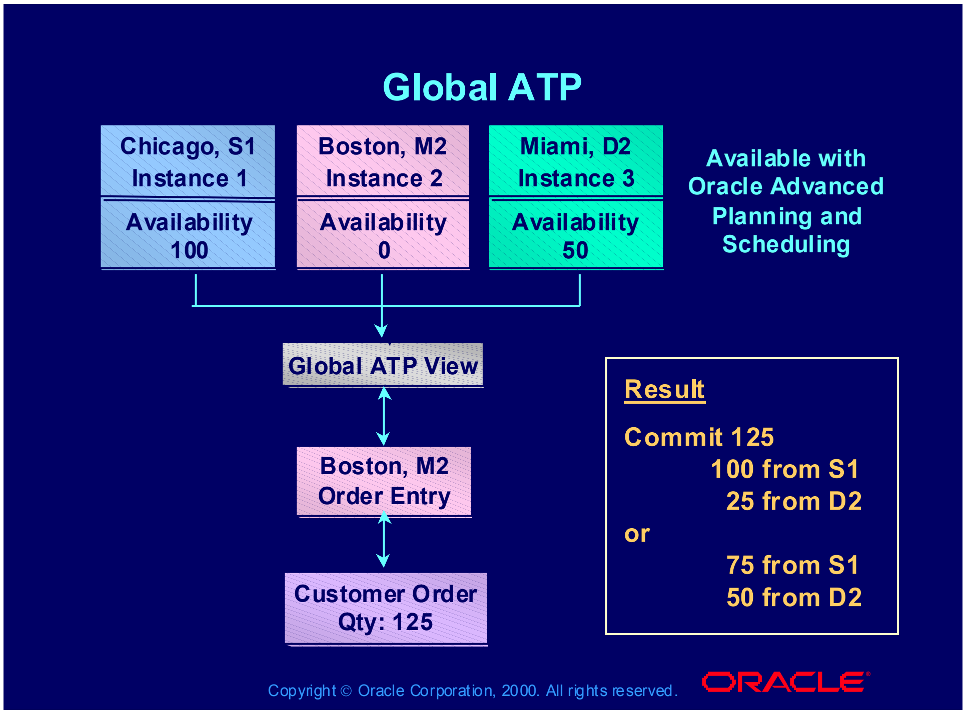
On-line Scheduling

- In the Sales Orders window: Line Items: Shipping tab, enter the Warehouse.
- In the Tools menu, select Autoschedule or click the Availability button. The Availability window displays.
- Select Available to Promise (ATP) and Reserve the Amount
- In the Sales Order window, Line Items: Shipping tab, enter the Scheduled Ship or Arrival Date

(N) Orders, Returns > Sales Orders >(T) Line Items > (T) Shipping > (M)Tools > Autoschedule > (B) Availability

(Help) (N) Oracle Order Management > Scheduling > AutoScheduling Sales Orders

Global ATP



Global ATP
Chicago, S1
Instance 1
Availability
100
Boston, M2
Instance 2
Availability
0
Miami, D2
Instance 3
Availability
50
Available with Oracle Advanced Planning and Scheduling
Global ATP View
Boston, M2
Order Entry
Customer Order
Qty: 125
Result
Commit 125
100 from S1
25 from D2
or
75 from S1
50 from D2
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Practice

Practice

- **Schedule Sales Order Lines**
- **Record your Order Number_____**

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Practice 14: Schedule Order Line

(N) Orders,Returns - Sales Orders (I) Find flashlight

Order Number: Enter your order number from the previous lab.

Click [B] Find

Click [B] Open Order

Select (T) Line Items and (T) Shipping

Highlight Item XX-Item2

Right click on the mouse.

Select (M) Scheduling > Schedule

Notice the Scheduled Ship Date and the Scheduled Arrival Date are populated.

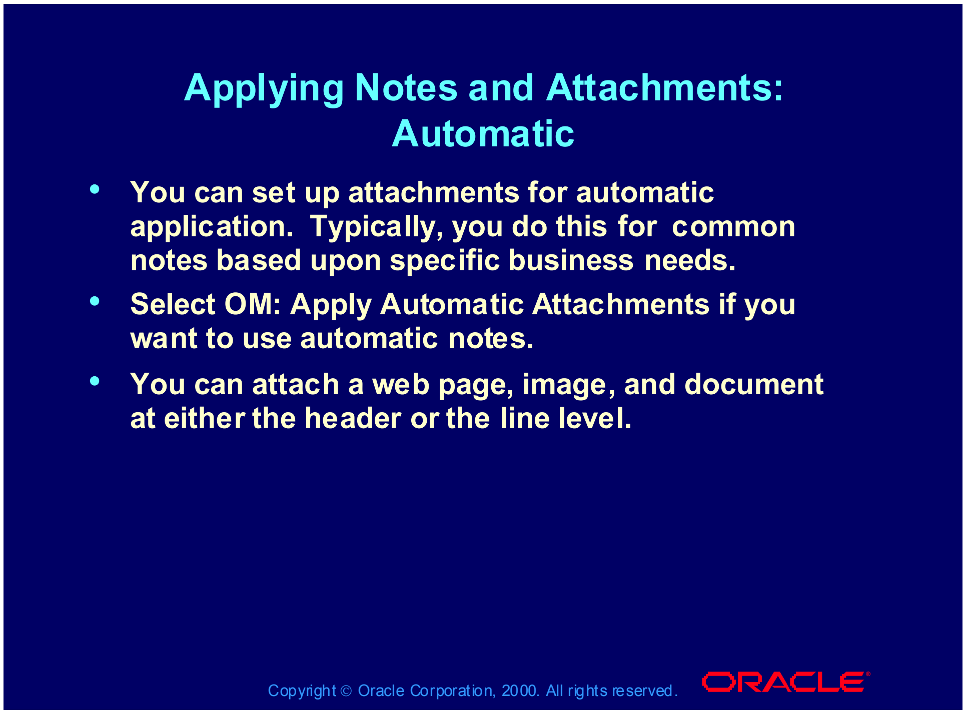
Save your work.

Attachments

Attachments

- Profile option to automatically apply
- Rule based criteria
- Manually create onetime attachments
- Attachments of all data types, including graphics, Web pages, and so on, can be attached
- Will be available for print on customized invoices

Applying Notes and Attachments: Automatic



Attach a web page or image at the header or line level:

(N) Orders, Returns >Sales Orders > (B) Actions > Apply Notes

(Help) (N) Oracle Order Management > Orders > Scheduling > Apply Attachments

Applying Notes and Attachments: Manual

- Use manual note creation to create a note while entering an order:
  - Select the paper clip icon in the toolbar
  - Select a note category and data type
  - Enter a note or link to notes and attachments that you need in this situation
- Set up a note document and set a profile option to automatically apply the note during order entry.

Create a note while entering the order:

(N) Orders, Returns > Sales Orders > (I) Paperclip

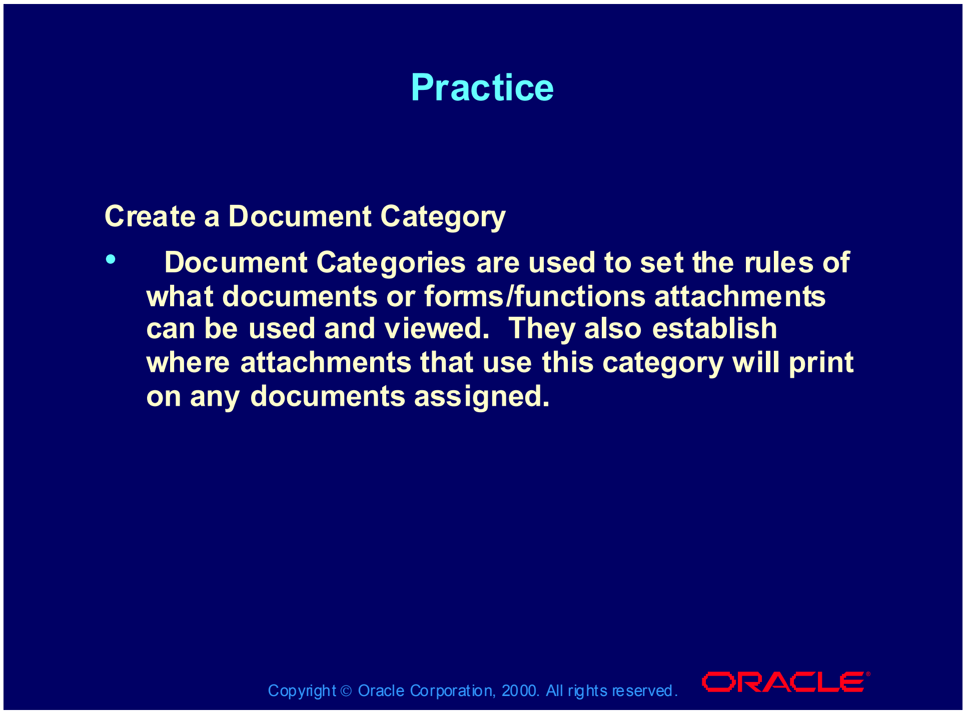
(Help) (N) Oracle Order Management > Orders > Scheduling > Apply Attachments

Set up a note document and a Profile Option to automatically apply the note during order entry:

(N) Setup > Orders > Attachments > Documents

(N) Setup >Profiles

(Help) (N) Oracle Order Management > Setup > Attachments > Defining Documents in Advance



N) Set-up - Orders-Attachments-Document Category

Category = XX-Pick Slip

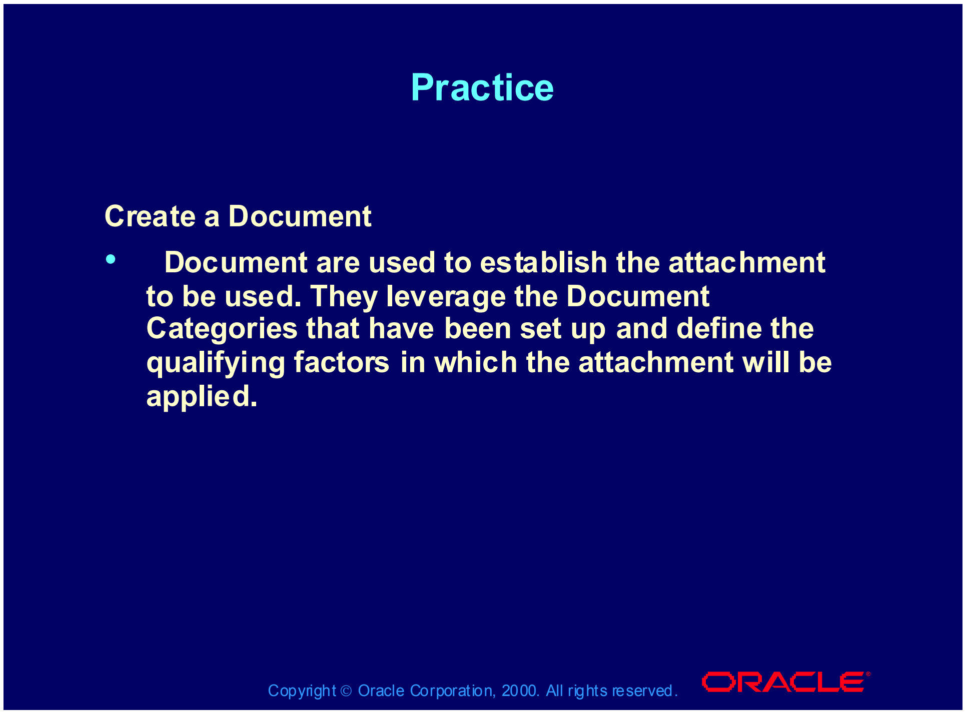
Default Data type = Sort Text

Assignments button

Type = Form

Name = Sales Order

Save



(N) Set-Up- Orders-Attachments-Documents

Category = XX-Pick Slip

Description = Anything

Block = Type in your note.

Addition rules button

Entity = Order Header

Group Number =1

Attribute = Customer

Attribute Value = XX-Big City Electronics

New Record

Group Number = 1

Attribute Value = Order Type

Attribute Value = Mixed

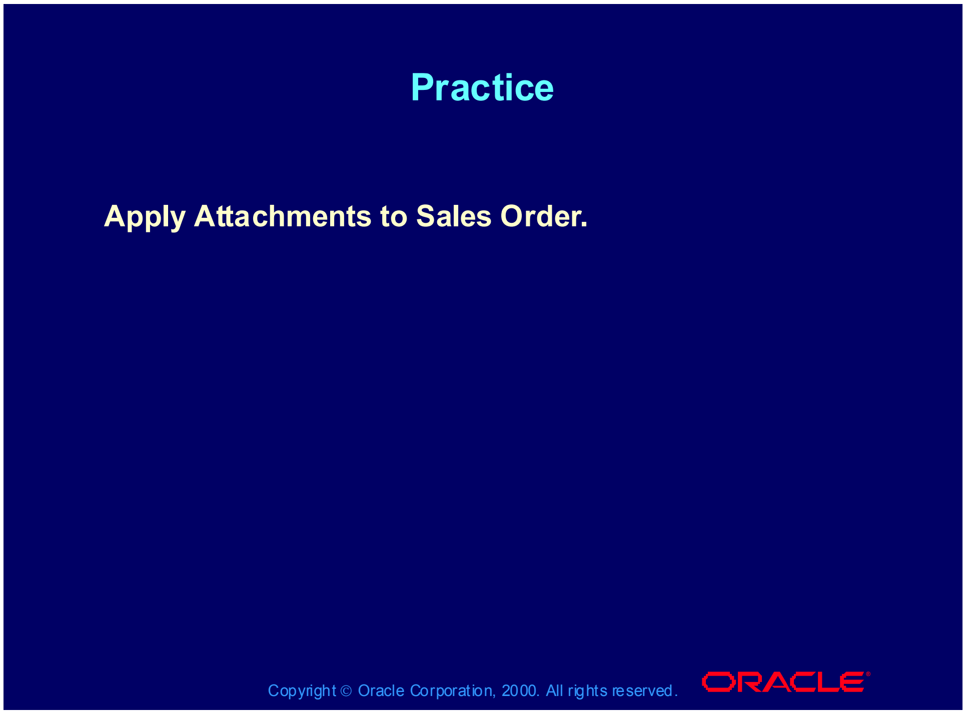
New Record

Group Number = 2

Attribute = Order Category

Attribute Value = Order

Practice



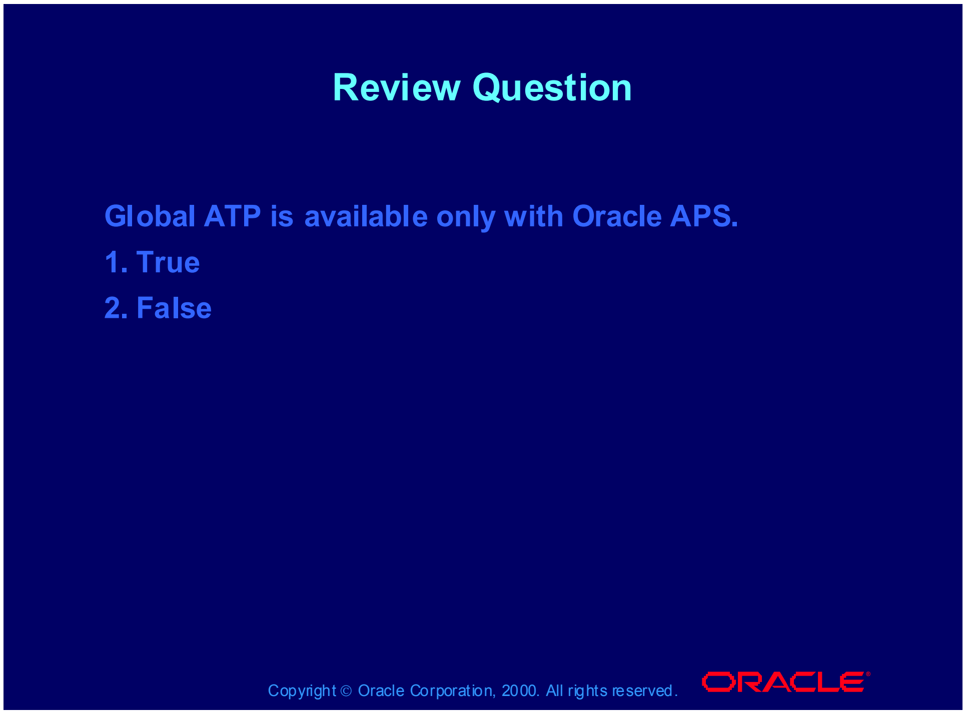
(N) Orders,Returns - Sales Orders

Select (T) Order Information and (T) Main
Customer: XX-Big City Electronics Wholesale
Order Type: Mixed
Price List: Corporate
Salesperson: Yours
Select (T) Others
Payment Terms: 30 Net
Select (T) Line Items and (T) Main
Ordered Item: XX-Palm Pilot
Qty: 5
Ordered Item: XX-Palm Case
Qty: 5
Action - Apply Auto Attachments.
Save your Order
Requery Order by it's number
View Attachment
Book your work and note the order number.

Add an “On the fly” note
Select the Paper Clip Icon
Choose a document category
Give any description
Type in your note

Add a Pre-Defined note
Place you cursor in a new row in the attachments window
Document catalog button
Data type field - short text
Move cursor to record
Preview Attachment
OK button
Attach Button
View Attachments
Save your work and return to the main menu.

Review Question



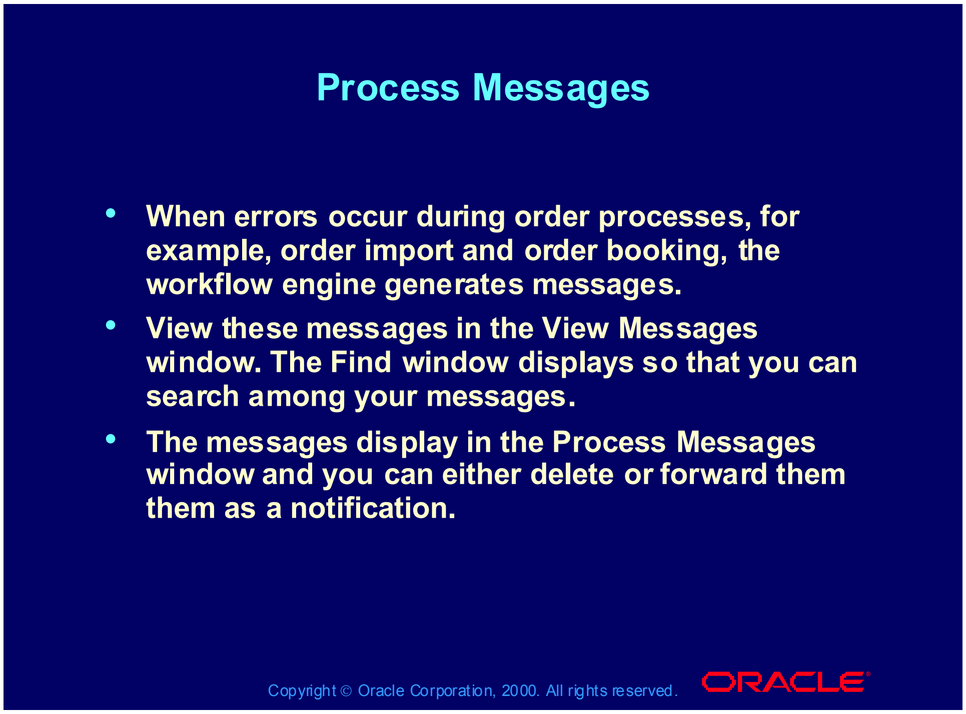
Review Question

Review Question

Global ATP is available only with Oracle APS.

1. True
2. False

Process Messages



(N) Orders, Returns > Process Messages

(Help) (N) Oracle Order Management > Orders > Holds > Process Messages

Agenda

Agenda
• Overview
• Entering orders: Header information
• Entering orders: Line information
• Scheduling and shipping orders
• Copy Orders and Split Lines
• Importing orders
• Processing drop ship orders, internal orders, and quotes
• Conclusion
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Copying Orders

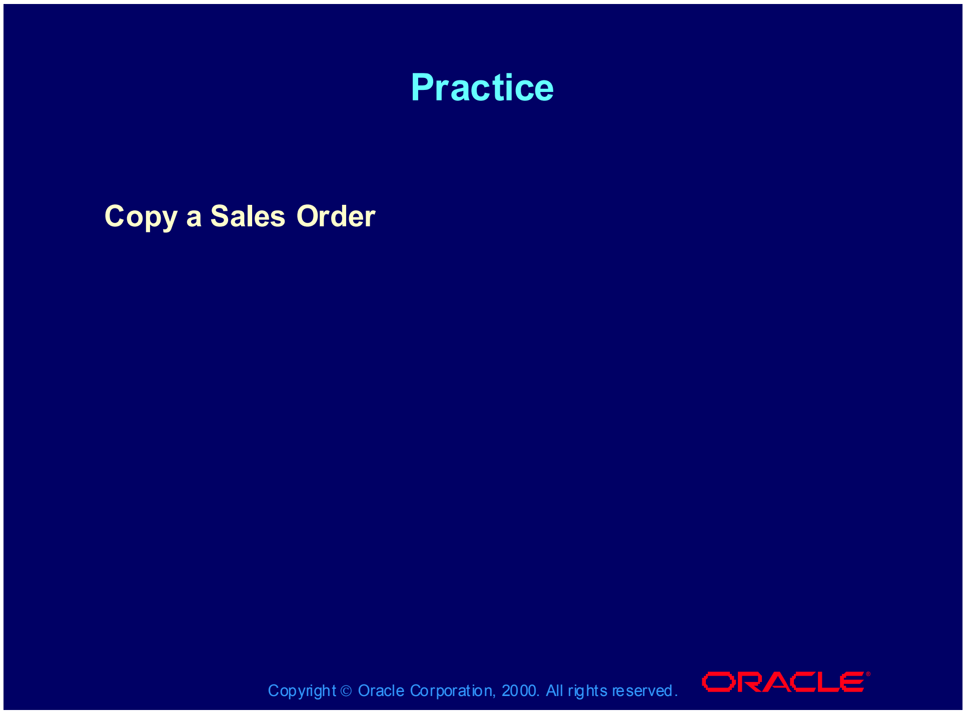
Copying Orders

Use the Copy window to:

- Perform a quick copy
- Copy header
- Copy all or selected lines
- Copy multiple orders into one order (merge)
- Specify pricing options
  - Keep original order price
  - Reprice

(N) Orders, Returns > Sales Orders > (B) Action > Copy

(Help) (N) Oracle Order Management > Orders > Scheduling > Copying Orders



Practice 13: Copy a Sales Order

(N) Orders,Returns - Sales Orders (I) Find flashlight

Order Number: Enter your order number from the previous lab.

Click [B] Find

Click [B] Actions

Select Copy from the list and click [B] OK.

Select (T) Quick Copy and select Create New Order.

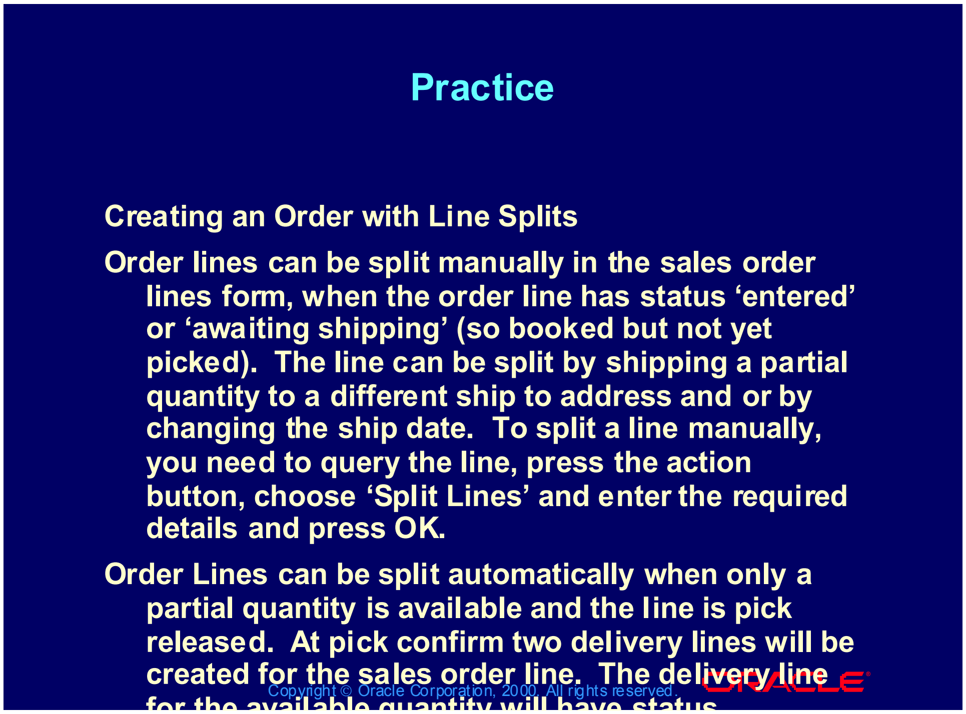
Click [B] OK.

Record your new order number.

Split Lines

- Split order lines to meet business needs. For example, a customer asks you ship part of an order line to a different location or on a different date.
- You can split lines in the Sales Orders form in Oracle Order Management and the Oracle Shipping Transaction form in Shipping Execution.
- To process the split, split the original sales order line and make changes both to it and to the new line.

Practice



(N) Orders,Returns - Sales Orders

Customer: XX-Big City Electronics Wholesale

Order Type: Mixed

Price List: Corporate

Salesperson: Yours

Select (T) Others

Payment Terms: 30 Net

Shipment Priority: Medium Priority

Click [B] Actions

Select Sales Credit from the list and click [B] OK.

From the Header Sales Credits window.

Change the percentage on your Sales person to 50 %

Move cursor to the next row below Salesperson.

Salesperson: Douglas, Ms.Lisa

Credit Type: Quota Sales Credit

%: 50

Click [B] OK.

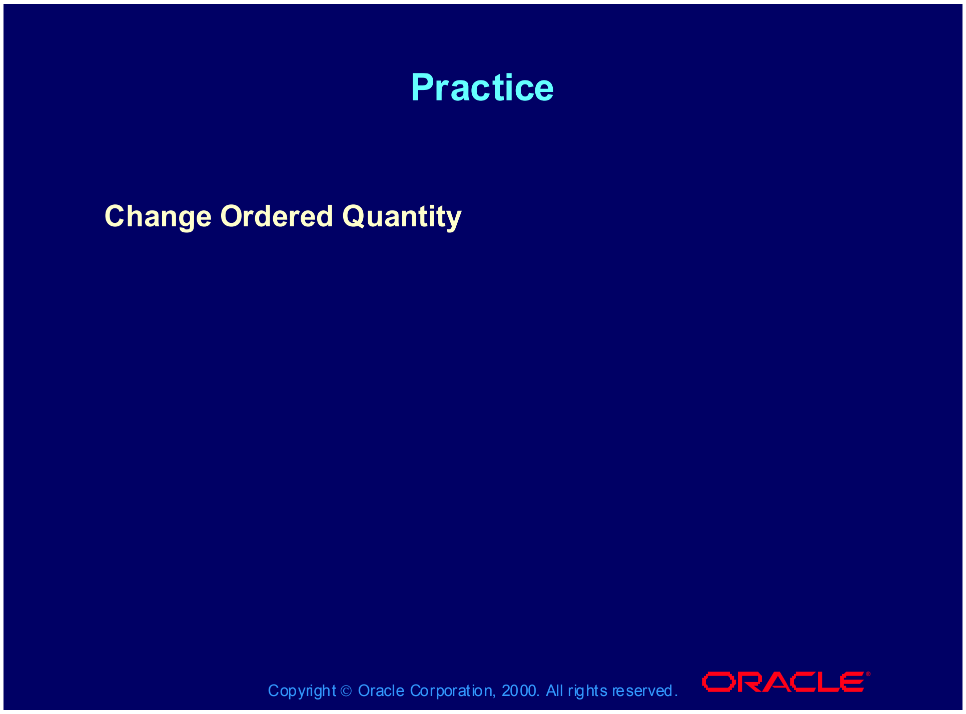
Select (T) Line Items and (T) Main

Ordered Item: AS54888

Qty: 10
Click [B] Actions
Select Sales Credit from the list and click [B] OK.
In the Line Sales Credits window.
Salesperson: Lewis, Barry
Credit Type: Non-Quota Sales Credit
%: 25
Click [B] OK.
Click [B] Actions
Select Split Line from the list and click [B] OK.
In the Line Split Line window.
Split the line accordingly:
Qty 4 Today M1
Qty 3 1 week from today M1
Qty 4 1 week from today M2
Select the Split button

Verify your line now has the following Line numbering 1.1 qty 4, 1.2 qty 3, 1.3 qty 4
Book your work and note the order number.

Practice



(N) Orders,Returns - Sales Orders

Customer: XX-Big City Electronics Wholesale
Order Type: Mixed
Price List: Corporate
Salesperson: Yours
Select (T) Others
Payment Terms: 30 Net
Shipment Priority: Medium Priority
Select (T) Line Items and (T) Main
Ordered Item: Phone
Qty: 5
Save
Change the quantity to 3
Save The system will prompt you for a reason.
In the Line Main Tab, Find the reason field and choose one from the LOV
Save
Click [B] Actions
Select Additional Line Information from the list and click [B] OK.
Quantity History Change Tab

View the change information
Book your work and note the order number

Practice

Order Cross Referenced Items

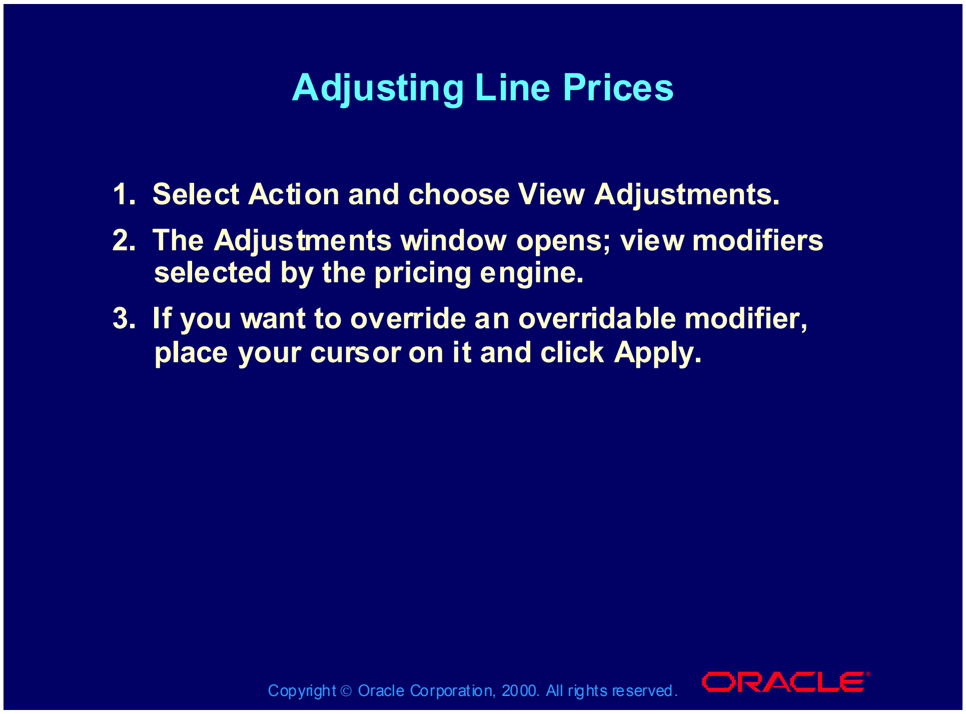
To test your item Cross Reference setups, create a sales order for your customer, and in the sales order line field, enter XX% and tab. The list of values will show 6 options: 2 inventory item codes or internal item ids, 2 generic cross reference items and 2 customer specific cross reference items.

(N) Orders,Returns - Sales Orders

Select (T) Order Information and (T) Main
Customer: Quick 1
Order Type: Mixed
Price List: Corporate
Salesperson: Yours
Select (T) Others
Payment Terms: 30 Net
Select (T) Line Items and (T) Main
Ordered Item: XXBE123 (Cross Referenced from your XX-Palm Pilot)
Qty: 5
Ordered Item : XXLP100 (Cross Referenced from your XX-Phone)
Book your work and note the order number.
Create a new record for a new sales order
Customer: XX-Big City Electronics Wholesale
Order Type: Mixed
Price List: Corporate
Salesperson: Yours
Select (T) Others

Payment Terms: 30 Net
Select (T) Line Items and (T) Main
Ordered Item: XX-Multi 1 (Customer Number for your XX-Palm Pilot)
Qty: 5
Ordered Item : XX- Multi2 (Customer Number for your XX-Phone)
Book your work and note the order number.

Adjusting Line Prices



(N) Orders, Returns > Sales Orders > (T) Line Items > (T) Pricing

or

(N) Orders, Returns > Sales Orders > (T) Line Items > (T) Pricing > (B) Action > Adjustments

(Help) (N) Oracle Order Management > Orders > Sales Orders > Defining Sales Order Line Pricing Information

Practice

Practice

Apply a manual modifier to a sales order

Adjustments to sales order are referred to as Modifiers, they can be discounts, freight or special charges or promotions. They may be set up to apply automatically or by manual application. This lab demonstrates how to manually apply a modifier to a sales order line item.

Note: in order to apply manual modifiers, profile option “OM:Charging Privilege” must be set to “Full Access”.

(N) Orders,Returns - Sales Orders

Select (T) Order Information and (T) Main

Customer: XX-Big City Electronics Wholesale

Order Type: Mixed

Price List: Corporate

Salesperson: Yours

Select (T) Others

Payment Terms: 30 Net

Select (T) Line Items and (T) Main

Ordered Item: XX-Palm Pilot

Qty: 5

Click [B] Actions

Select View Adjustments from the list and click [B] OK.

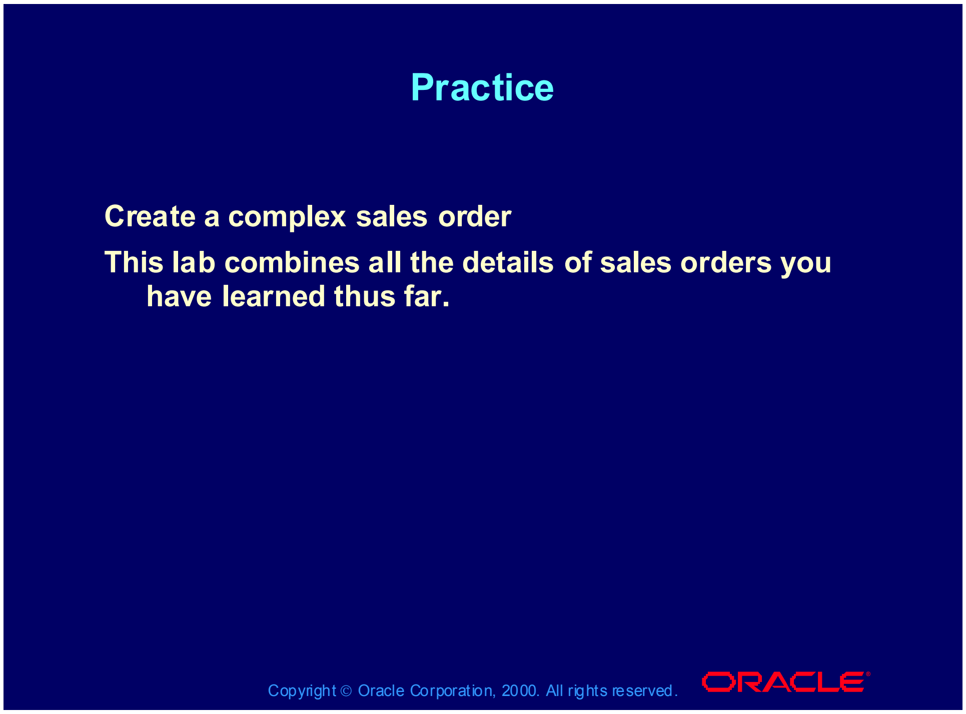
In the Adjustments window.

Modifier Name = Select any Manual created Modifier from a LOV

Select the Apply Button

Book your work and note the order number.

Practice



(N) Orders,Returns - Sales Orders

Customer: XX-Big City Electronics Wholesale

Order Type: Mixed

Price List: Corporate

Salesperson: Yours

Select (T) Others

Payment Terms: 30 Net

Shipment Priority: Medium Priority

Click [B] Actions

Select Sales Credit from the list and click [B] OK.

From the Header Sales Credits window.

Change the percentage on your Sales person to 50 %

Move cursor to the next row below Salesperson.

Salesperson: Douglas, Ms.Lisa

Credit Type: Quota Sales Credit

%:   50

Click [B] OK.

Select (T) Line Items and (T) Main

Ordered Item: AS54888

Qty: 10

Click [B] Actions

Select Sales Credit from the list and click [B] OK.

In the Line Sales Credits window.

Salesperson: Lewis, Barry

Credit Type: Non-Quota Sales Credit

%: 25

Click [B] OK.

Click [B] Actions

Select Split Line from the list and click [B] OK.

In the Line Split Line window.

Split the line accordingly:

Qty 4 Today M1

Qty 3 1 week from today M1

Qty 4 1 week from today M2

Select the Split button

Ordered Item: XX-Palm Pilot

Qty: 10

Add an “On the fly” note

Select the Paper Clip Icon

Choose a document category

Give any description

Type in your note

Ordered Item: XXBE123 (Cross Referenced from your XX-Palm Pilot)

Qty: 5

Click [B] Actions

Select View Adjustments from the list and click [B] OK.

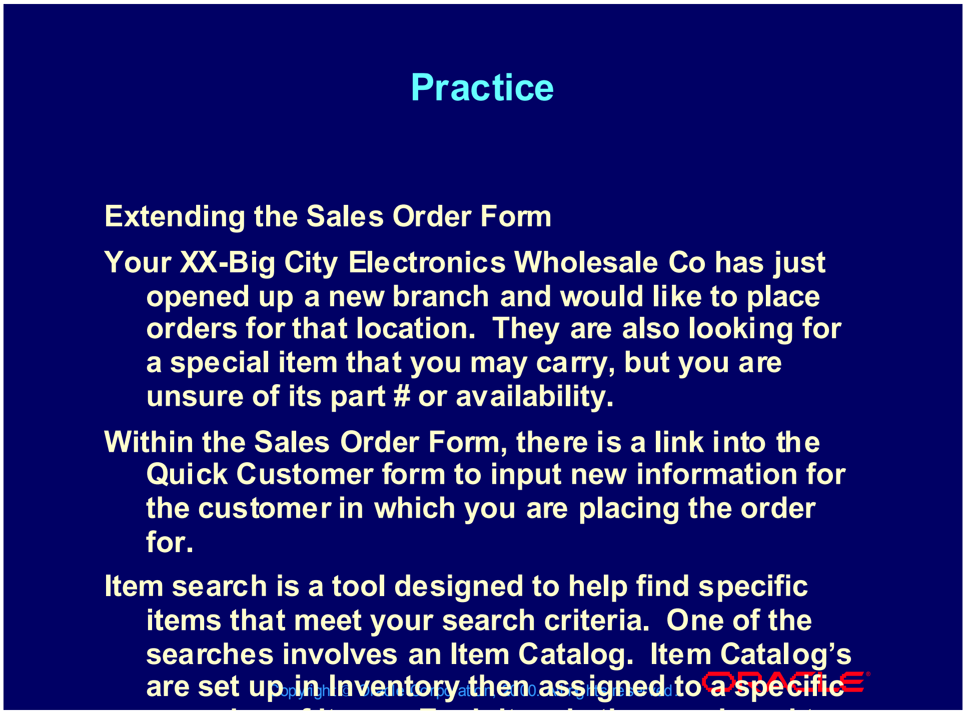
In the Adjustments window.

Modifier Name = Select any Manual created Modifier from a LOV

Select the Apply Button

Book your work and note the order number

Practice



(N) Orders,Returns - Sales Orders

Select (T) Order Information and (T) Main

Customer: XX-Big City Electronics Wholesale

Tools - Quick Customer

Find = XX- Big City Electronics Wholesale

New Address = 5401 Wacker Avenue Chicago, IL 60606

Order Type: Mixed

Price List: Corporate

Salesperson: Yours

Select (T) Line Items and (T) Main

Ordered Item: XX-Palm Pilot

Qty: 5

Ordered Item: XX-Palm Case

Qty: 5

Ordered Item: CM13139

Qty: 5

Ordered Item: 19 " Monitor Part Number = ?

(M) Tools - Item Search

Catalog Drop Down List

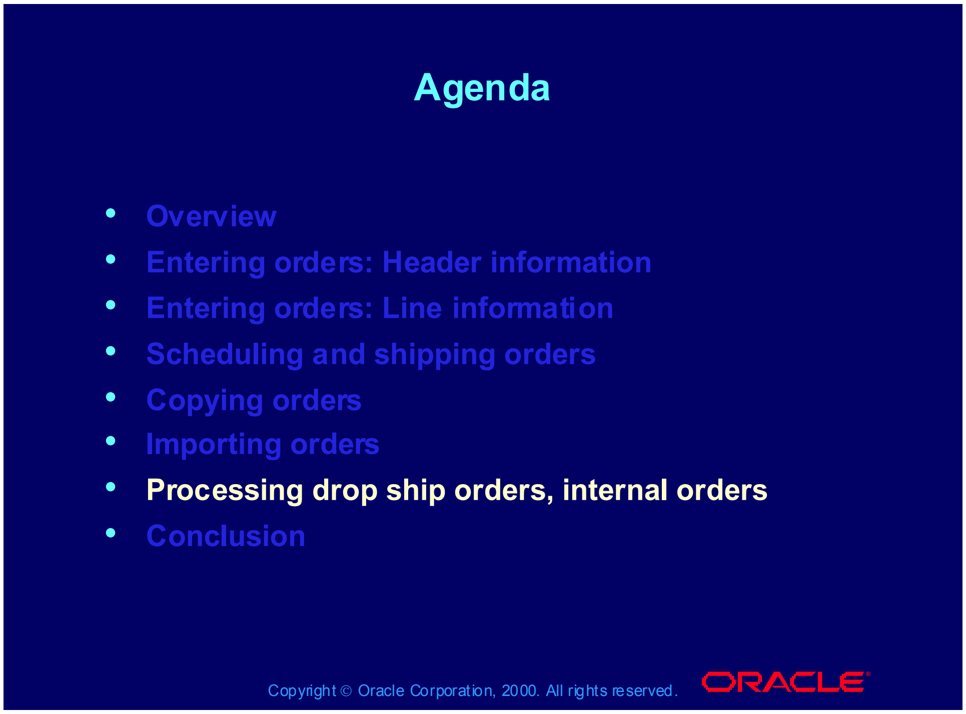
Catalog = Monitors
Size = 19”
Select the Show Quantity checkbox
Find
View the results, and Highlight a resulted item,
Copy the item with your left mouse function
Paste the item number back into the sales order form as an Ordered Item
Qty: 3
Book your work and note the order number.
In the Sales Order Header
Verify that Status of your Order is Booked in the Order Tab
View the associated Order Level workflow
(M) Tools - Workflow Monitor
Click View Diagram

The Forms Server will load the required information in a HTML page for Viewing (approx. 1-2 minutes) This will only occur each time a user has logged into a session.
View the Header Level workflow diagram, close the window and return to the sales order form.
Select the Lines Tab
Verify that the status of your sales order lines are: Awaiting Shipping
View the associated Line Level workflow
(M) Tools - Workflow Monitor
Click View Diagram
The Forms Server will load much faster this time.

View the Line Level workflow diagram, close the window and return to the sales order form.

How did the Header and Line Level workflows differ?

Agenda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• Processing drop ship orders, internal orders
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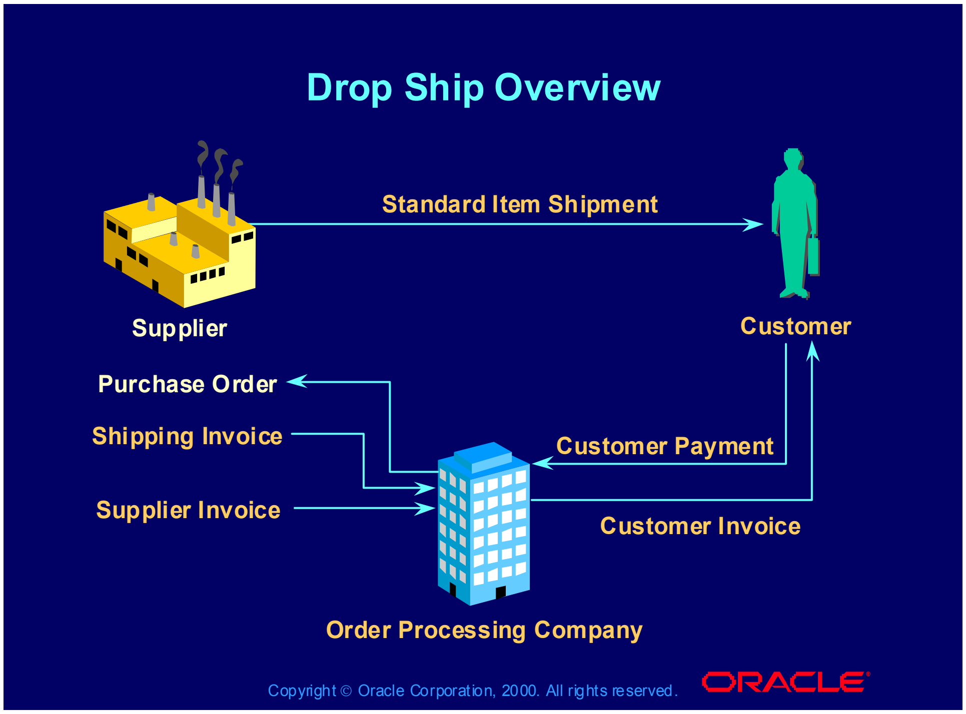
Drop Ship Overview



Overview of Drop Ship Order Process

Drop ship order items ship directly from a supplier to the customer of the order processing company. A purchase requisition, then a purchase order, is generated to notify the supplier of the requirement. After the supplier ships the order, it notifies Purchasing to enter this information in the Purchasing module. Then a regularly scheduled automatic interface updates the sales order with this data.

You can enter, view, and update drop ship orders using the Oracle Order Management functions. You can use the Order Management screen to designate a drop ship order by entering a drop ship order type, an external source type to show that this will ship from a supplier instead of internally, and a receiving organization instead of a warehouse. Only items which have been flagged as purchasable in the inventory module are eligible for drop shipment.

You can pass the drop ship orders to Purchasing. Purchasing will create a Purchase Order to send to the supplier. Upon notification from the supplier of completion of the drop shipment, Purchasing will enter the receipt information in the system so that the sales order can be passed to Accounts Receivables invoicing by way of the Order Management module.

Drop Ship Information

- Single point of maintenance for customer addresses and locations.
- Processing controlled by workflows (replaces Purchase Release concurrent process).

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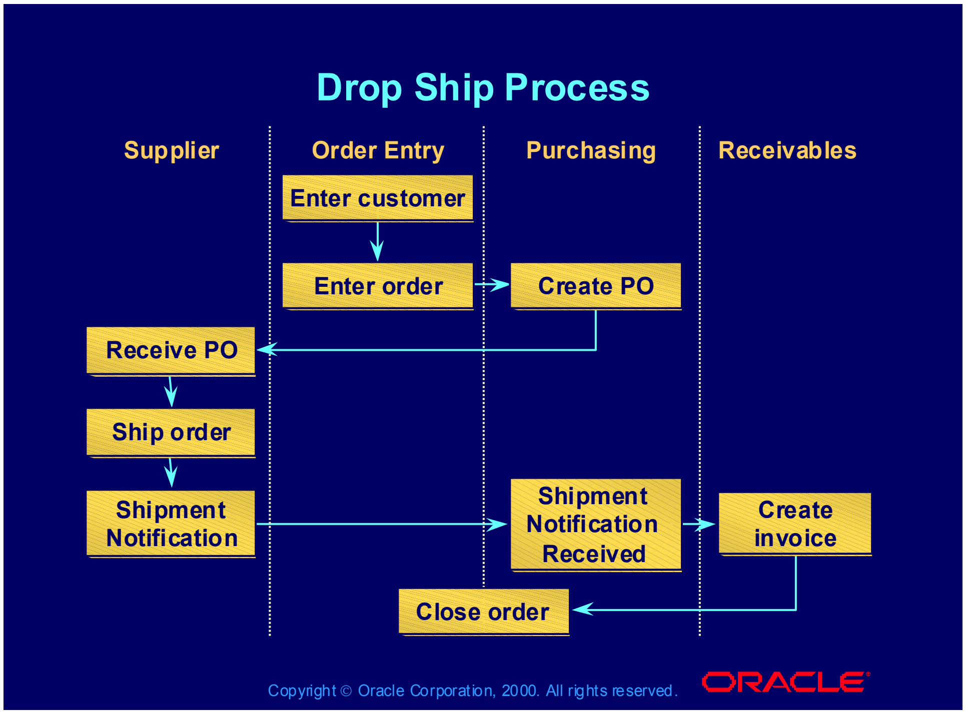
Drop Ship Process



Processing Orders

The following departments and their functions are involved in the drop ship business process:

Supplier

•Warehouse Item

•Ship order

•Shipment notification

Order Entry

•Enter customer

•Enter order

•Demand order (optional)

•Cancel order (optional)

•Close order

Purchasing

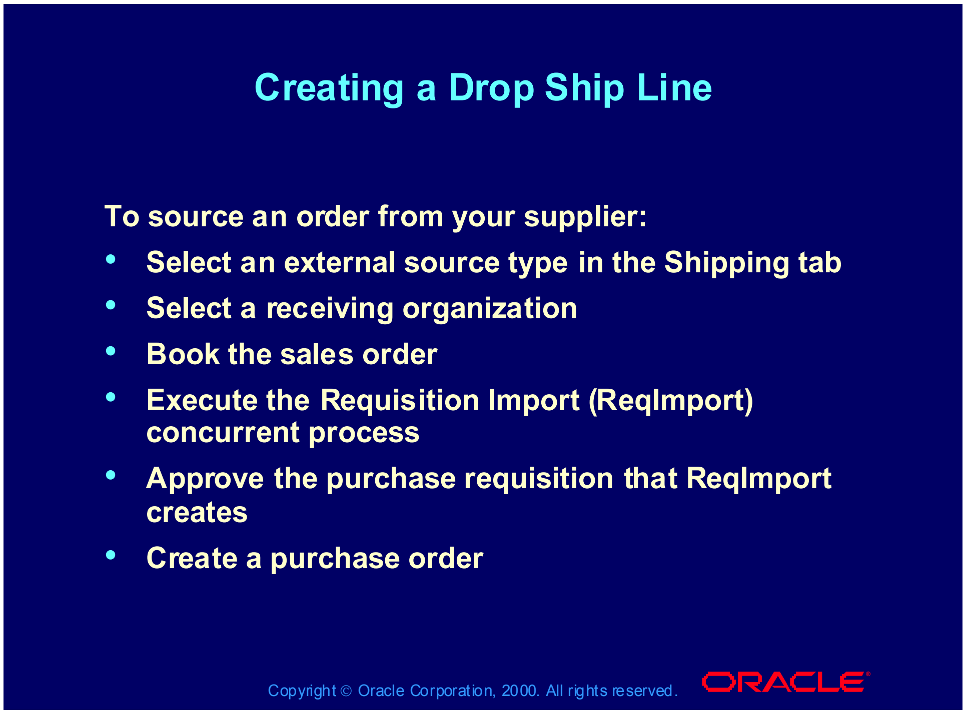
•Create and send Purchase Order

•Enter shipment notification in system

Receivables

•Create invoice

Creating a Drop Ship Line



The Source Type

The Source Type for items on a drop ship order is External. This is because the items will ship from an external supplier.

There are two types of Source Types for the items on a drop ship and combination standard order. The Source Type for the drop ship items is External. The Source Type for the standard items is Internal as the items will come from the internal warehouse.

Receiving Organization Versus Warehouse

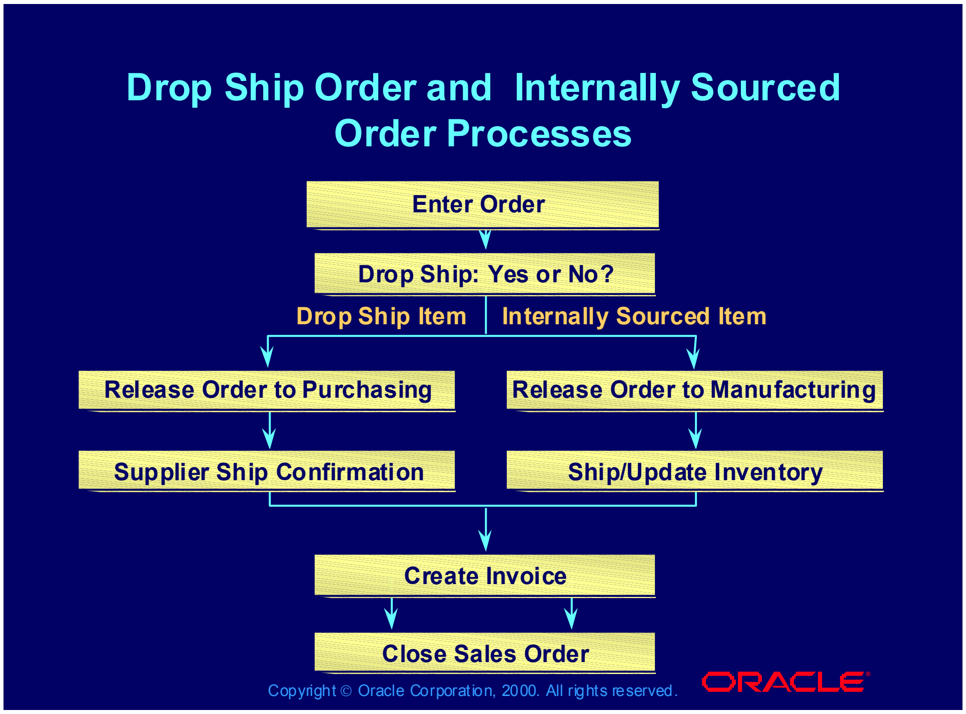
Drop ship items require entry of a Receiving Organization instead of a Warehouse. This Receiving Organization acts as a temporary warehouse for the drop ship items, even though the items are never stored there.

Viewing Drop Ship Information

Viewing Drop Ship Information

1. In the Sales Orders window, Line tab, click Action and select Additional Line Information.
2. The Additional Line Information window displays.
3. Select the Drop Ship tab.

Drop Ship Order and Internally Sourced Order Processes



Drop Ship Order Processing Flows

Review the steps involved in the two types of order process flows.

Drop Ship

Customer requests order

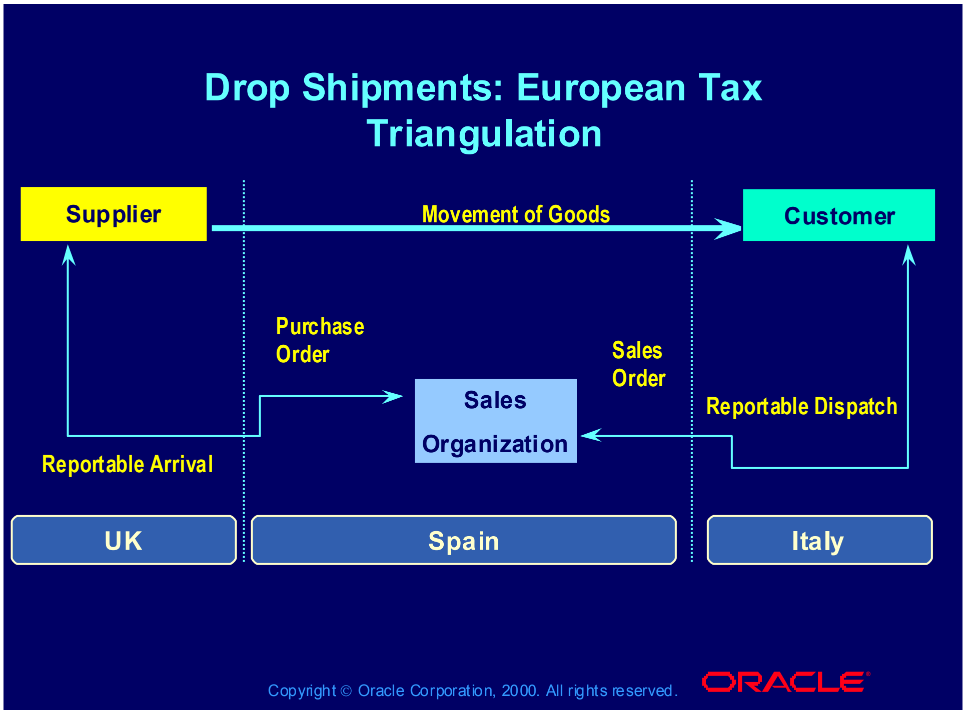
Enter order

Release order lines to Purchasing which send purchase order to supplier

Receive notification of shipment

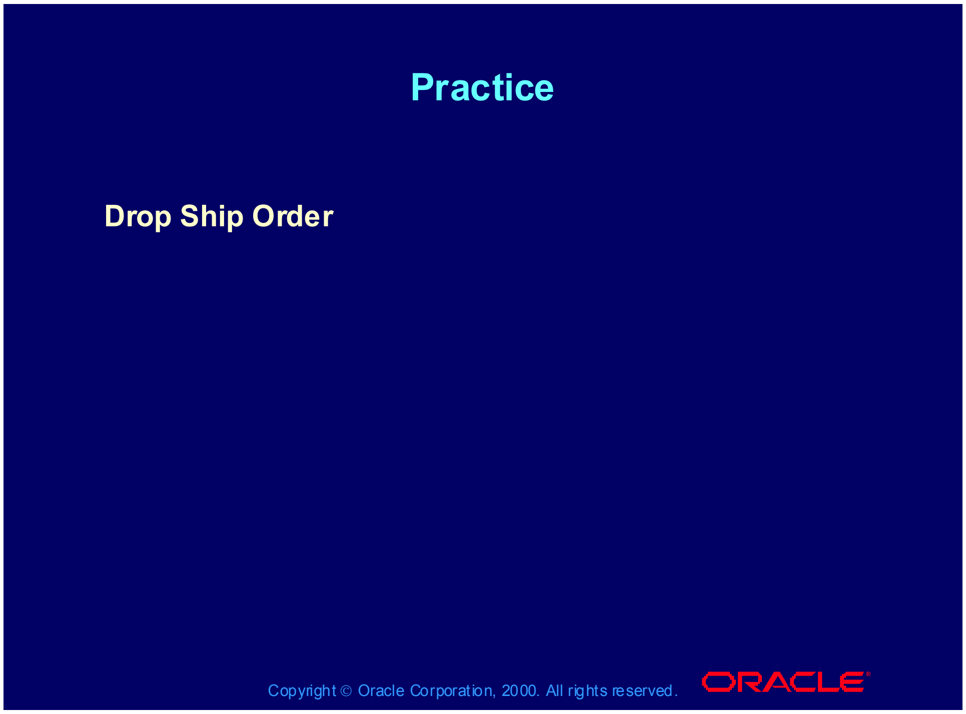
Invoice the customer

Drop Shipments: European Tax Triangulation



Drop Shipments: European Tax Triangulation

Practice



N) Orders, Returns -Sales Orders - (T) Order Information - Main.

Customer: XX-Big City Electronics Wholesale

Select New York as the ship-to and bill-to if they do not default

Order Type: Mixed

Price List: Corporate

Sales Person: Smith Jones

Currency: USD.

Select Order Information (T) Others

Payment Terms: N30.

Tax Handling: Standard

Warehouse: M1

Select Line Items (T) Main

Item: AS54888

Quantity: 2

UOM: EA

Select Shipping

Source Type: External

Receiving Org: M1

Click Book and note your order number

(M) Tools - Workflow Monitor

Verify that the order lines are purchase released:

In the Workflow Monitor window, select the order line from the list on the left

Click View Diagram

Switch responsibility to Purchasing, Vision Operations

Reports - Single Request - Enter Req% in the report name, so you can view the different reports related to requisition import. Then select Requisition Import.

Report Parameters -

Import Source: ORDER ENTRY, leave the defaults (ensure Initiate Approval after requisition import is set to yes).

Click [B] OK

Click [B] Submit and note your request number.

Click [B] No when Submit another request? Appears

Verify your request has completed and a requisition was generated.

Select (M) View - Requests

Click [B] Specific Request

Request ID: Enter your request number

Click [B] Find

Click [B] Refresh Data about every 10 seconds until Phase Completed Status Normal.

You can query the requisition in the requisition summary in Oracle Purchasing by your item number. Alternatively you can check the requisition number on the sales order line in OM.

In the Order Management Responsibility,

Orders, Returns - Order Organizer

In the Find window, enter the order number, then click Find

Click Open Orders

Select Line Items

Click Actions and select Additional Line Information

Select Drop Ship and view the requisition information

Record your requisition number here: _________________

To complete the order process the following steps need to be taken:

Purchasing, Vision Operations, USA.

(N) Autocreate.

Clear (B). Key in requisition number from above.

Control click to select the line

Click Automatic (B) and then OK

Note PO number and again click OK

Wait -- PO will open

Select supplier from LOV - Advanced Network and Santa Clara site

Shipments and verify ship to is for your customer

Receiving controls and change receipt routing to Direct (from LOV). Click OK

Click Approve (B)

(N) Receiving-Receipts

Choose M1 organization

Key in PO number

Your purchase order should open up the receipt header screen showing your supplier

Click in bottom half of screen to access the PO lines

Check line and save

You may have to supply M1 as the location and DROP SHIP as the subinventory

Save

Switch back to Order Management and view drop ship/shipment information

In the Order Management Responsibility

(N) Orders, Returns - Order Organizer

In the Find window, enter the order number, then click Find

Click Open Orders

Select Line Items

Click Actions and Select Additional Line Information

Select Drop Ship and view the information

Review Question

The Sales Order/Purchasing Order Discrepancy Report shows changes made to:

1. Quantity
2. Order Type
3. Schedule Dates
4. 1 and 2
5. 1 and 3

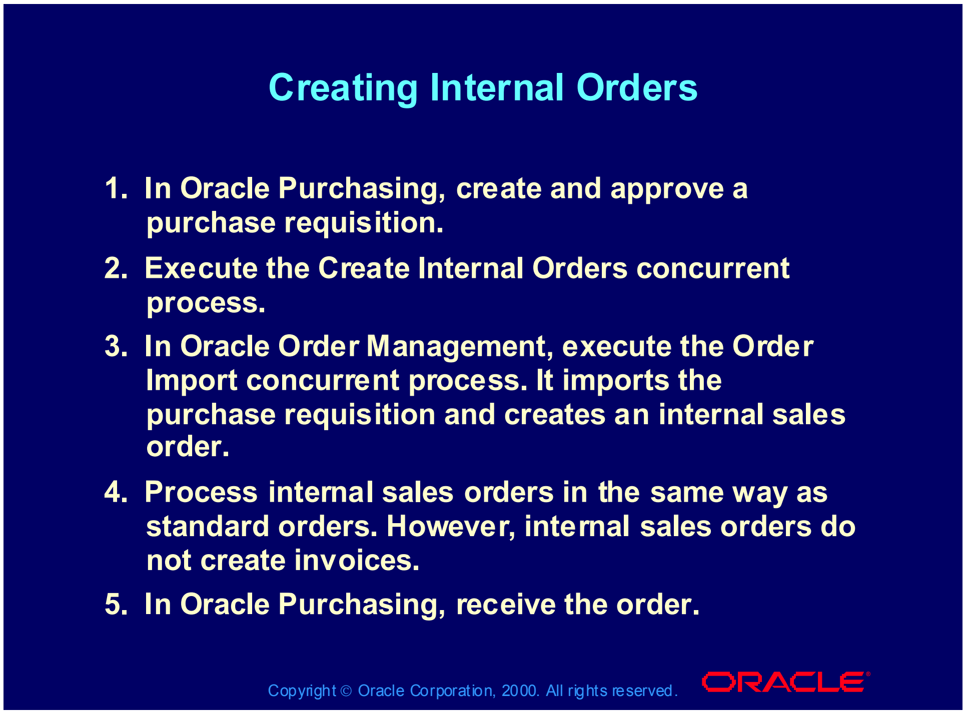
Review Question

Review Question

The Sales Order/Purchasing Order Discrepancy Report shows changes made to:

1. Quantity
2. Order Type
3. Schedule Dates
4. 1 and 2
5. 1 and 3

Creating Internal Orders



Requisition Order Flow

Requisitions are created in Oracle Purchasing (Create Internal Sales Orders) and then imported into Oracle Order Management (OrderImport) as an Internal Sales Order. The Create Internal Sales Orders and OrderImport processes can be set to run automatically at specified intervals.

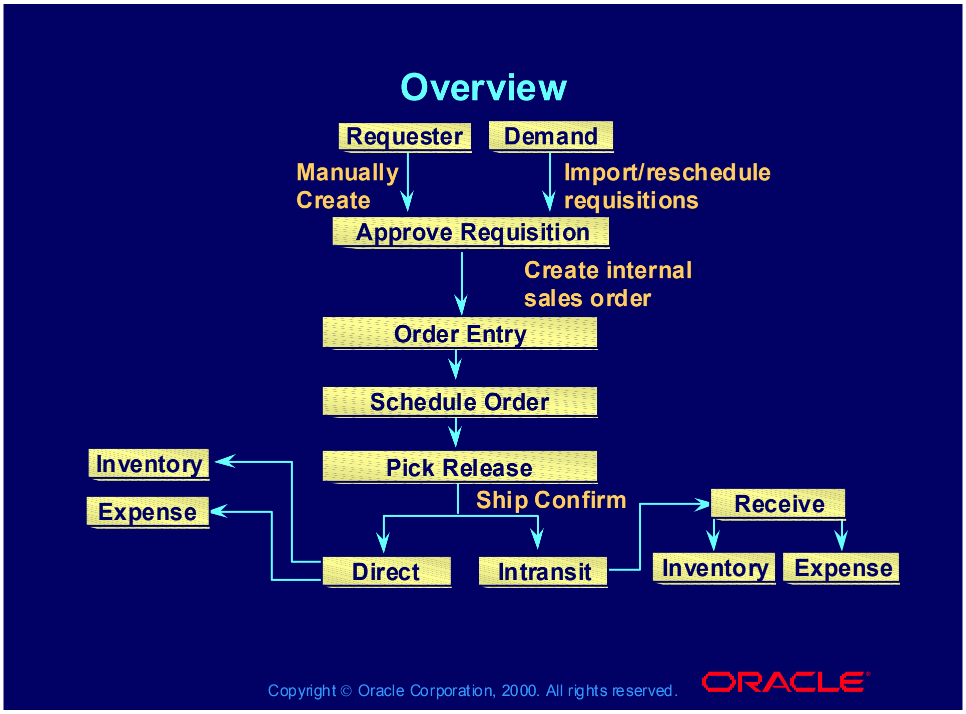
Purchasing uses location associations to create internal sales orders from internal requisitions for a given deliver-to location. The associated customer site becomes the Ship-To site for Oracle Shippings's ship confirmation.

This process also provides a link between the requirement of an end user and the physical demand against Inventory. Inventory automatically generates requisitions to maintain stock level of an item. The requisitions may request stock from an internal predefined source organization or from an outside supplier.

Internal Requisitions use the Account Generator, which automatically builds account distributions. You can specify only one accounting distribution per inventory sourced line.

This internal requisition process provides the features needed to define your inter-organization shipping network. For transfers between two organizations, you can specify whether to use in transit or direct shipments. You can also require internal requisitions for transfers between specific organization

Overview



Automatic Intercompany Invoicing Features

Intercompany COGS and Revenue

Define different accounts for Trade and Intercompany COGS and Sales Revenue to eliminate intercompany profits.

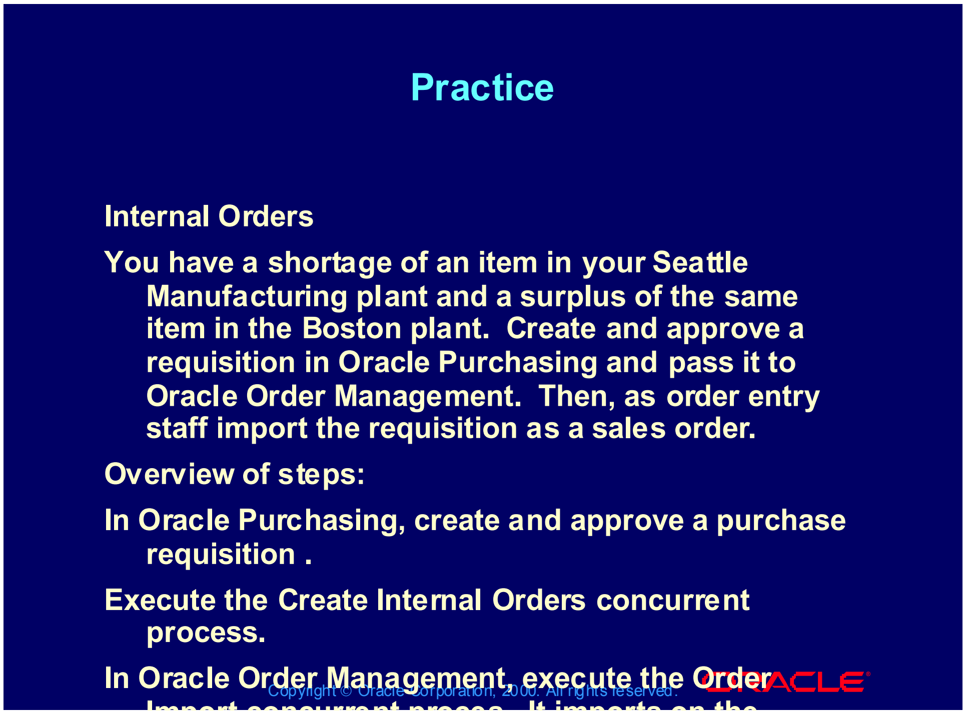
Transfer Pricing

Establish your transfer pricing in intercompany invoices through a price list.

Automatic Intercompany Sales Recognition

Assign a shipping warehouse under a different operating unit to a sales order. Oracle Applications automatically records an intercompany sale between the shipping organization and the selling organization by generating intercompany invoices. The process starts after the product is shipped.

Practice



In the Purchasing Responsibility,

Requisition-Requisition

Requisition Header

Type: Internal Requisition

In Requisition Lines

Type: Goods

Item: CM13139

UOM: Each

Qty: 3

Need By: Today’s date + 7

In Requisition Footer

Destination Type: Inventory

Organization: Seattle Manufacturing

Subinventory: FGI

Source: Inventory

Org: Boston

Subinventory: FGI

Save your work and record the requisition number.

Click Approval.
In the Approve Document window, click OK.
Navigate Reports - Single Request
Execute Create Internal Orders and record the Request ID.
Verify that the request completes successfully.

In the Order Management responsibility,
(N) Orders, Returns- Order Import

In the Parameters window, enter:
Order Source: Internal
Validate Only: No
Execute the process and record the Request ID.

Verify that the request completes successfully.
Note the number of the internal sales order.

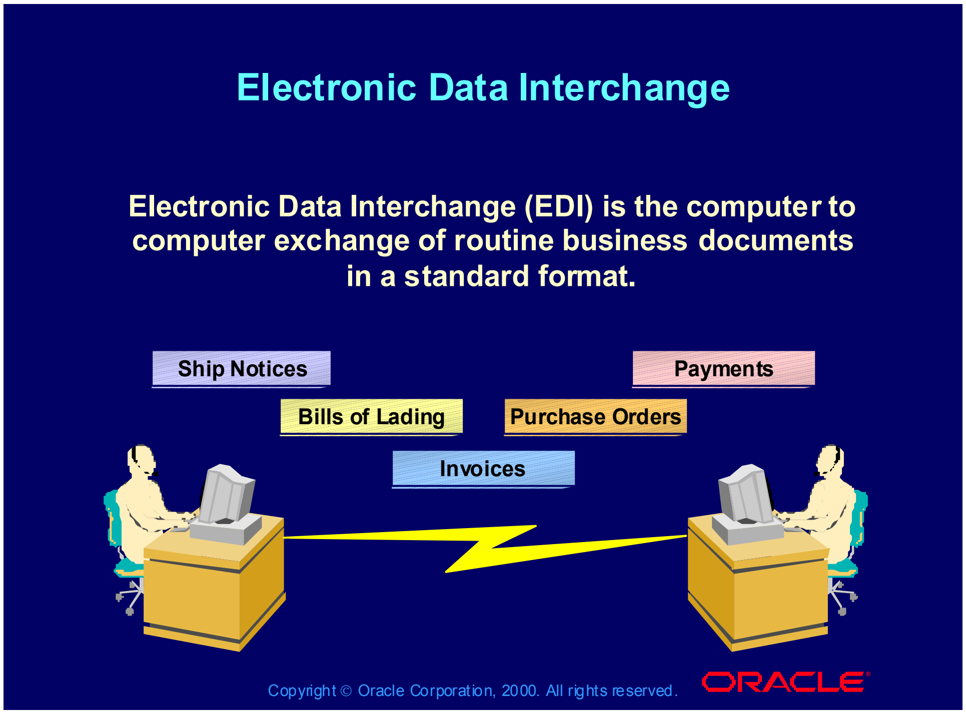
Navigate Orders, Returns > Sales Orders
Query your order
Book your order

Agenda

Agenda

- Overview
- Entering orders: Header information
- Entering orders: Line information
- Scheduling and shipping orders
- Copying orders
- Importing orders and quotes
- Processing drop ship orders, internal orders, and quotes
- Conclusion

Electronic Data Interchange



Order Management/EDI Business Benefits

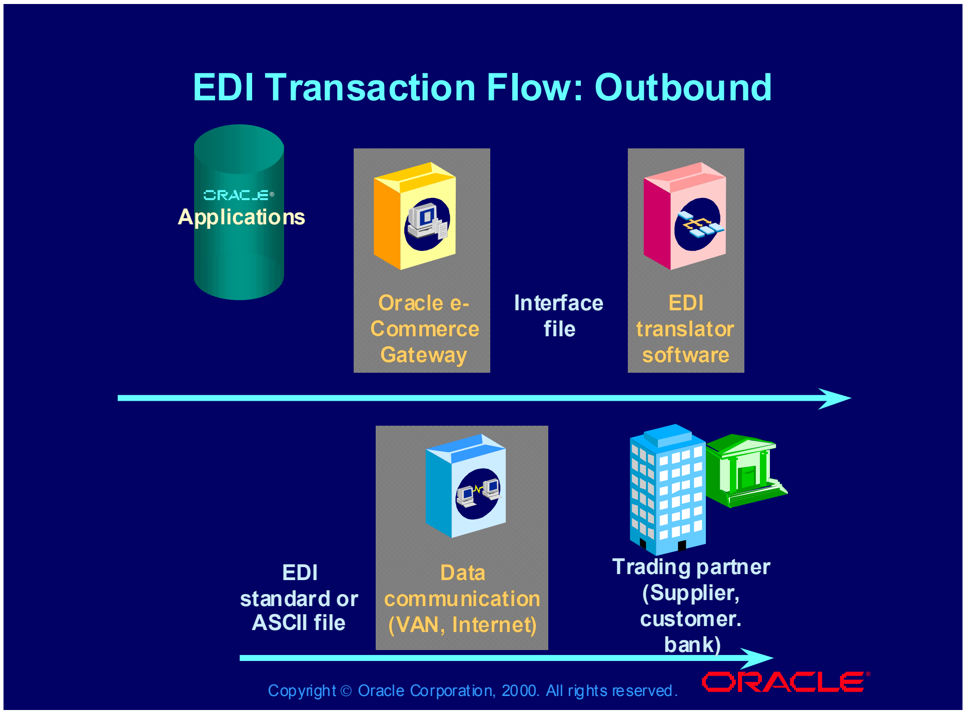
Order Management/EDI Business Benefits

- Provides for order import to save duplicate order entry time.
- Uses single, consistent in/out interfaces between Oracle Applications and trading partner applications.
- Uses transaction interface files that are independent of EDI standards.
- Provides user-definable rules to pre-validate data before passing transactions to Oracle Order Management open interface tables.

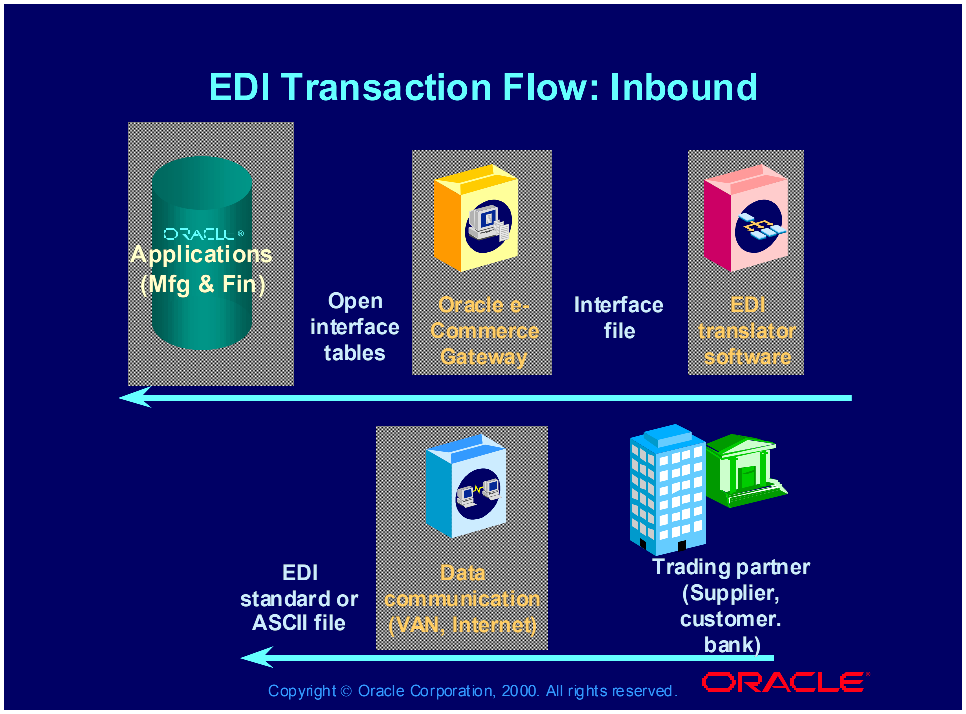
Order Management/EDI Functions

- **Oracle e-Commerce Gateway:**
  - **Passes customer sales orders and change orders with any entry status to Oracle Order Management.**
  - **Sends order acknowledgments to customers.**
- **Find Order Management/EDI setup information in the Setup and Integration Issues for Order Management module.**

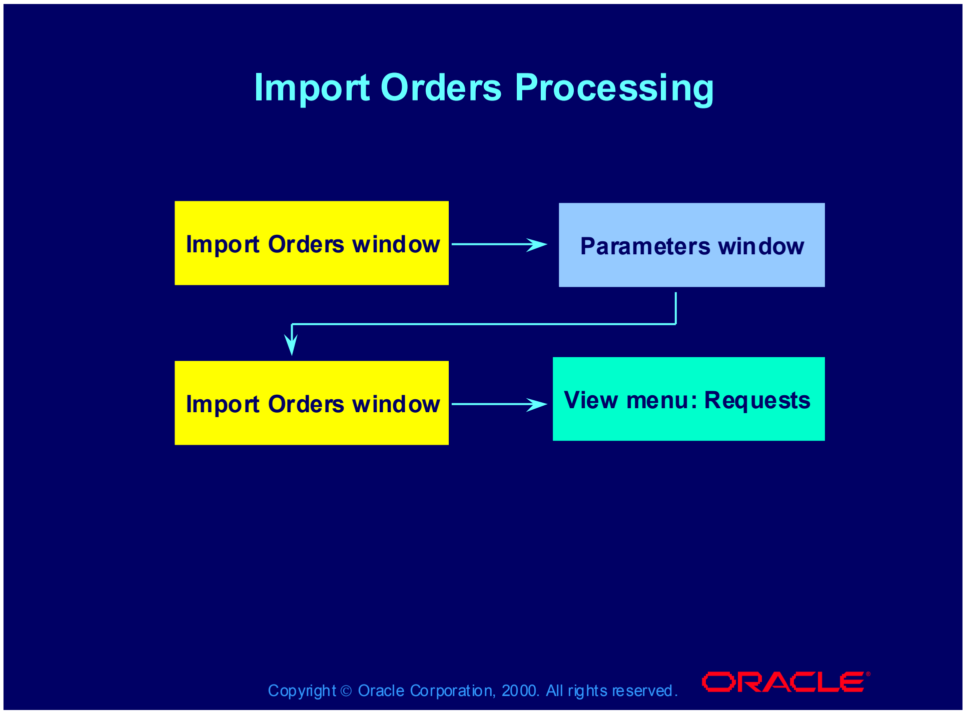
EDI Transaction Flow: Outbound



EDI Transaction Flow: Inbound



Import Orders Processing



(N) Orders, Returns > Import Orders

(Help) (N) Oracle Order Management > Processes > Order Import

Set up Order Import

Set up Order Import

Use the Import Sources window to enter and enable the import sources you wish to use, for example, EDI, Oracle Services, Oracle Sales.

(N) Setup > Orders > Import Sources

(Help) (N) Oracle Order Management > Processes > Order Import

EDI Error Viewing and Correction

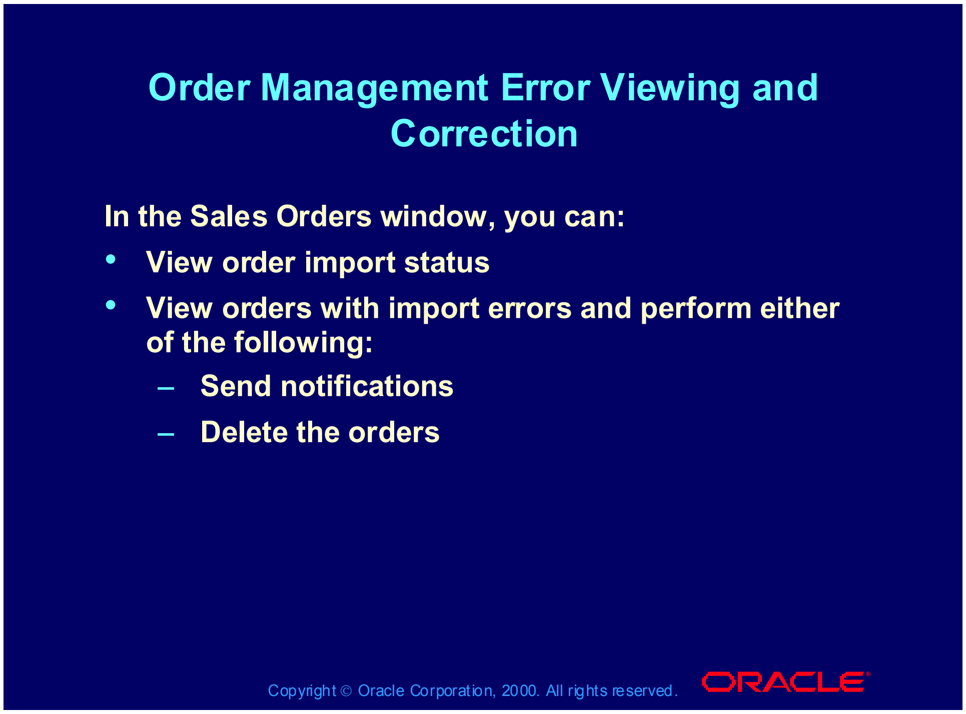
EDI Error Viewing and Correction

- Oracle e-Commerce Gateway allows you to define validation criteria that identifies errors before they pass to Order Import.
- Use the View Staged Documents form to view online exception information for transactions with data violations. You can:
  - Correct the information in your database
  - Mark the transaction to ignore the violation and submit to Order Import
  - Delete the transaction and have your trading partner resend the transaction

(N) (Oracle e-Commerce Gateway) Process > View Staged Documents

(Help) (N) Oracle e-Commerce Gatewsy > Inbound Exception Processing > View Staged Documents Processes

Order Management Error Viewing and Correction



(N) Orders, Returns > Order Import > Corrections > Find Orders

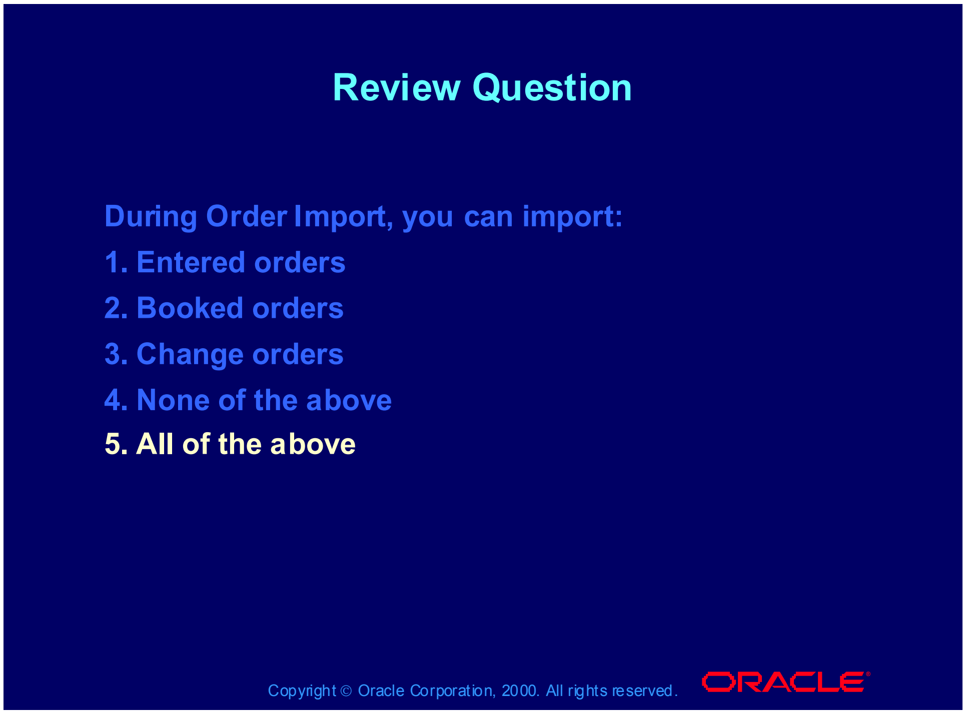
(Help) (N) Oracle Order Management > Processes > Order Import

Review Question

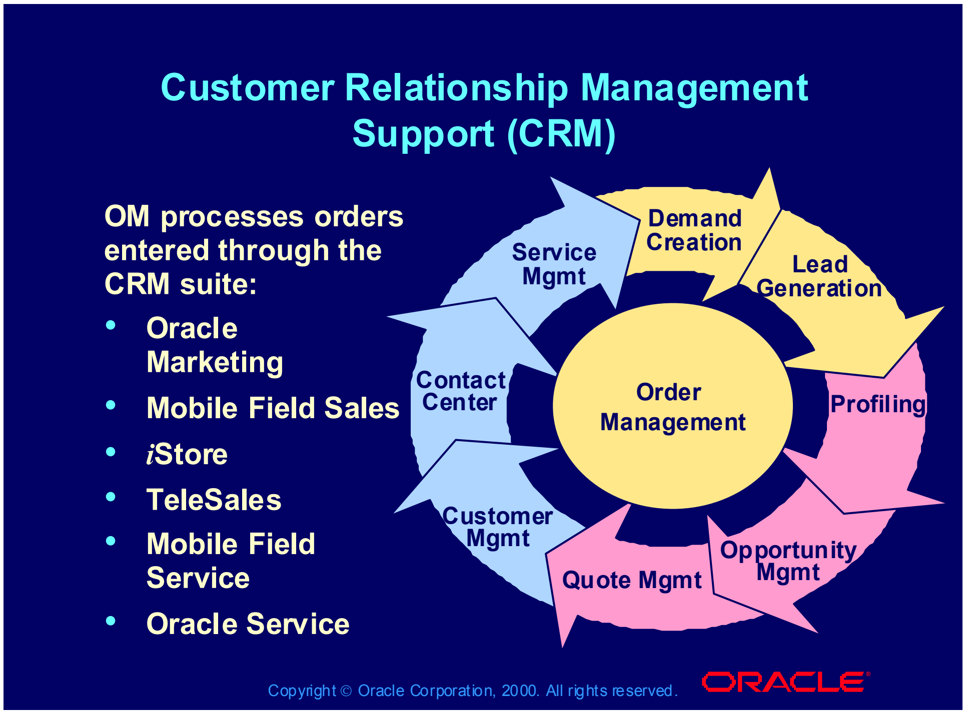
During Order Import, you can import:

1. Entered orders
2. Booked orders
3. Change orders
4. None of the above
5. All of the above

Review Question



Customer Relationship Management Support (CRM)



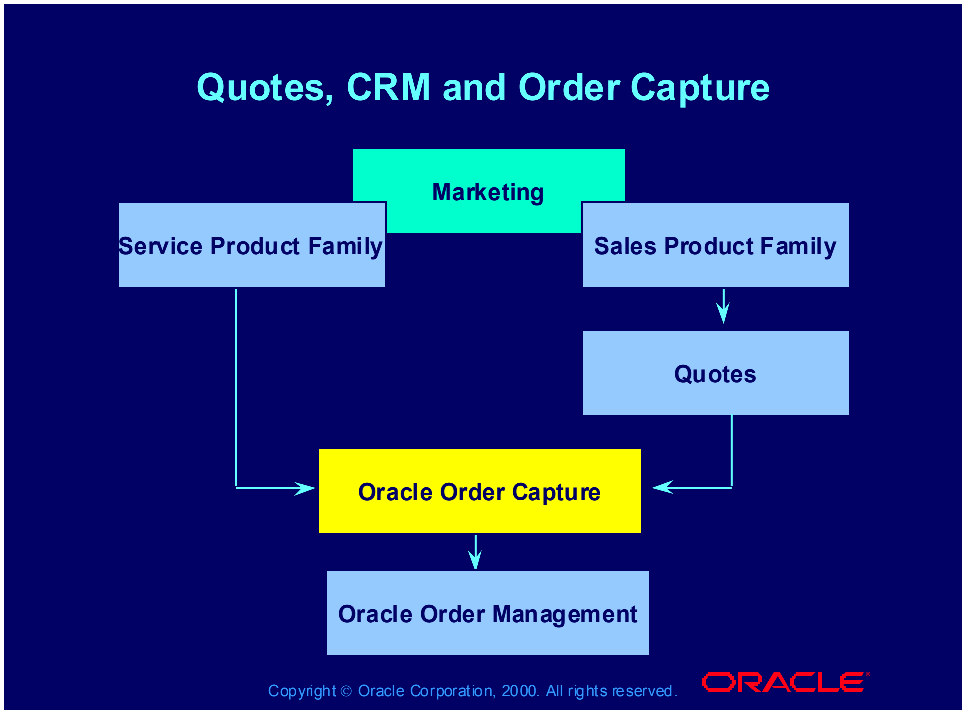
Oracle Apllications provides the capability to intergrateback office modules (ERP) with front office modules (CRM)

OrderManagement is specifically tied to Quote Management, Service Orders, and Mobile Service charges via Order Capture.

Information from sales order Sales credit are integrated to Sales and Marketing modules.

Information from sales orders also integrate to the Service product suite for instillation details and service program information into the Service InstallBase.

Quotes, CRM and Order Capture



Order Capture Functionality

- Supports front office multi-channel quoting capabilities
- Full integration with Order management product suite
- Real-time pricing, payment authorizations, reservations, available-to-promise (ATP) and payment method

Quotes to Oracle Order Management

Quotes to Oracle Order Management

- Oracle Order Capture is a:
  - Solution for entering and updating customer quotes and orders in the front office environment
  - Single point of integration into the ERP applications to pass quotes as orders to Order Management
- To send a quote in Oracle Order Capture as an order to Oracle Order Management, click Book Order.

Agenda

Agenda

- Overview
- Entering orders: Header information
- Entering orders: Line information
- Scheduling and shipping orders
- Copying orders
- Importing orders
- Processing drop ship orders, internal orders, and quotes
- **Conclusion**

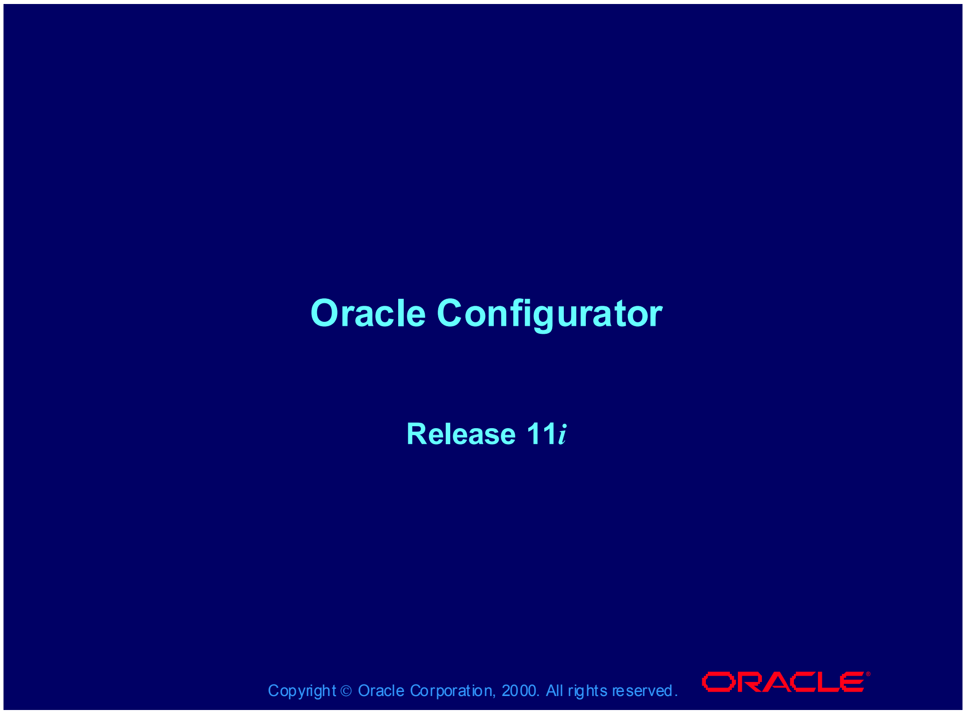
ORACLE

Summary

In this lesson, you have learned how to:
- Enter sales order header information
- Enter sales order line information
- Schedule and book a sales order
- Copy an order
- Describe order import
- Enter drop ship and internal orders

Oracle Configurator

Chapter 4



Required Prerequisites for this Module

- None

Recommended Prerequisites for this Module

- Overview to the Order Management Process
- Enter/Import Orders

Other Modules and Courses of Related Interest

- Inventory (course)
- Bills of Material (course)
- Implementing Oracle Configurator (course)
- *i*Store (course)

Objectives

After completing this module, you should be able to do the following:

- Describe what makes an item configurable
- Describe Oracle Configurator
- Distinguish the different configuration environments
- Configure a line item in Order Management using Oracle Configurator
- Edit an existing configuration

Agenda

Agenda
Overview of configuring items
Overview of Oracle Configurator
Environments used for configuring items
Configuring an item in Order Management
Summary and additional information
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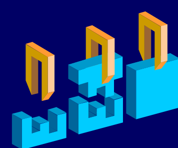
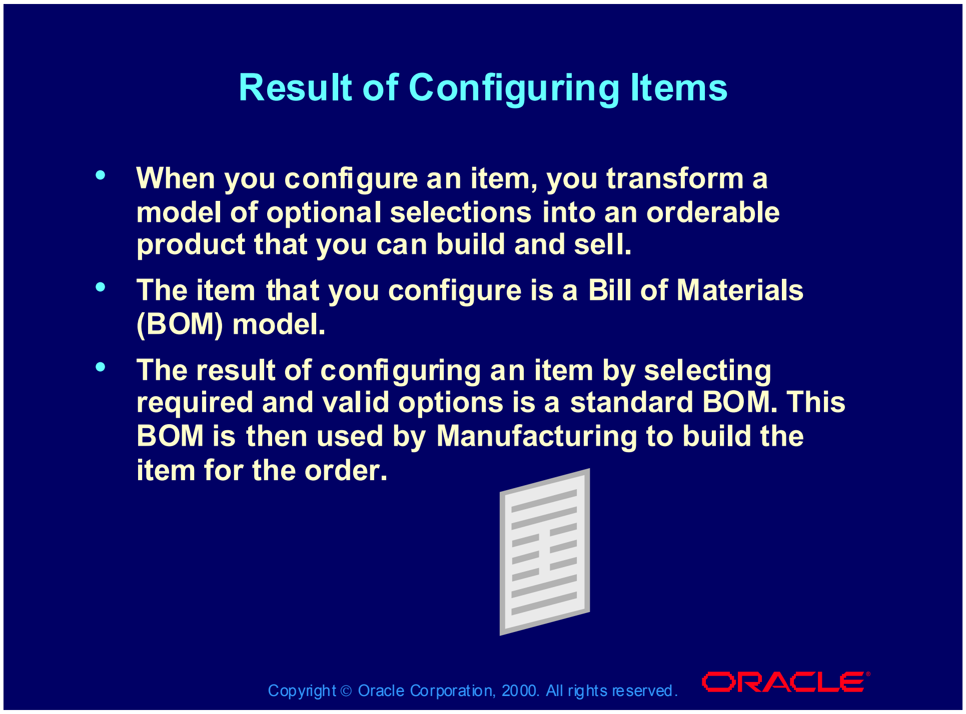
ORACLE

Overview of Configuring Items

- **Why configure items?**
  - **To order complex custom items, error free**
  - **Maintain consistency between ordered item configurations and downstream manufacturing processes**



Result of Configuring Items

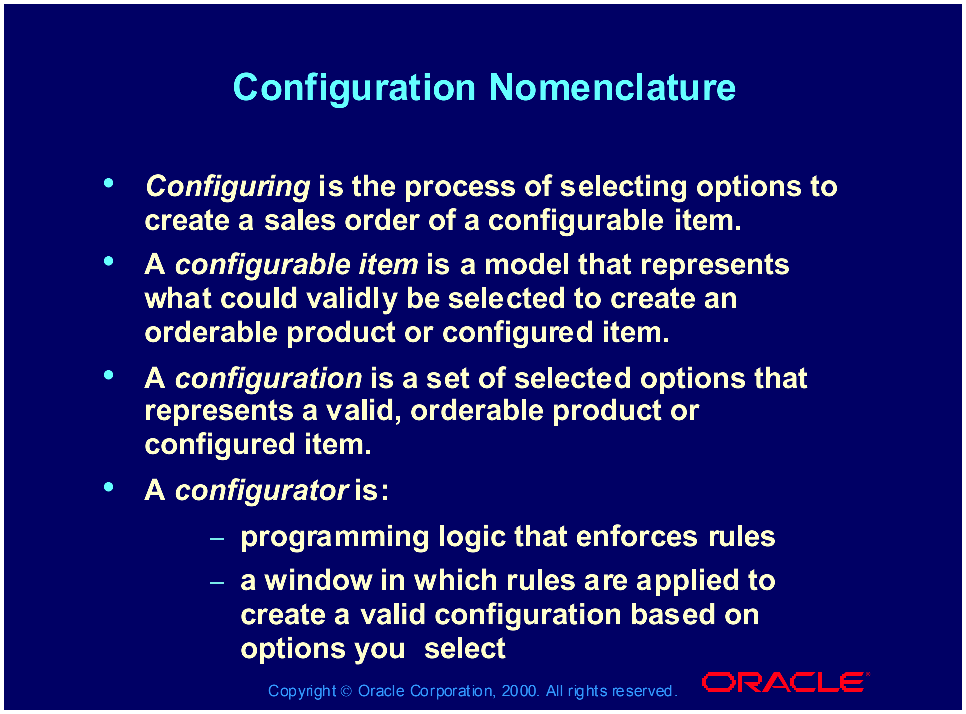


Note

In OM you order and build configurations of a model, you do not order or build the model itself. The model can be a PTO (pick to order) or ATO (assemble to order) BOM model, or a configuration model based on an ATO/PTO BOM model.

In Oracle Configurator Developer, you build the configuration model, which can include guided buying/selling questions in addition to the ATO/PTO BOM model.

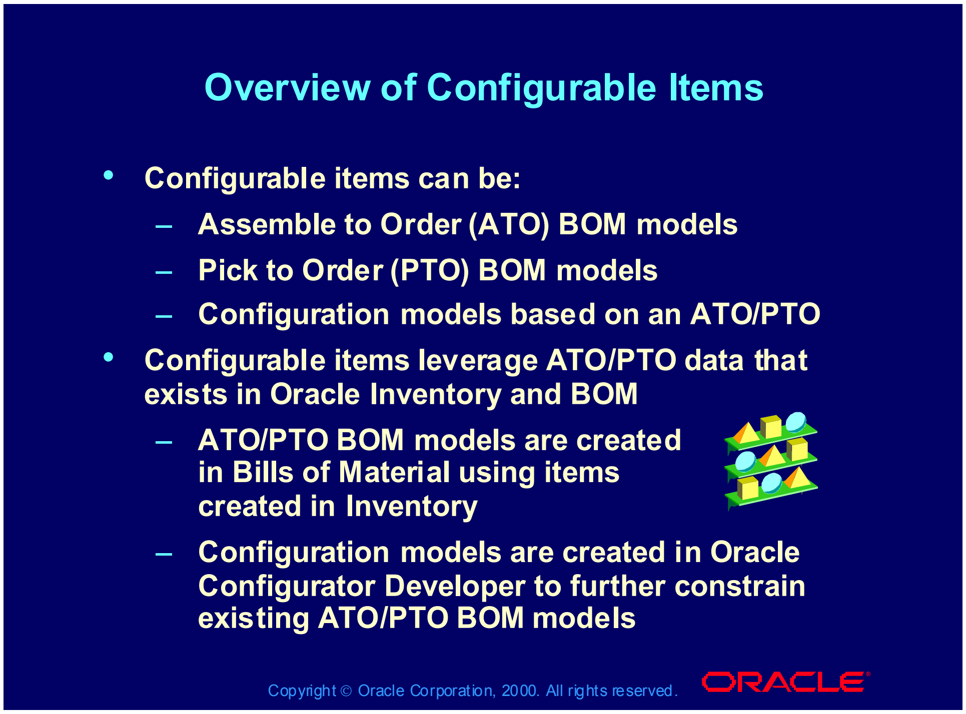
Configuration Nomenclature



Details

Configurations are stored and can be restored for additional editing prior to an order being booked.

Overview of Configurable Items



Details

ATO BOM models represent product models that require assembly in Work in Process (WIP) and a downstream manufacturing process.

PTO BOM models represent product models that require only a pick list.

PTO BOM models that are configurable may consist of ATO BOM models.

Configuration models are compiled structure, rules, and UI definitions stored in the Oracle Configurator schema (CZ) in Oracle Applications. The configuration is orderable because it is a BOM based on an existing BOM model that is available in Oracle Bills of Material and is comprised of Oracle Inventory items.

BOM Model Hierarchy

- ATO/PTO BOM Model
  - Option Class (required and mutually exclusive)
    select one and only one Item (required)
  - Option Class (required)
    select one or more optional items (required)
  - Option Class (optional and mutually exclusive)
    if you select one item, select only one item
  - Option Class (optional)
    select none, some, or all optional items

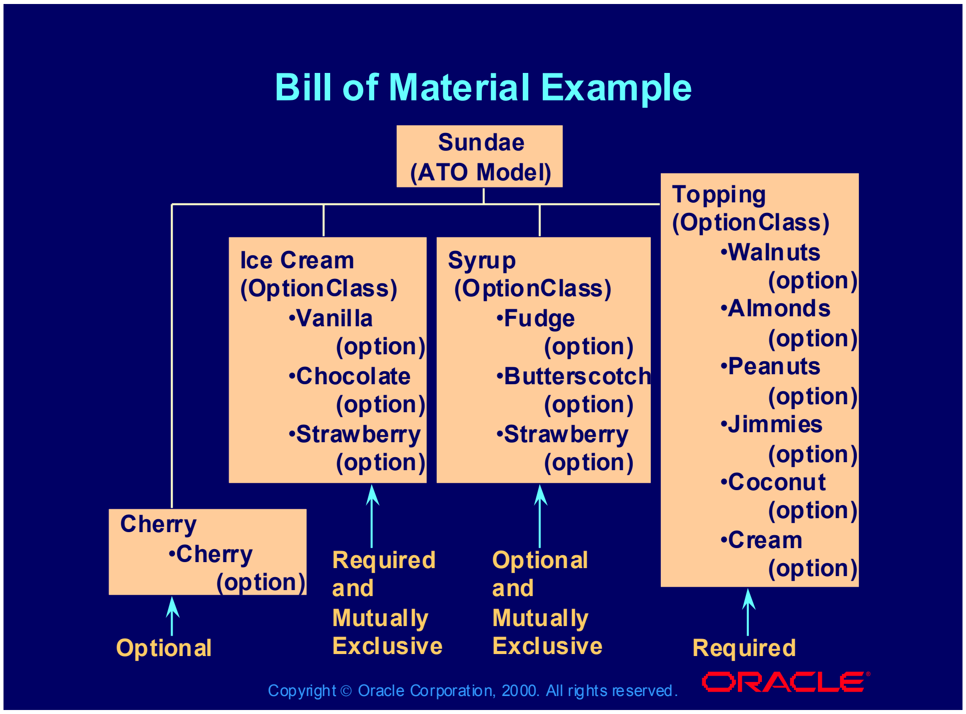
Details

In Oracle Applications Bills of Material, you define the hierarchical relationship of items to create a BOM model. A BOM model consists of components, including other BOMs. All components in a BOM are also items defined in Oracle Inventory.

You specify whether an item is required or optional when creating the BOM.

ATO and PTO BOM models list the available items in a BOM but enforce only minimum/maximum quantities and optional or mutually exclusive rules when adding items to the sales order.

A configuration model is constructed using an existing ATO/PTO BOM model, but it can enforce many complex, user-defined rules that ensure customers order only valid product configurations. Configuration models are created in Oracle Configurator Developer.



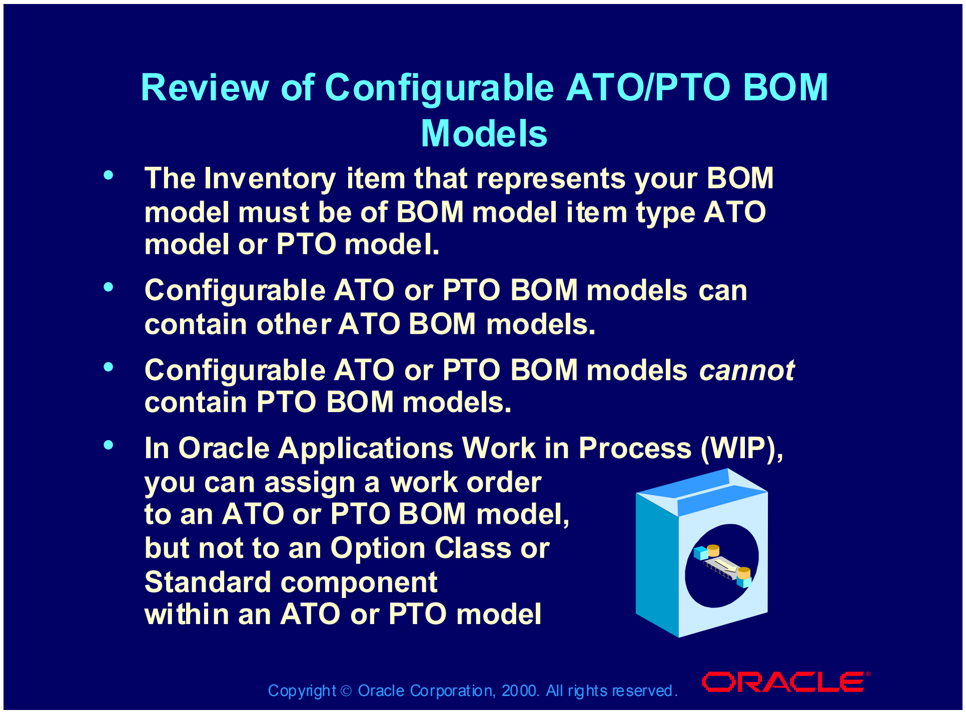
Details

An ice cream sundae model requires ice cream, but you can only pick one flavor per sundae. You do not have to select a syrup, but if you do, you can only pick one kind of syrup per sundae. You must pick a topping, but you can pick one, some, or all. You can have a cherry, if you want, but the sundae configuration will be complete without a cherry.

Additionally, the BOM model can define minimum and maximum quantities on the options.

With Oracle Configurator, you can additionally define rules that further constrain valid sundaes. For instance, you can limit the model to some maximum number of toppings that is less than all the available toppings. Or you can define a rule that excludes Fudge syrup from a choice of Chocolate ice cream.

Review of Configurable ATO/PTO BOM Models



Details

Not all BOM models are configurable. A BOM model that is configurable is an item defined in Oracle Inventory with the following attributes:

- User Item Type: ATO Model, PTO Model, or Model
- Item Type: ATO Model or PTO Model
- BOM Allowed: Yes
- BOM Item Type: Model, Option Class, or Standard

The items that are components in an ATO/PTO model may have any User Item Type and Item Type, but must have a BOM Item Type of Option Class or Standard.

Any item that is a BOM component that contains child components must have the BOM Allowed attribute set to Yes. If a Standard item has the BOM Allowed attribute set to Yes, then it can be a Kit containing other Standard items. Standard items within a Kit are required (mandatory) and the BOM Allowed option must be set to No for the items in the kit.

Agenda

- Overview of configuring items
- **Overview of Oracle Configurator**
- Environments used for configuring items
- Configuring an item in Order Management
- Summary and additional information

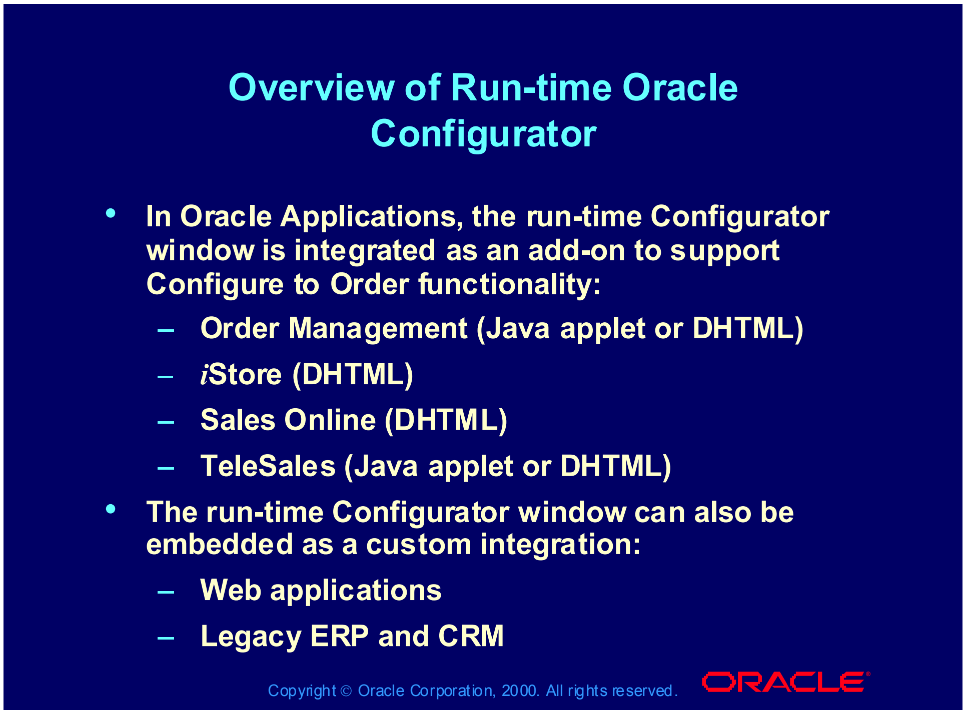
Overview of the Oracle Configurator

- A run-time Configurator window is integrated (embedded) in Oracle Applications or in a custom web deployment.
- There are multiple UI styles available for the run-time Configurator window:
  - Java applet
  - DHTML window in a browser
  - custom
- Oracle Configurator's development environment, Oracle Configurator Developer, is a Microsoft Windows only application for creating configuration models that end users access in the run-time Configurator window

Details

The Options window in Order Management is NOT a configurator, even though it is accessible from the Configurator button in the Order Management Sales Order Pad. See the Enter/Import Orders module of your Order Management course for information about the Options window.

Overview of Run-time Oracle Configurator



Details

Oracle Configurator is required for configure to order (CTO) processes. Simple option selection is available in Order Management using the Options window when Oracle Configurator is not installed.

Configurator works in Sales Online through *i*Store.

DHTML is available in Telesales, *i*Store, Order Management, Sales Online.

Java applet is available in Order Managment, Telesales.

Order Capture supports both the Java applet and DHTML Configurator windows.

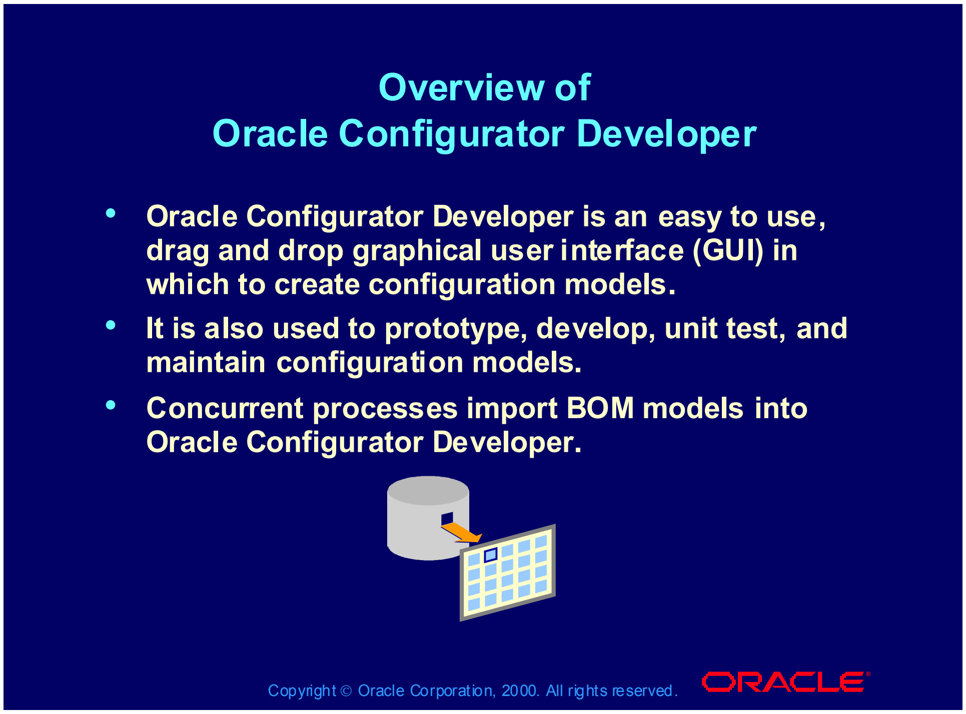
In Order Management, you can configure any ATO or PTO BOM models whether a configuration model has been created for it in Oracle Configurator Developer or not. If not, the Java applet is available for option selection.

If a configuration model does exist, the run-time Configurator window is either a Java applet or a DHTML window, depending on whether the last defined UI Style in is Model Tree or Component Tree, respectively. You specify the UI style in Oracle Configurator Developer.

A configuration model for which no DHTML UI is defined will not be accessible from *i*Store or Sales Online.

In Order Management, configure to order functionality is only available if Configurator is installed and the profile option OM:Use Configurator = Yes. For simple option selection, the profile option OM:Use Configurator = No. This profile option can be set at the user and site levels. The default setting is Yes.

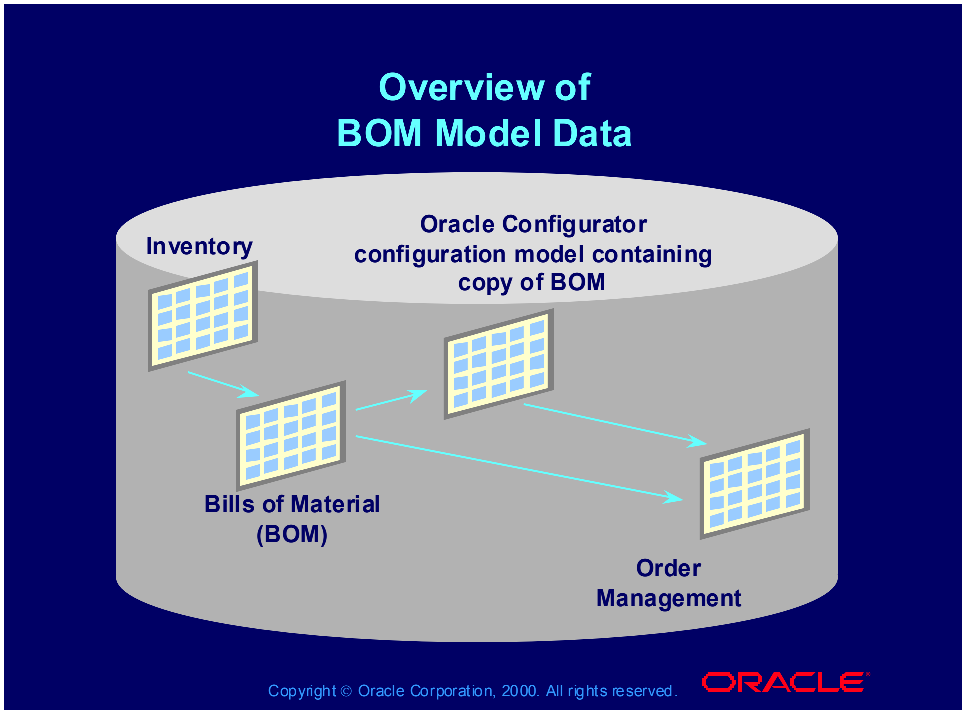
Overview of Oracle Configurator Developer



Additional Information

A particular configuration of the ATO/PTO model results from making selections of BOM model components that are optional in the BOM. The rule attributes on those components (such as mutually exclusive or minimum/maximum) are enforced by Oracle Configurator and result in a valid BOM.

If the ATO/PTO BOM has been imported into the Oracle Configurator schema (CZ) and further constrained with rules defined in Oracle Configurator Developer, it is considered a configuration model. In Oracle Configurator Developer, the imported BOM is read-only structure and is exploded to show all optional components. Required components are not shown because they are included in the BOM regardless of any changes made in Oracle Configurator, and do not influence the possible valid configurations that can be created for that BOM model.



Oracle Configurator Integration with Oracle Order Management

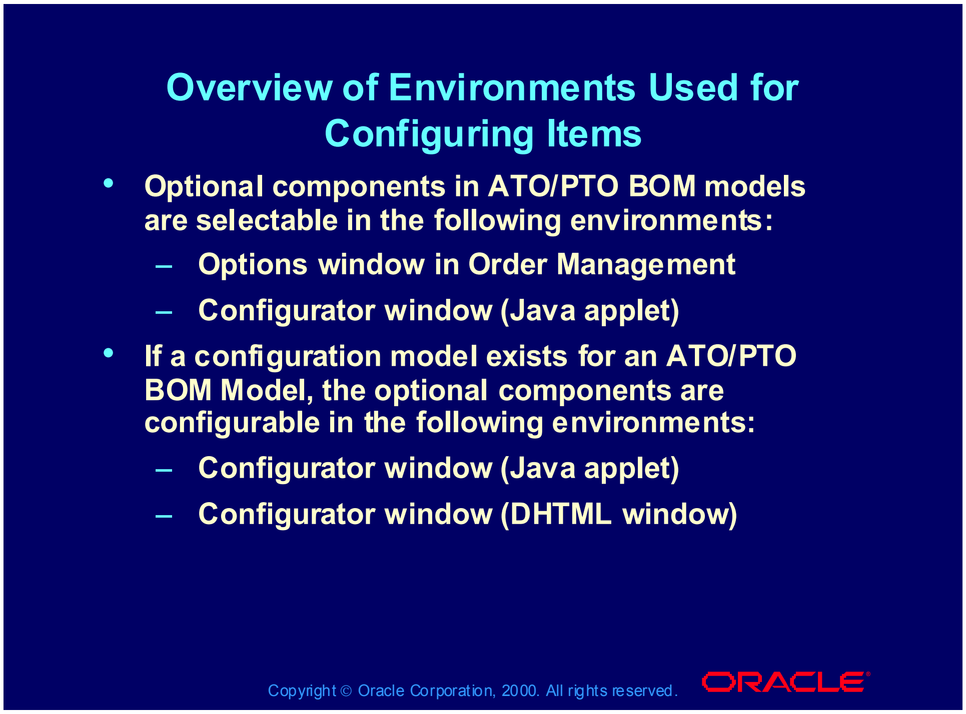
Following are the steps to create a configuration Model in Configurator Developer:

- Create bills of material in Oracle BOM using items defined in Oracle Inventory.
- Transfer BOM data directly from the Oracle Bills of Material database schema to the Oracle Configurator schema (CZ) using concurrent programs. This adds all of the associated items from the Oracle Applications Item Master to the Configurator Item Master table CZ_ITEM_MASTERS.
- The import programs generate a default model structure tree that mirrors the Oracle BOM. (Note: This part of the model structure cannot be changed, although it can be extended.)
- Configuration rules inherent in the BOM structure are automatically applied to the model. Oracle Configurator Developer users create additional rules and generate a user interface, which is driven by the model structure.

- An Oracle Configurator Developer user compiles the model structure, rules, and user interface into a configuration Model.
- OM users access the configuration Model when configuring items in the Sales Orders window.

Agenda

- Overview of configuring items
- Overview of Oracle Configurator
- **Environments used for configuring items**
- Configuring an item in Order Management
- Summary and additional information



Additional Information

For access to any Configurator window:

- Oracle Configurator must be fully installed
- Profile Option OM:Use Configurator set to Yes.

The configuration model definitions and rules determine the look and feel of the Configurator window. The Configurator window is merely the run-time representation of the configuration model.

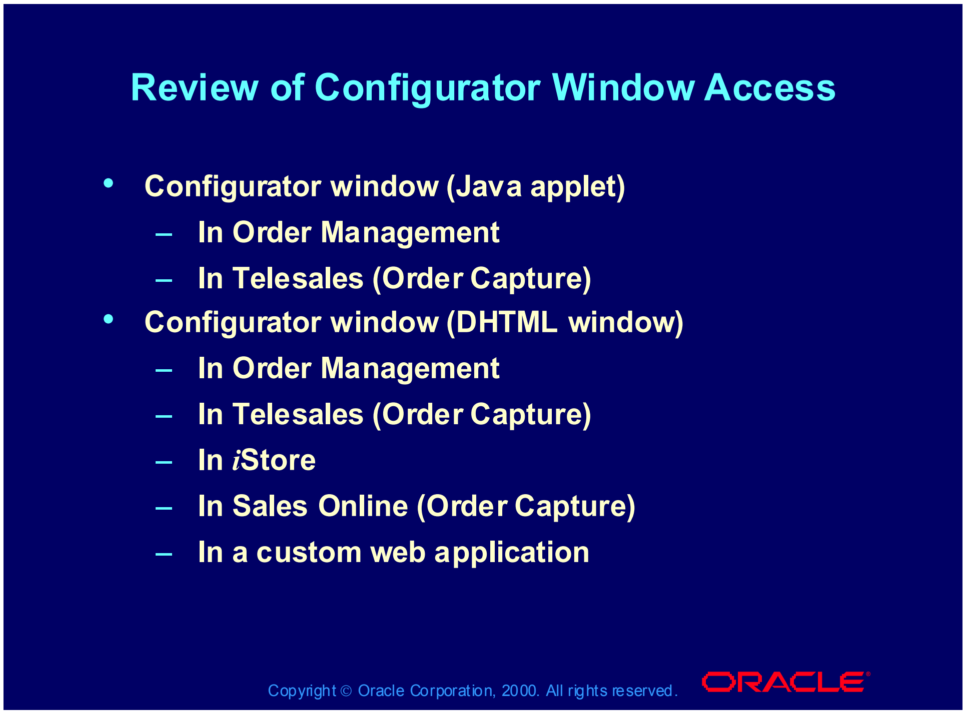
The Java applet is a static, non-customizable user interface for making option selections and viewing summary results. The Java applet is available for selecting options in an ATO/PTO item even if no configuration model has been created.

The DHTML window is a dynamic, customizable user interface that may include guided buying/selling screens. The DHTML window is only available if a configuration model has been created with a DHTML type UI defined.

Any Configurator window enforces rules with real time validation.

For information about how the Options window in Order Management handles validation, see Enter/Import Orders in the Order Management curriculum.

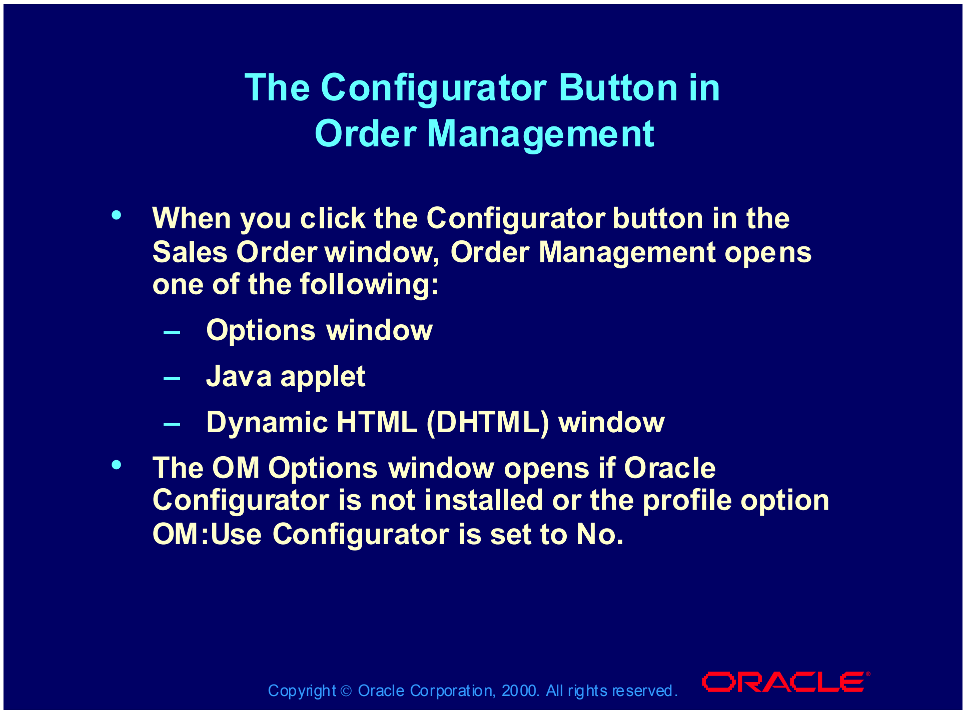
Review of Configurator Window Access



Additional Information

Options Window in Order Management, though accessed from the Configurator button, is an options selection environment only.

The Configurator Button in Order Management



Details

The profile option OM: Use Configurator can be set only at the User and Site level and the default value is Yes. Yes means use the Oracle Configurator to configure items. If the profile option is set to Yes and you have installed Oracle Configurator, clicking on the Configurator button opens a Java applet or DHTML window. If the profile option is set to Yes and you have not installed Oracle Configurator, clicking on the Configurator button opens the Options window. If the profile option is set to No, clicking on the Configurator button opens the Options window.

The Configurator Window in Order Management

The Configurator Window in Order Management

- A DHTML window or Java applet opens if Oracle Configurator is installed and the profile option OM:Use Configurator is set to Yes.
- Oracle Configurator supports two UI types:
  - Java applet for basic ATO/PTO option selection
  - DHTML for custom look and feel, including guided buying/selling
- The UI that appears depends on which type was last generated or modified for the model in Configurator Developer

Additional Information

The hosting application (for example, OM, iStore, TeleSales, and so on) determines which UI style to use based on the information in the Configurator's UI definitions. If multiple UIs are available for the selected item, the hosting application displays the most current UI (based on the latest modification date).

The DHTML window UI can be customized in Configurator Developer. The Java applet cannot be customized.

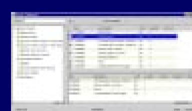
Guided buying/selling provides a means of driving valid configurations from customer requirements or needs assessment. The user is presented with a variety of questions that automatically select items in the configuration Model.

For example, a customer is ordering a laptop computer. When you click on the Configurator button, questions appear such as "What is your budget for this item?" and "What are the main tasks you will perform using this computer?" Based on the answers to these questions, the system adds items to the order to create a laptop computer that meets the customers needs.

Buying/selling questions are added manually to the imported BOM model structure in Configurator Developer.

Order Management
Configurator Window: Java Applet

- Static look and feel based on ATO/PTO models, option classes, and standard items as defined in Oracle BOM
- Not customizable
- Default UI for Order Management and TeleSales when no configuration model defined for the selected item
- Can be used when guided buying/selling is not required



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Notes

Clicking on the Configurator button opens a Java applet if:

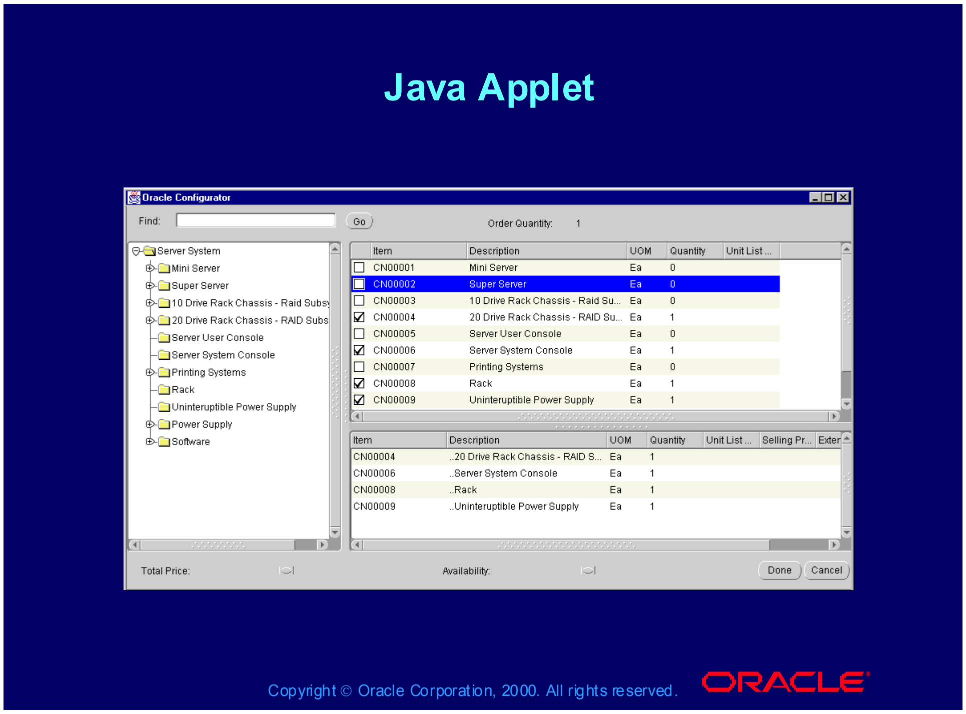
- Configurator is installed, the profile option OM:Use Configurator is set to Yes, and no configuration model has been defined for the specified item.
- Configurator is installed, the profile option OM:Use Configurator is set to Yes, and the last UI defined for the model in Oracle Configurator was a BOM Model Tree UI.

Only BOM nodes are visible when viewing the item in the Java applet.

The Java applet window is used to configure:

- BOM models for which no configuration model was created in Oracle Configurator Developer (that is configured directly)
- configuration models that have no guided buying/selling structure

Java Applet

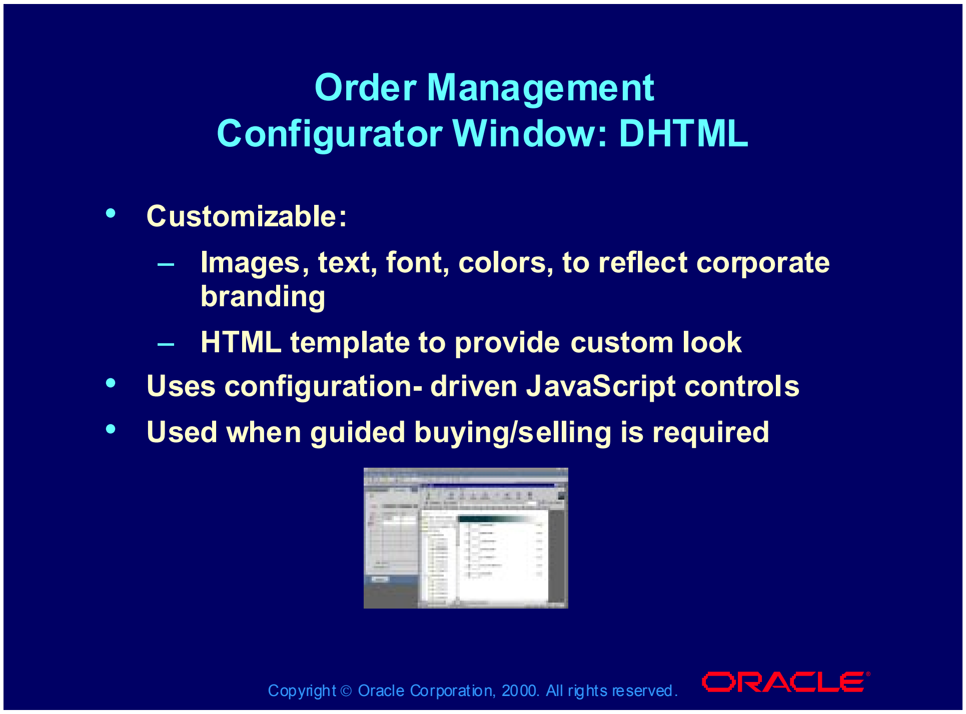


Notes

In the left frame, there is a navigation tree containing option classes and standard items. The upper frame shows optional items, and this is where you make selections to configure the order. The rules defined for the model in Oracle BOM or Configurator Developer are checked each time you make a selection. For example, if an invalid item is selected, an error message appears. The lower frame is a summary of selections.

When you are finished, click the Done button to return to the Order Management Sales Orders window.

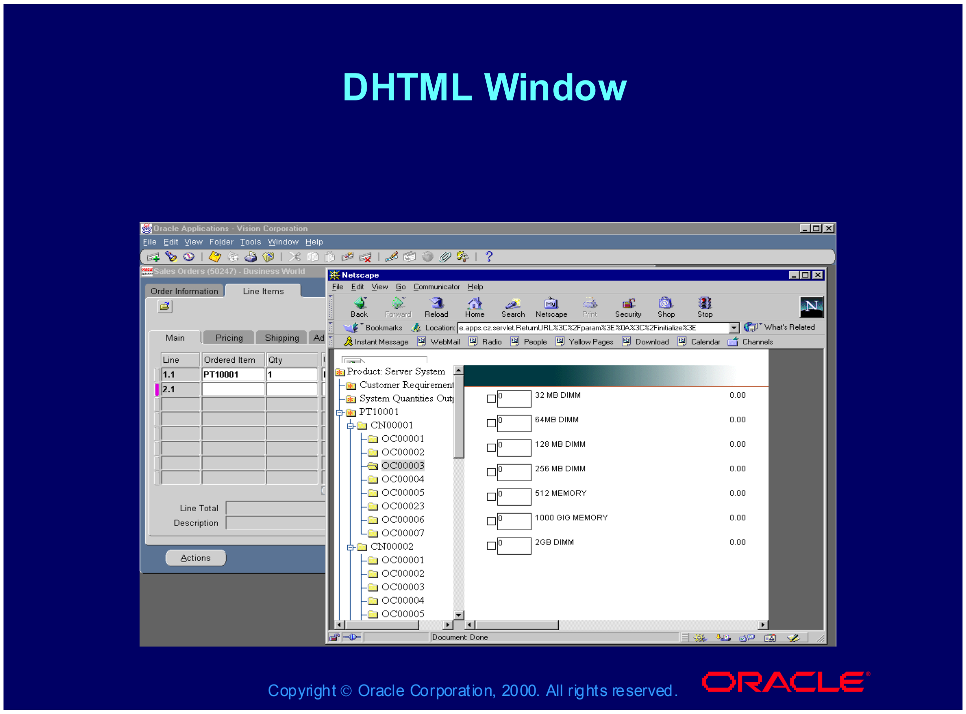
Order Management Configurator Window: DHTML



Notes

- The DHTML window is used for *i*Store, custom Web applications, and configuration models with guided buying/selling in Order Management.
- All components are visible when viewing the item in the DHTML window (unlike the Java applet, which displays only BOM nodes).
- Clicking on the Configurator button opens a DHTML window if all of the following are true:
  - Configurator is installed
  - the profile option OM:Use Configurator is set to Yes
  - the last UI defined for the model in Oracle Configurator was a Component Tree UI
  - or
  - the hosting application (such as a custom Web application) is set up to open a DHTML window

DHTML Window



Note

When the user is in a hosting application such as iStore, the user selects a configurable item (BOM model), then clicks on the Configurator button. This opens the Configurator DHTML window.

Agenda

- Overview of configuring items
- Overview of Oracle Configurator
- Environments used for configuring items
- **Configuring an item in Order Management**
  - Guided Practice Demonstration
  - Practice
- Summary and additional information

Overview of Configurable Items in Order Management

- An item can be configured in Order Management if its bill of materials model has a BOM Item Type of “Model.”
- The BOM model defines the list of options you can choose. The result of your choices is a configuration.
- The BOM model also specifies mandatory components or included items that are required for each configuration.
- Before you can configure an item in Order Management, an ATO or PTO model must exist in Oracle BOM.

Additional Information

Model bills can contain Option Class bills, which can include Standard bills as well as other Option Classes. Standard bills are manufactured products, kits, subassemblies, or purchased assemblies and appear at the bottom level of a bill of materials structure.

For example, the item X1 Desktop Computer is a configurable item because it has a BOM Item Type of Model. CPU is an Option Class within this model, and it includes the items 486 Processor and Pentium Processor. Monitor is also an Option Class within model X1 and it includes the Option Classes VS and VGA. The VS1 and VGA1 monitors are standard bills (items) within the VS and VGA Option Classes.The hierarchy for this item is shown below:

1 - X1 Desktop Computer (Model)

2 - CPU (Option Class)

3- 486 Processor

3 - Pentium Processor

2 - Monitor (Option Class)

3 - VS (Option Class)

4- VS1 Monitor (standard item)

3 - VGA (Option Class)

4- VGA1 Monitor (standard item)

Required Items

Required items do not appear when configuring an item in Order Management. These items are automatically selected when other, optional items are selected when creating the sales order. When you configure an item and click Done, the hosting application (for example, OM) creates a full BOM, exploded to include all items, even though they were not visible in the configurator window.

For example, you are configuring a desktop computer. Several types of monitors are available and they appear as part of the BOM in the configurator window. Each monitor was defined as a standard item in Oracle Inventory with the BOM Allowed attribute set to Yes. This indicates that a monitor is a Kit that may contain other required items. In this example, each monitor inventory item includes a power supply cord as a required item. Therefore, when you are configuring the desktop computer and you select a monitor, the appropriate power supply cord is added to the order automatically since it is a required item for the monitor. However, the power supply cord does not appear as part of the BOM in the configurator window.

Item Validation Organization

In Order Management (OM), the organization with which the ordered item is associated is always the Item Validation Organization. The Item Validation Organization is assigned to the item in Oracle Inventory. If a BOM model imported into CZ is associated with a different organization, it is not accessible from OM.

Overview of Configuring an Item in Order Management

Overview of Configuring an Item in Order Management

- **You can manually configure items by choosing options directly from a model bill in OM.**
- **You access the model bill by entering an item number and then clicking the Configurator button in the Sales Order window.**
- **This opens a new window in which you select options to configure the item.**

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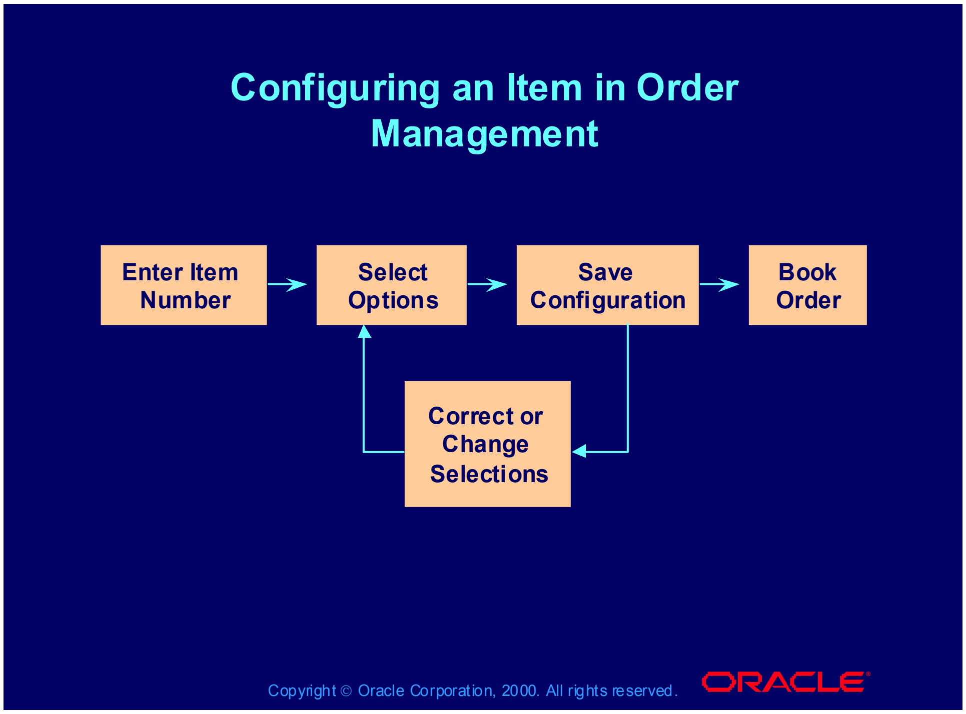
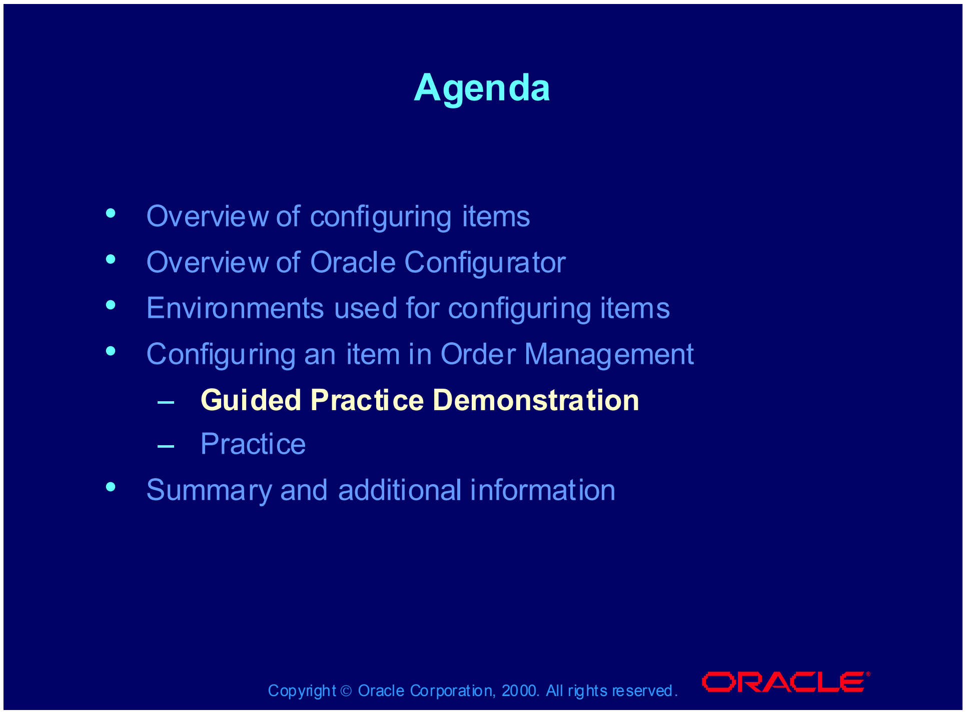
Configuring an Item in Order Management



Additional Information

- You enter the item number in the Sales Order window and click the Configurator button to select options (configure the item).
- After selecting all desired components, click Done to save the configuration. If the configuration requirements are satisfied, the system saves the item and returns you to the Sales Order window. Otherwise, make changes until the configuration requirements are satisfied.
- In the Sales Order window, click Book Order.

Agenda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Guided Practice: Configuring an Item in Order Management

1. Change to Responsibility
Order Management Super User

2. In Order Management, open the Sales Orders window.

(N) Orders, Returns > Sales Orders (T) Order Information (T) Main

3. Enter a Customer Name
or select from list of values.

4. Select an Order Type that supports Manufacturing release line types for model assembly needs.

B = Button
N = Navigator
T = Tab
M = Menu
I = Icon
H = Hyperlink

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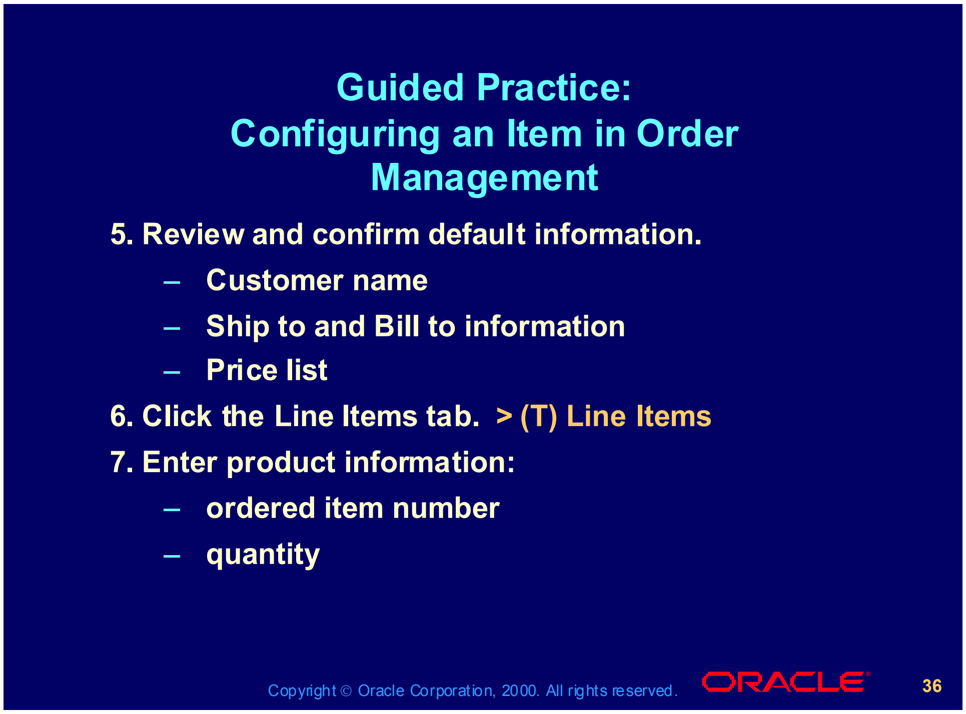
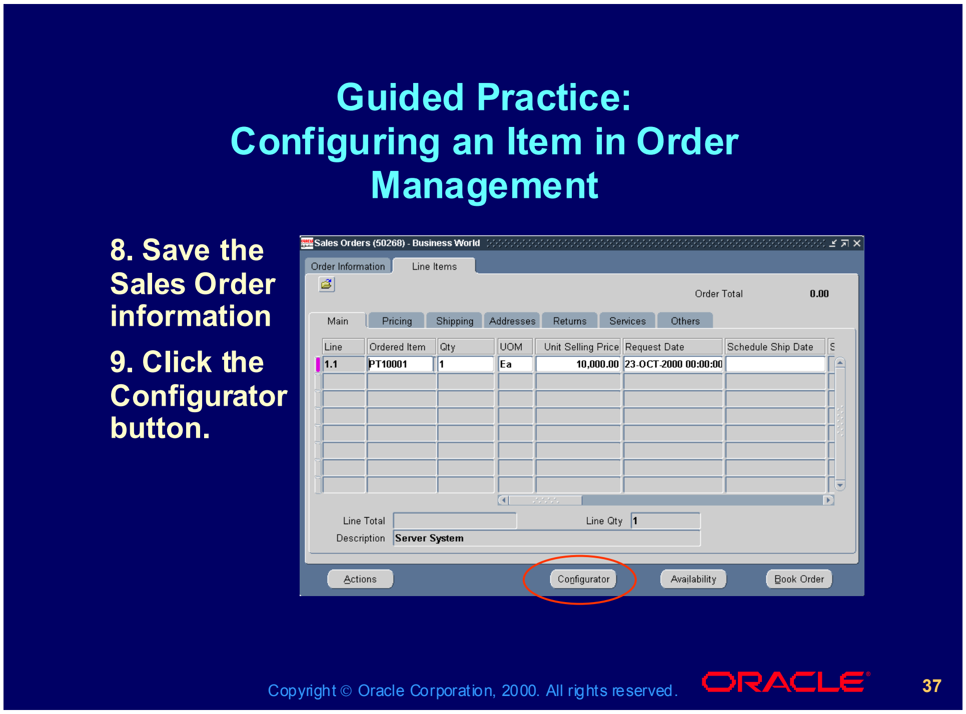
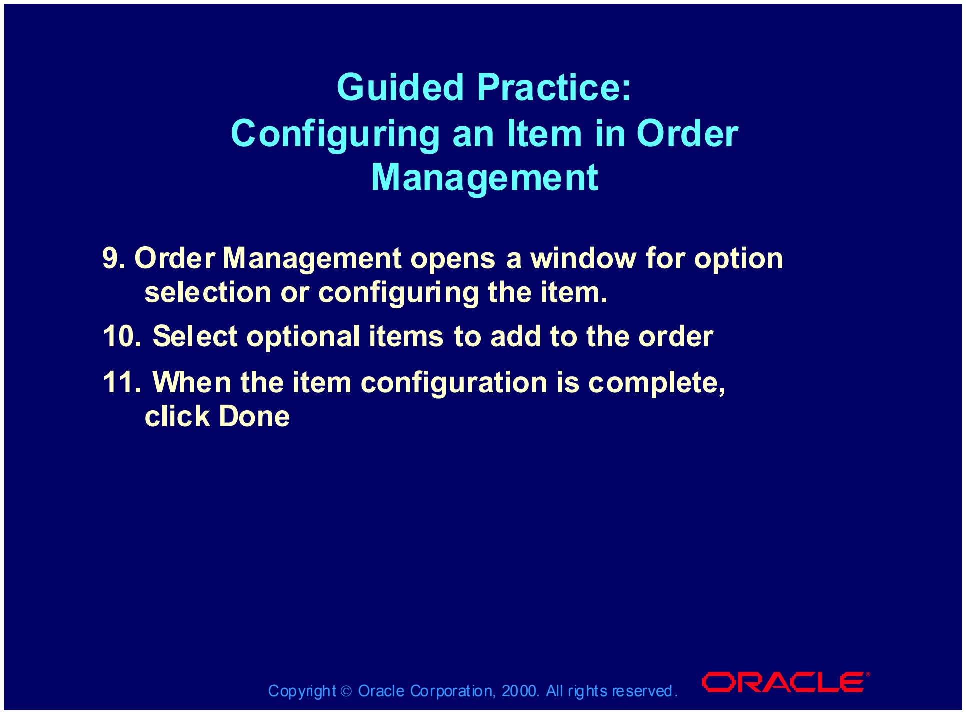
Guided Practice: Configuring an Item in Order Management



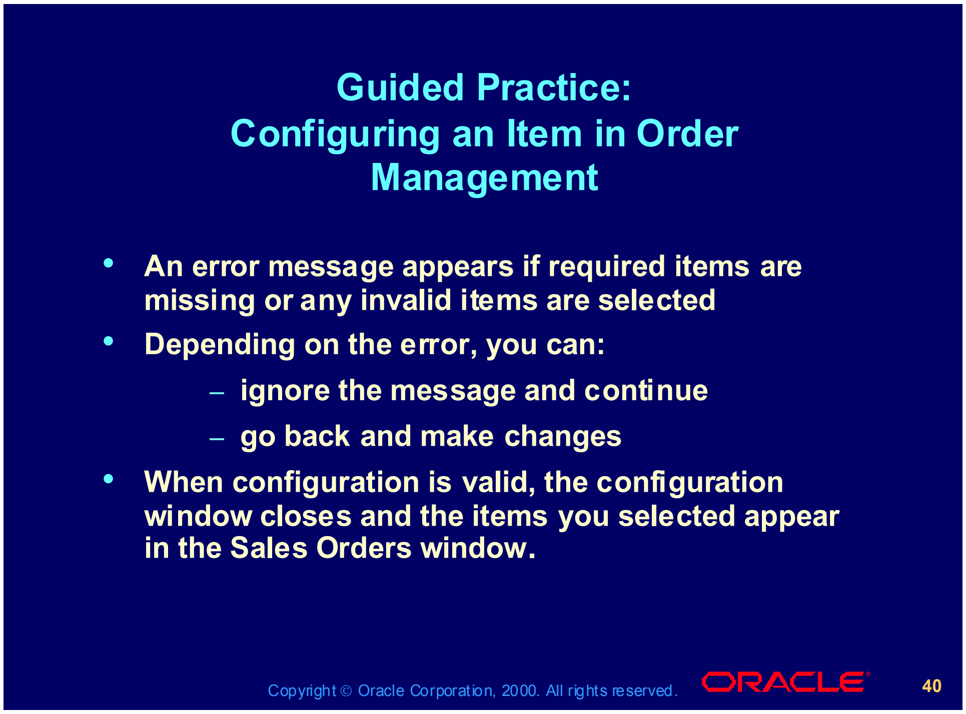
Guided Practice: Configuring an Item in Order Management



Guided Practice: Configuring an Item in Order Management



Guided Practice: Configuring an Item in Order Management



Additional Information

Closing a UI generated as a DHTML window requires a few more mouse clicks than closing the Java applet window.

If the user does not include an option class that is required for the product and clicks the Done button to complete the configuration, Configurator displays a message indicating that additional work is required.

Summary display is a logical place to verify that all the necessary components have been ordered.

Review Question

Review Question

What -- *at a minimum* -- needs to be in place for the embedded Oracle Configurator window to appear when you click the Configure button in Order Management?

1. Profile Option OM:Use Configurator set to Yes
2. Oracle Configurator installed and set up.
3. A configuration model defined.
4. An ATO/PTO BOM model item selected on the order line in the Sales Order pad.

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Answer to Review Question

What -- *at a minimum* -- needs to be in place for the embedded Oracle Configurator window to appear when you click the Configure button in Order Management?

1. Profile Option OM:Use Configurator set to Yes

2. Oracle Configurator installed and set up.

3. A configuration model defined.

4. An ATO/PTO BOM model item selected on the order line in the Sales Order pad.

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Review Question

Which of the following statements are *not* true?

1. Configurations can be restored and edited after the order has been booked.
2. It is possible to complete an order of a configuration that is not valid, meaning it violates the configuration rules defined in the model.
3. Configuration models are created in Oracle Configurator Developer to further constrain existing ATO/PTO BOM models

Answer to Review Question

Answer to Review Question

Which of the following statements are *not* true?

1. Configurations can be restored and edited after the order has been booked.

2. It is possible to complete an order of a configuration that is not valid, meaning it violates the configuration rules defined in the model.

3. Configuration models are created in Oracle Configurator Developer to further constrain existing ATO/PTO BOM models

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Agenda

- Overview of configuring items
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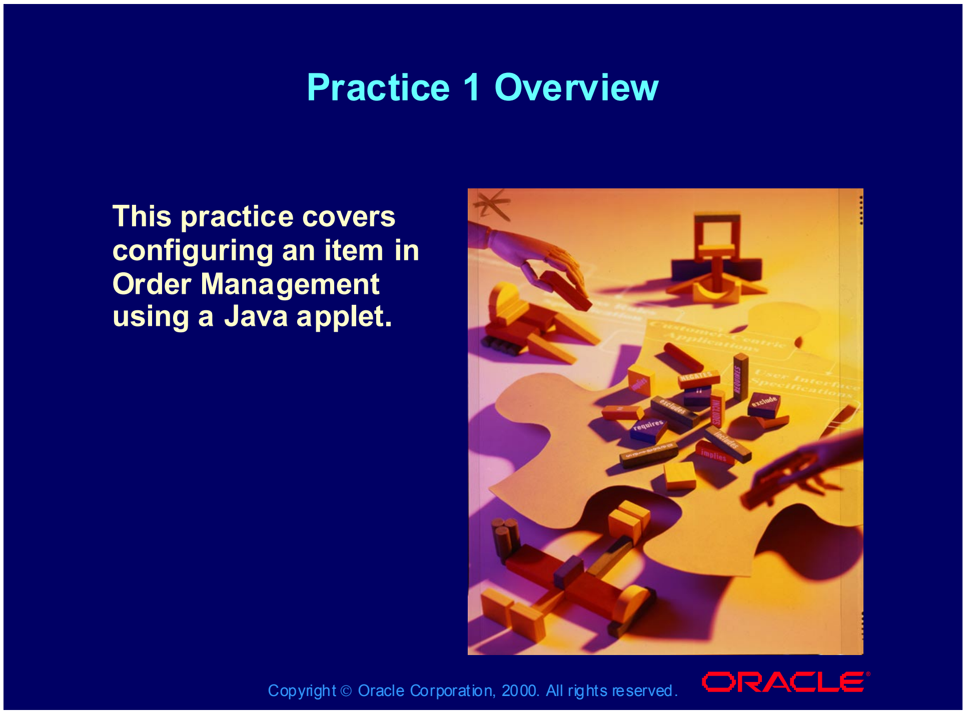
Practice 1 Overview



Details

In this practice you will configure an item in a Java applet window

The configuration Model for the item you are about to configure was created using Oracle Configurator Developer.

Practice 1

Practice 1

- Start Order Management in Oracle Applications
- Configure an item in the Sales Order Window

Note

Switch to the Order Management Super User responsibility.

Practice 1: Build your own laptop using a Java applet window

1. Navigate to the Order Management Sales Orders window

   - (N) Orders, Returns > Sales Orders

2. Select a customer by entering `%b` in the Customer field and choosing Business World 1000. Confirm that the default value of Order Type is “Mixed” or enter Mixed in the Order Type field.

3. Choose the Line Items tab. If the Availability pop up appears, close it.

4. On a line in the Sales Order Pad, enter the following values for Ordered Item and Qty:

   - Ordered Item = CN97444
   - Qty = 1

SAVE THE SALES ORDER INFORMATION.

5. Click the Configurator button. The Java applet appears.

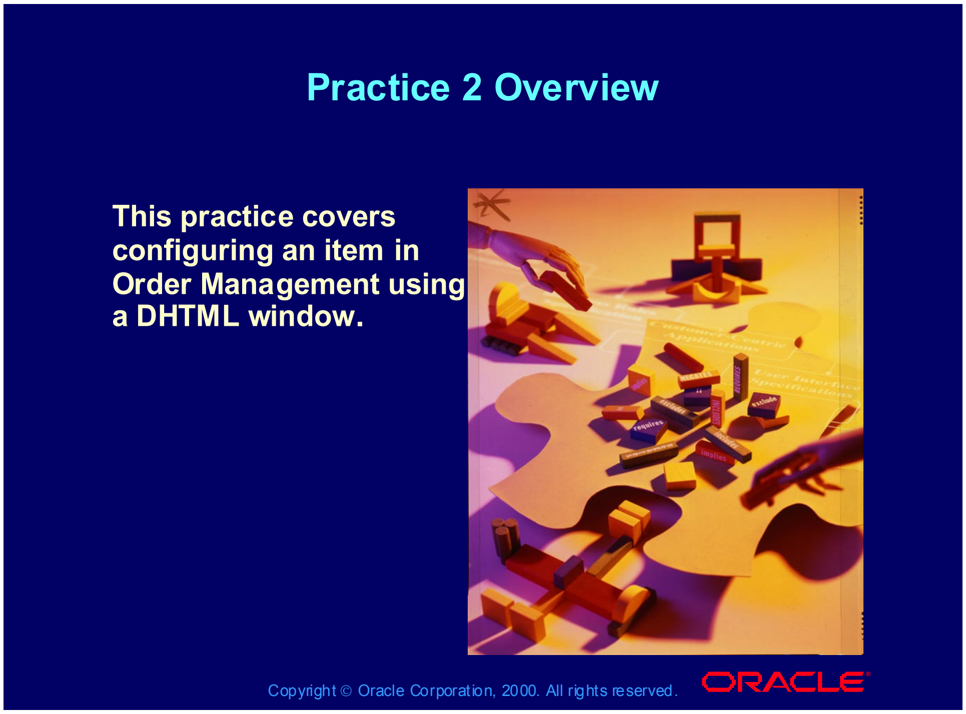
6. Click on each option class in the tree at the left side of the screen to view the available options..

7. From the software option class, select ‘Graphics Software.’

8. Click on the Memory screen and select the option for 16MB of memory. A message informing you that this option is not valid with the Graphics Software that you chose in the previous step. Choose Ok to select the option anyway. Note that the system deselects the conflicting selection (Graphics Software) because it requires more than 16MB of memory.

9. Click Done to save the configuration. The details of line item CN97444 appear in the Sales Orders window.

Practice 2 Overview

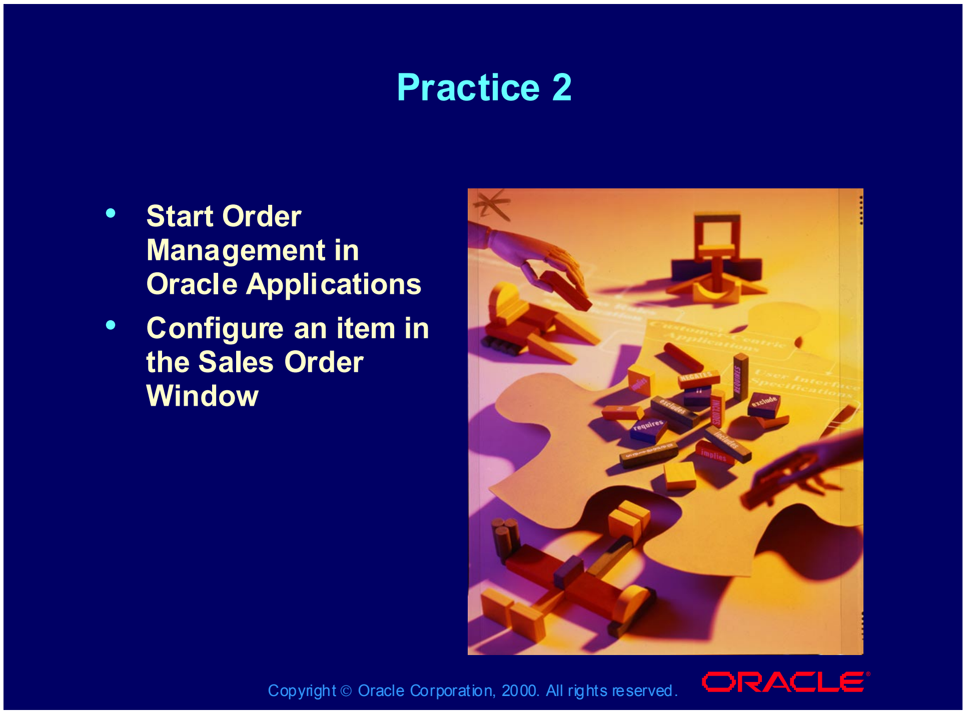


Details

In this practice you will configure an item in a DHTML window.

The configuration model for the item you are about to configure was created using Oracle Configurator Developer.

Practice 2



Note

Switch to the Order Management Super User responsibility.

Practice 2: Build Your Own Desktop using a DHTML window

1. Navigate to the Order Management Sales Orders window
   - (N) Orders, Returns > Sales Orders

2. Select a customer by entering %b in the Customer field and choosing Business World 1000. Confirm that the default value of Order Type is “Mixed” or enter Mixed in the Order Type field.

3. Choose the Line Items tab. If the Availability pop up appears, close it.

4. On a line in the Sales Order Pad, enter the following values for Ordered Item and Qty:
   - Ordered Item = CN92777
   - Qty = 1

SAVE THE SALES ORDER INFORMATION.

5. Click the Configurator button. Item CN92777 (Build Your Own Desktop) appears in a DHTML window.

6. Open the Product Advisor screen.

7. Configure a desktop by entering values according to your specific requirements.

This is the guided buying/selling feature mentioned previously in the course. It is available only when configuring an item in a DHTML window.

Note that some options are selected automatically depending on the options you select.

8. Click the Next button to see the defaulted options for each configuration item. Repeat this step until you have reviewed each screen.

9. Click Done and then click OK to close the window and return to the Sales Orders window.

Summary

Summary

In this module, you should have learned how to:

- describe what makes an item configurable
- describe Oracle Configurator
- explain the different configuration environments available in Order Management
- configure a line item in Order Management
- edit an existing configurable order

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For More Information