Oracle Process Manufacturing Order Fulfillment Release 11*i*

Student Guide

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Preface

Profile

Before You Begin This Course

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

- Work with computers, including use of the mouse
- Demonstrate thorough knowledge of Oracle Applications navigation
- Utilize Oracle Applications Navigational skills
- Identify and explain item attributes: lot control, status control, grade control, dual unit of measure control, and warehouses

Prerequisite Classes

If students have not already acquired the prerequisite skills, they should take the following classes:

Navigating Oracle Applications Release 11i

Oracle Process Manufacturing Basics and Required System Setup Release 11i

Oracle Process Manufacturing Inventory Management Release 11i

How This Course Is Organized

Oracle Process Manufacturing Order Fulfillment Release 11i 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 Process Manufacturing Order Fulfillment User's Guide	Part#A80897-02
Oracle Process Manufacturing Implementation Guide	Part#A77213-01

Oracle Process Manufacturing Inventory Management User's Guide
Part #A77228-02

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.

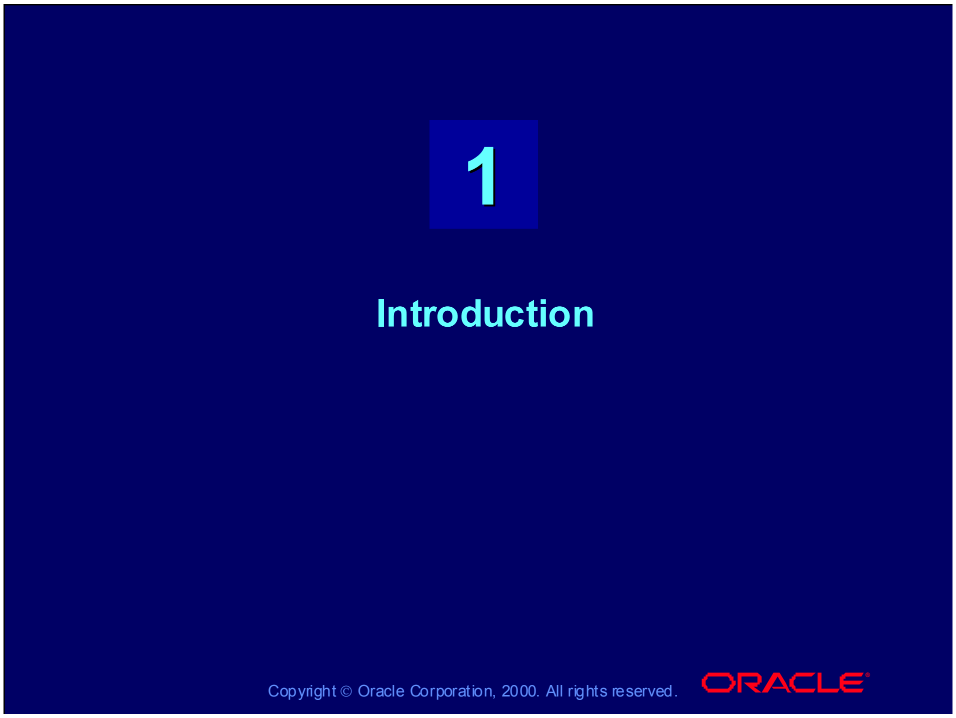
Searching for Help

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.

Introduction

Chapter 1


1
Introduction
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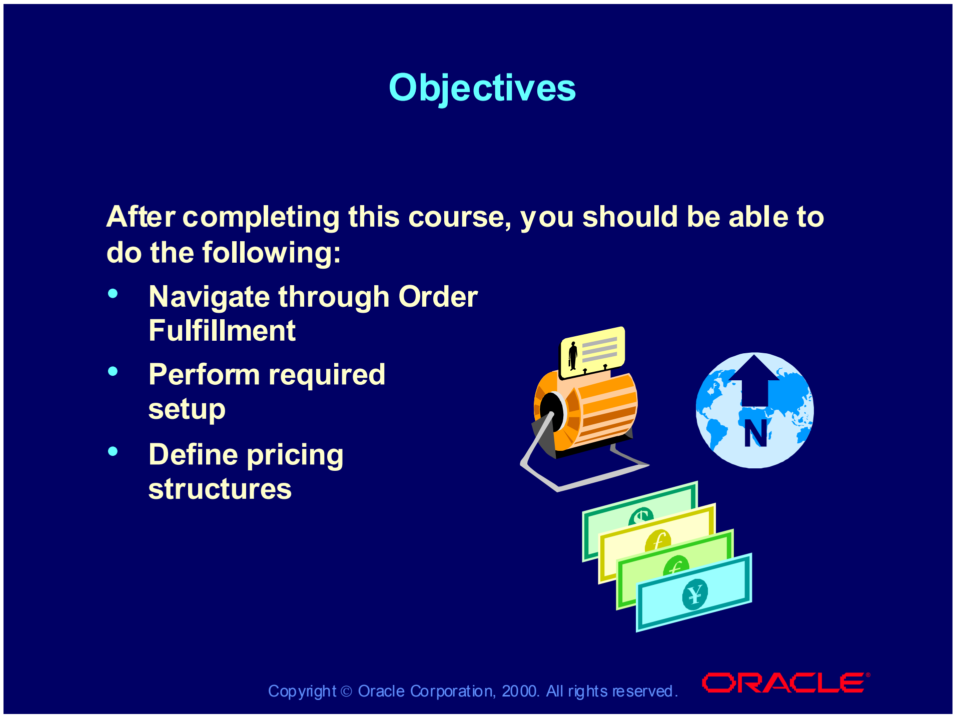


Lesson Aim

This course describes the setup and use of the Oracle Process Manufacturing (OPM) Order Fulfillment responsibility to assist you in providing:

- Timely responses to customer inquiries
- Simplified order entry
- Predefined customer profiles, pricing contracts, and ancillary charges
- Shipping information
- Invoice management

Objectives

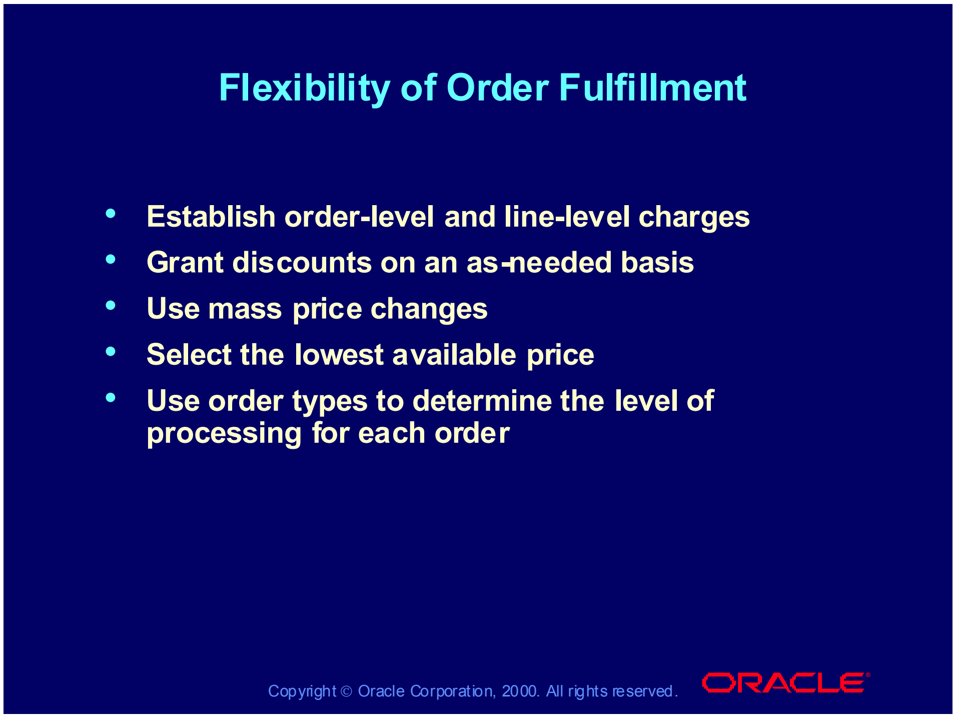
- Create sales order profiles
- Enter and ship sales orders
- Run Order Fulfillment reports

Introduction

OPM Order Fulfillment is designed to:

- Reduce order entry time and overall order cycle time by using predefined pricing schedules and order templates
- Calculate scheduled order ship and delivery dates automatically
- Determine when materials should be processed or ordered to satisfy demand automatically based on the automatic calculation of scheduled order ship dates
- Provide order processing predictability
- Assist order entry personnel in apprising customers of scheduled delivery dates and pricing (including discounts, allowances, and surcharges) at order entry time
- Inform customers as to when an order will be delivered, and at what cost, at the beginning of the sales order process
- Enable users to easily determine order and order line status

Flexibility of Order Fulfillment

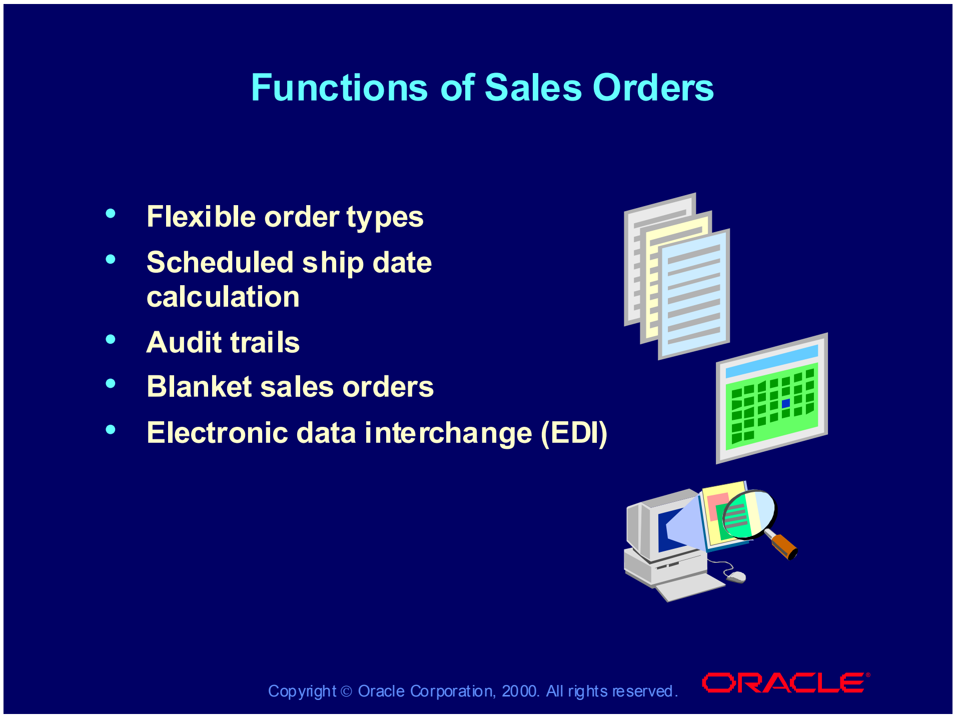


Order Fulfillment's Flexibility

The flexibility of OPM Order Fulfillment enables you to give the best possible price to each customer because you can:

- Establish order-level and line-level charges, discounts, and allowances on a percentage, flat-rate, or per-unit basis
- Grant discounts on an as-needed basis
- Use the mass price change feature to update price modifications onto price lists and contracts
- Flag OPM to select the lowest available price effective for selected ship-to customers
- Use order types to determine the behavior of processing for each order
- Associate an order type with different inventory transactions—consignment and transfer
- Add an order charge as a special charge each time a specific customer or all customers order a particular item
- Generate pro forma invoices that provide the shipping documents used for international environments

Functions of Sales Orders

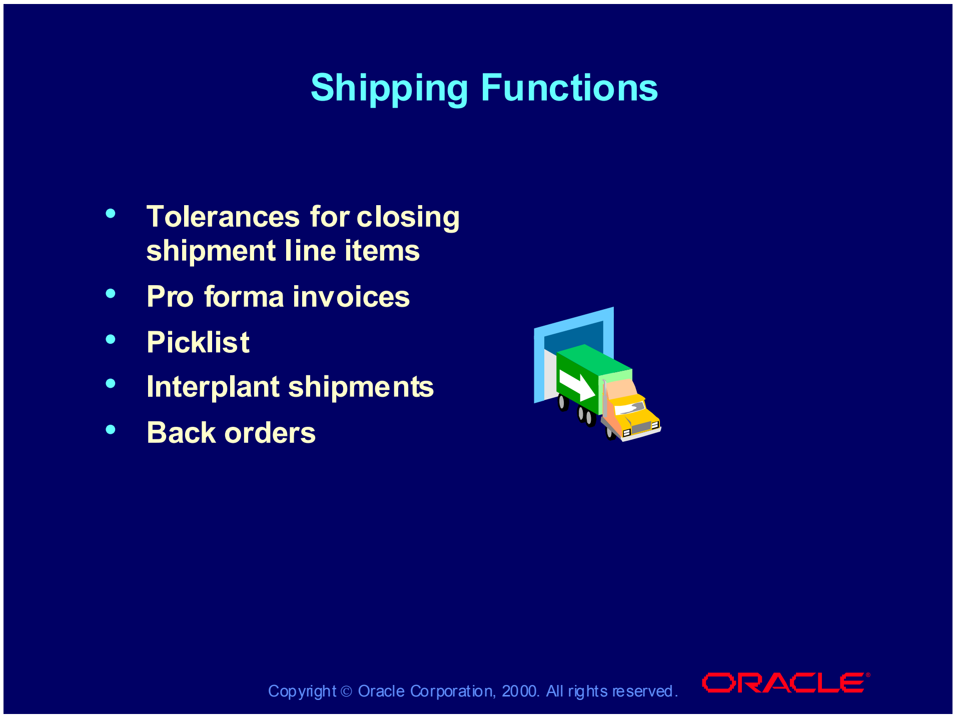


Order Entry

Sales orders can be created from a sales order profile or an existing order. You can use the following functions:

- Flexible order types that determine which processing steps are appropriate for an order and allow mapping of orders to different general ledger accounts
- Scheduled ship date calculation, based on carrier lead time
- Audit trails using inquiries available within OPM, including Lot Genealogy (Lot Source and Where Used) and Credit Checking using the Oracle Accounts Receivable application
- Blanket sales orders to help manage long-term customer commitments
- EDI transactions using Oracle EDI Gateway to electronically exchange business transactions

Shipping Functions



Shipping

You can ship sales orders by using the following functions:

- Tolerances for closing shipment line items defined when creating a customer record in Oracle Accounts Receivable
- Pro forma invoices as shipping documents
- Picklist set up by warehouse to follow internal identification standards
- Interplant shipments for maintaining customer consignment warehouses and inventory movement
- Back orders to be created if a customer wants all materials shipped from the order

Reports and Inquiries

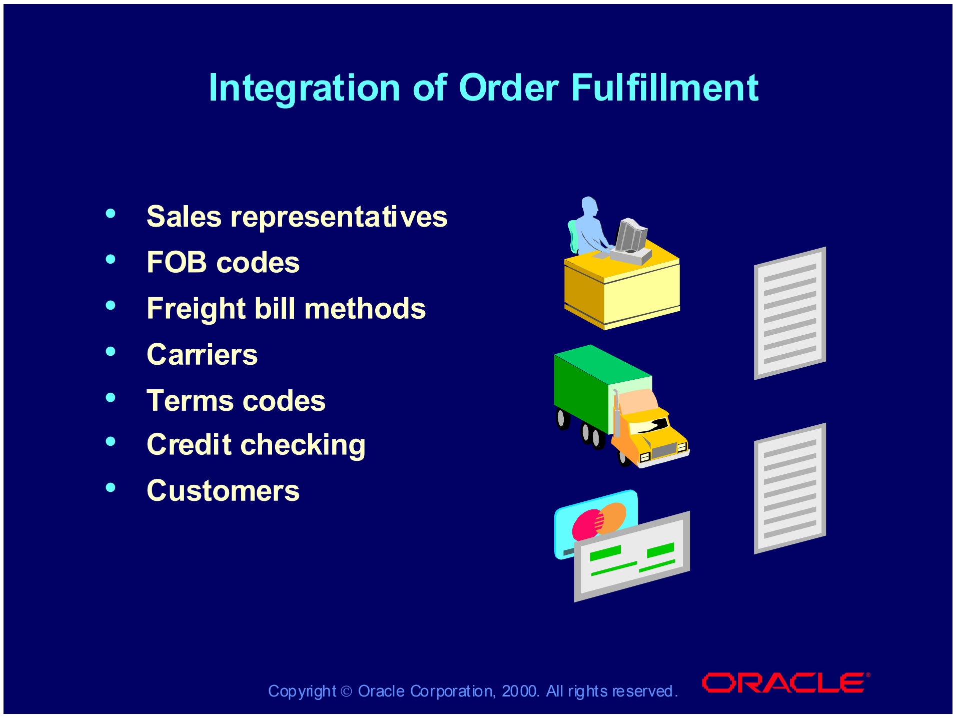
Reports and Inquiries

To facilitate your ability to respond efficiently and accurately to customer orders, OPM maintains centralized, detailed account information that defines your business relationship with every customer.

Reports and Inquiries

- Bill of Lading
- Shipping Picklist
- Order Inquiry
- Customer Inquiry
- Effectivity Search on price lists, contracts, and charges

Integration of Order Fulfillment



Integration Overview

OPM Order Fulfillment's tight integration with Oracle Financials creates a central repository of customer-specific and general financial information. This includes currency codes and exchange rates, free on board (FOB) codes, shipping terms, charts of accounts, and fiscal calendars. In addition, OPM uses information from Oracle Accounts Receivable and performs credit checking to suspend or defer inventory commitments.

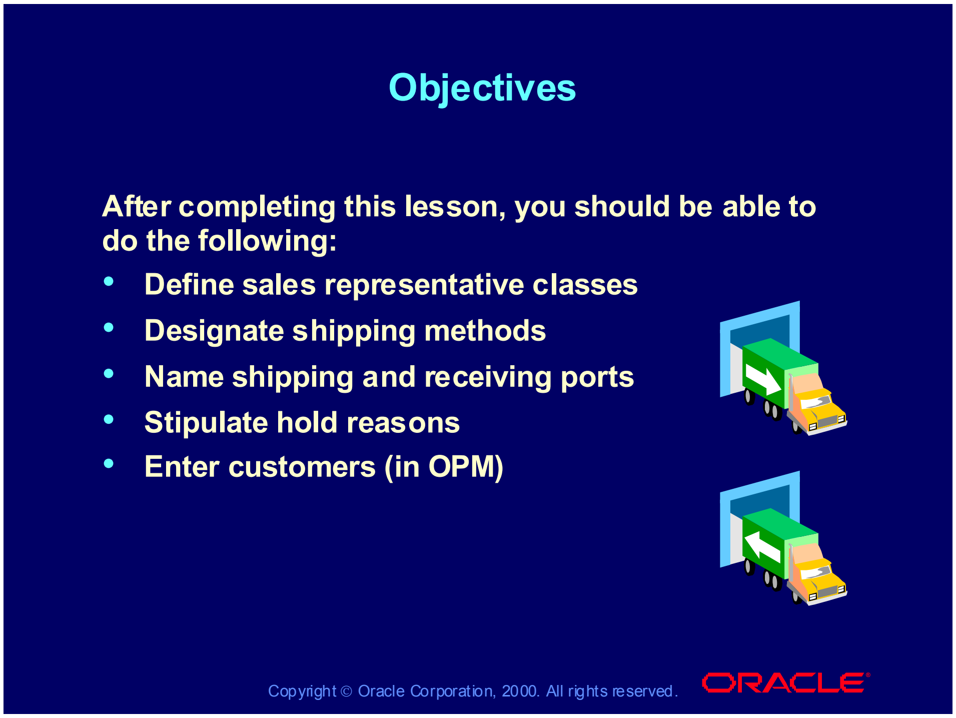
Performing Sales Management Setup

Chapter 2

2

Performing Sales Management Setup

Objectives



Lesson Topics

This lesson describes the primary forms used in sales order processing. Most of the setups covered in this lesson are done when OPM Order Fulfillment is not integrated with Oracle Financials. Sales representatives and customer associations are defined in Oracle Accounts Receivables when integrated to OPM.

Defining Sales Representative Classes

Overview

Sales representative classes group sales representatives for reporting purposes. You choose the grouping criteria and assign a sales representative classification code to each sales representative that you define.

Note: Sales representative classes are not used when OPM is integrated with Oracle Financials.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Class and Code Setup > Defining Sales Representative Classes

... > Defining Sales Representative Classes Procedure

... > Sales Representative Classes Field Reference

Designation Shipping Methods

Overview

Shipping method codes define how an order is shipped. You can also designate the route used to ship goods. This information is useful to the shipping department when determining how to load the truck for delivery.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Shipping Setup > Defining Shipping Methods

... > Defining Shipping Methods Procedure

... > Shipping Methods Field Reference

Naming Shipping and Receiving Ports

Overview

You use the Ports window to specify the embarkation and debarkation ports from and to which you ship goods. For each shipping or receiving port that you establish, you can also add address details in the Address Edit window.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Shipping Setup > Defining Shipping/Receiving Ports

... > Defining Shipping/Receiving Ports Procedure

... > Shipping/Receiving Ports Field Reference

... > Shipping/Receiving Ports - Action Menu Options

Stipulating Hold Reasons

Overview

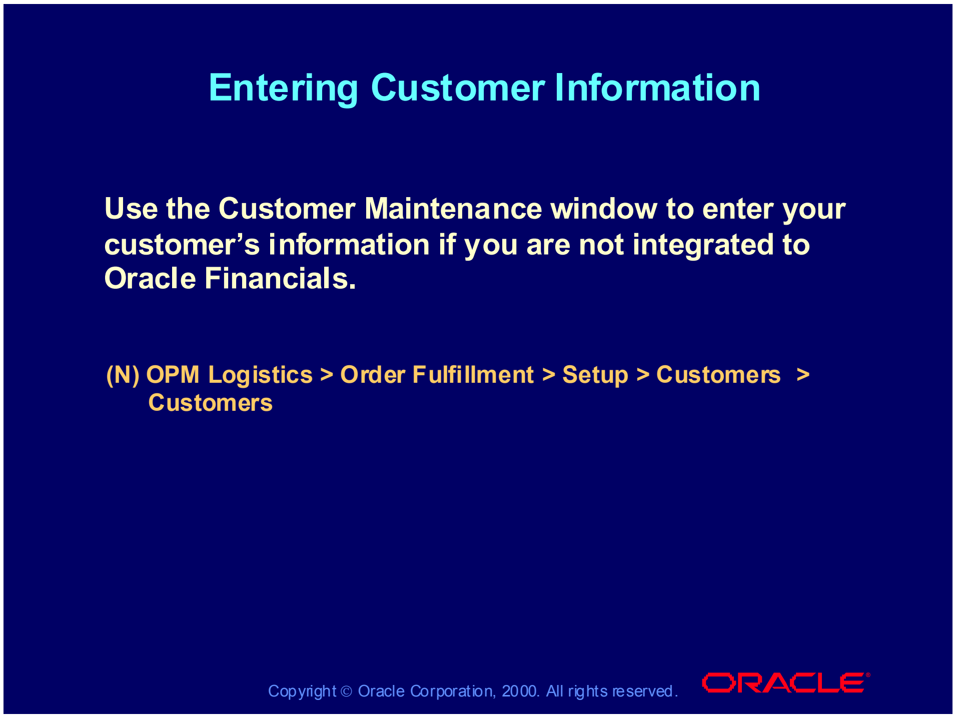
Hold reason codes indicate situations in which commitments, picking, shipping, and invoicing of ordered goods should be halted. You can place a hold on an entire order or on individual order lines.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Class and Code Setup > Defining Hold Reason Codes

... > Defining Hold Reason Codes Procedure

... > Hold Reason Codes Field Reference

Entering Customer Information



Customers

To enter a customer for OPM to:

1. Indicate the type of customer you are defining.
   - Select Normal if this is a regular customer to whom you ship ordered goods.
   - Select Consignment if you ship inventory to the customer warehouse for storage.
   - Select Transfer if the customer is a warehouse within your own organization.

Note: OPM refers to the order type to determine order processing parameters, regardless of which customer type is designated.

2. Enter order and shipping information

Note: If OPM is integrated with Oracle Financials, you enter most of the customer and carrier information through Oracle Receivables and synchronize it to the OPM Customer table. You will have access only to the following fields in the OPM Customer Order and Shipping window: To Warehouse, Price Customer, Customer Items Only, and Use Lowest Price.

Customers (continued)

3. Enter billing and other information.

Note: If OPM is integrated with Oracle Financials, you enter most of the customer information through Oracle Receivables and synchronize it to the OPM Customer table. You will have access only to the Trade Class field on this form.

4. Identify customer contacts.

Note: If OPM is integrated with Oracle Financials, you enter most of the customer information through Oracle Financials and synchronize it to the OPM Customer table. You will have access only to the Place Orders check box.

5. Identify customer carriers.

Note: If OPM is integrated with Oracle Financials, you enter most of the customer information through Oracle Receivables and synchronize it to the OPM Customer table. All of the fields in the Customer Carriers window are accessible.

6. Restrict customer items.

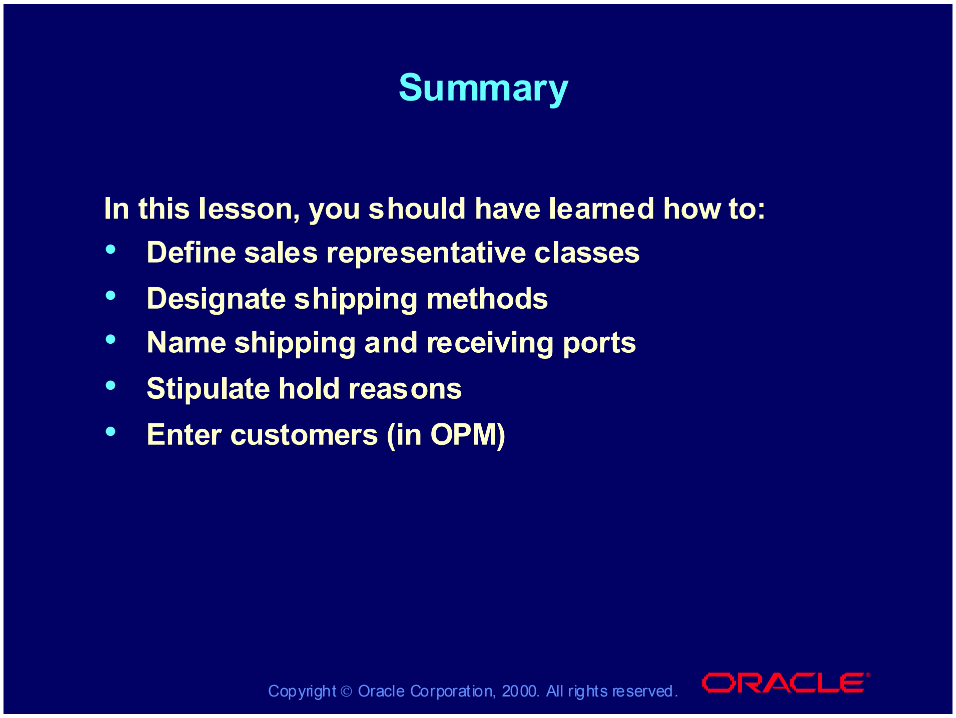
Note: If OPM is integrated with Oracle Financials, you enter most of the customer information through Oracle Receivables and synchronize it to the OPM Customer table. All of the fields in the Customer Items window are accessible.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Defining Customer Information

... > Defining Customer Information Procedure

... > Customer Information Field Reference

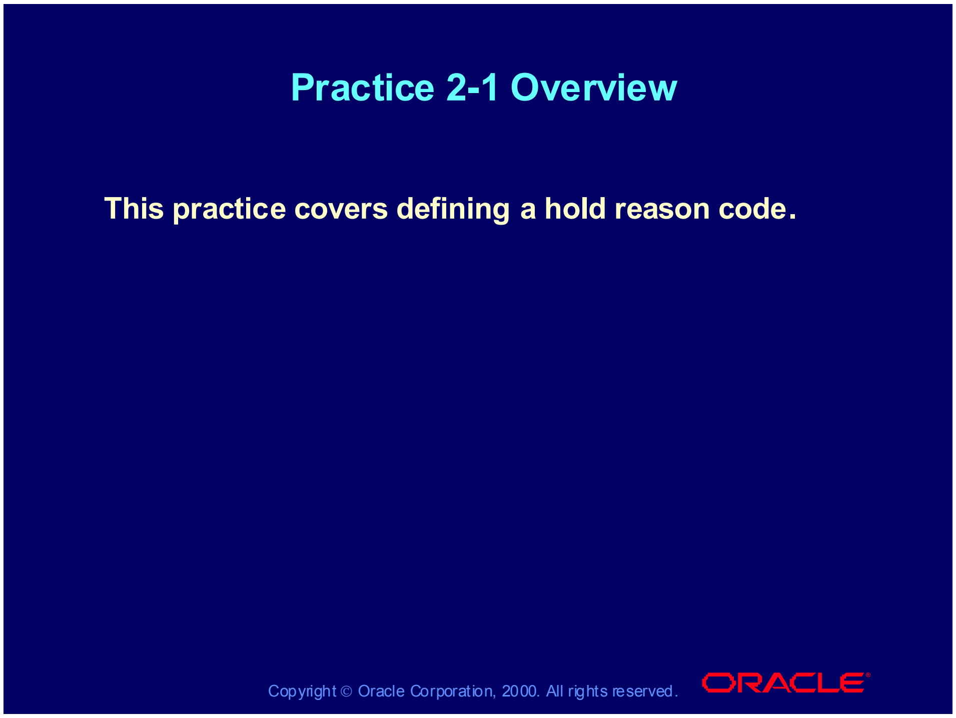
Summary



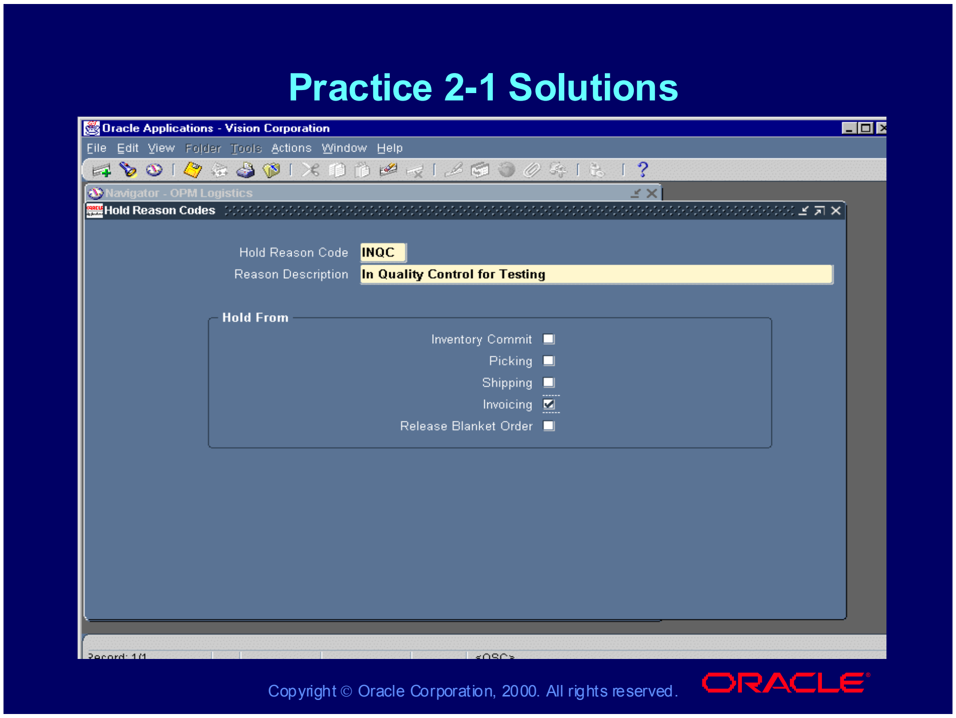
Summary

Performing the initial setups for OPM Order Fulfillment will enable you to use the multiple features of the application.

Practice 2-1 Overview



Practice 2-1 Solutions



Defining Hold Reason Codes

1. Navigate to the Hold Reason Codes window.

   (N) OPM Logistics > Order Fulfillment > Setup > Classes/Codes > Hold Reason Codes

2. Enter a code that identifies the reason that you are placing the order on hold. Begin the code with the two letters assigned by your instructor.
3. Enter a brief description of the hold reason.
4. Clear the check box to allow inventory commitment.
5. Clear the check box to indicate that inventory picked for the order may be included on the shipment.
6. Clear the check box to indicate that shipments should be released.
7. Select the check box to indicate that invoice generation should be prevented for a sales order or order line.
8. Clear the check box to indicate that Releasing from a Blanket Order should not be allowed.
9. Save the hold reason code by selecting Save from the Action menu or click the Save icon on the toolbar.

Performing Customer Setup

Chapter 3


3
Performing Customer Setup
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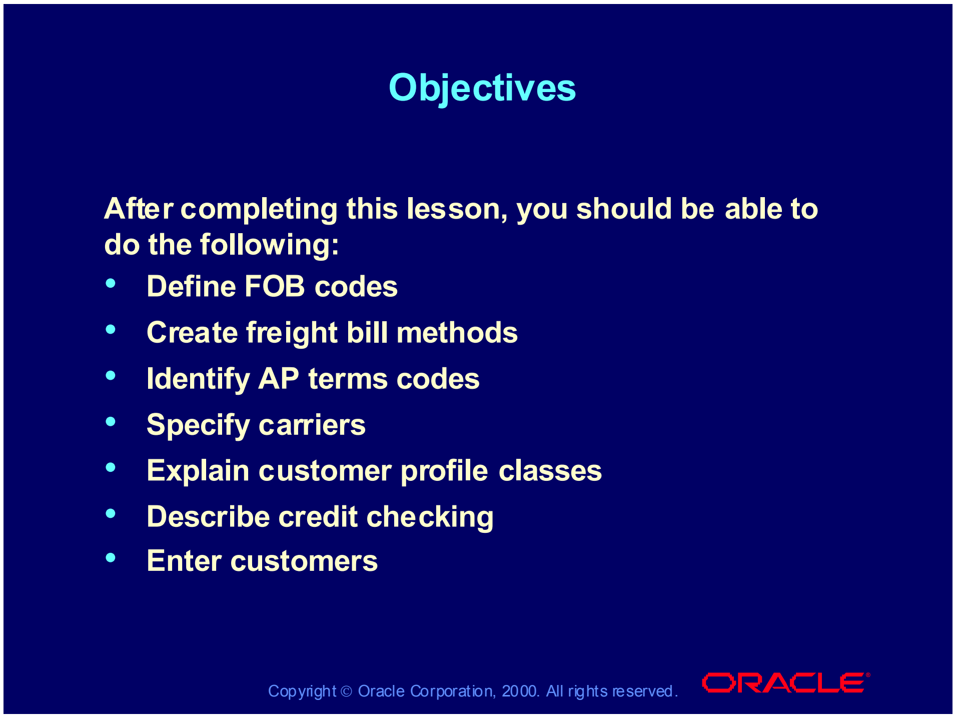
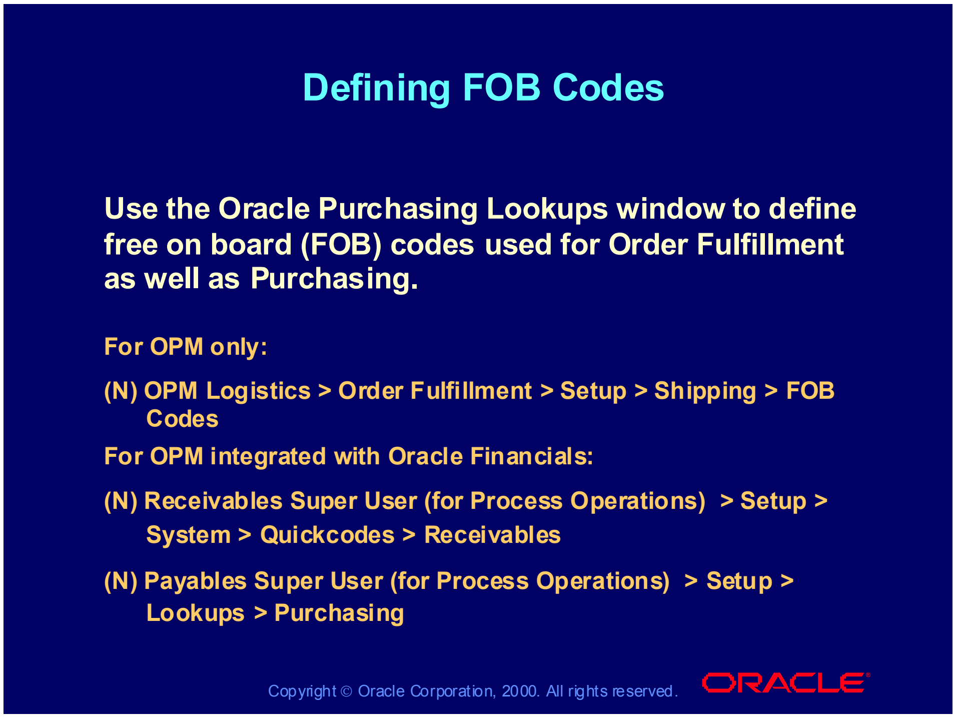
Objectives



Lesson Topics

This lesson describes the setup requirements for creating customer records when OPM is integrated with Oracle Financials. Setups and data synchronization will be discussed.



Free on Board (FOB)

In order to use FOB codes in OPM Order Fulfillment you must define the FOB code in both Oracle Receivables and Oracle Payables. FOB codes are only brought into OPM from the AP FOB code table through a database trigger. Oracle Payables enables you to define up to a 15-character FOB code. The trigger is designed to use the first four characters of the Oracle FOB code in OPM. If duplication occurs, the system automatically changes the last character of the OPM code, beginning with numerics.

For OPM only:

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Shipping Setup > Defining Free On Board (FOB) Codes

... > Defining Free On Board (FOB) Codes Procedure

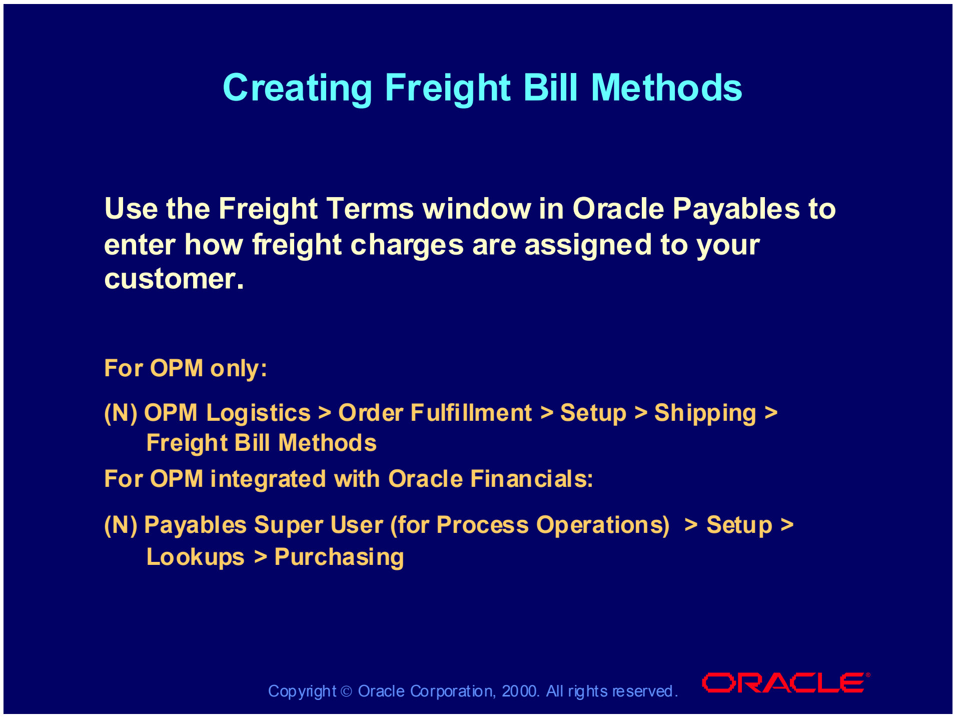
... > FOB Codes Field Reference

... > FOB Codes - Actions Menu Options

For OPM integrated with Oracle Financials:

(Help) Oracle Manufacturing Applications > Oracle Payables > Setup > Lookups

Creating Freight Bill Methods



Freight Bill Methods

In an integrated system, freight bill methods are automatically triggered from OPM to Oracle Payables. You can enter up to a 15-character code in the Oracle Financials Freight Terms field and the system will automatically create a 4-character code in the Method field. In Oracle Payables you will see the 15-character code you originally defined.

For OPM only:

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Shipping Setup > Defining Freight Bill Methods

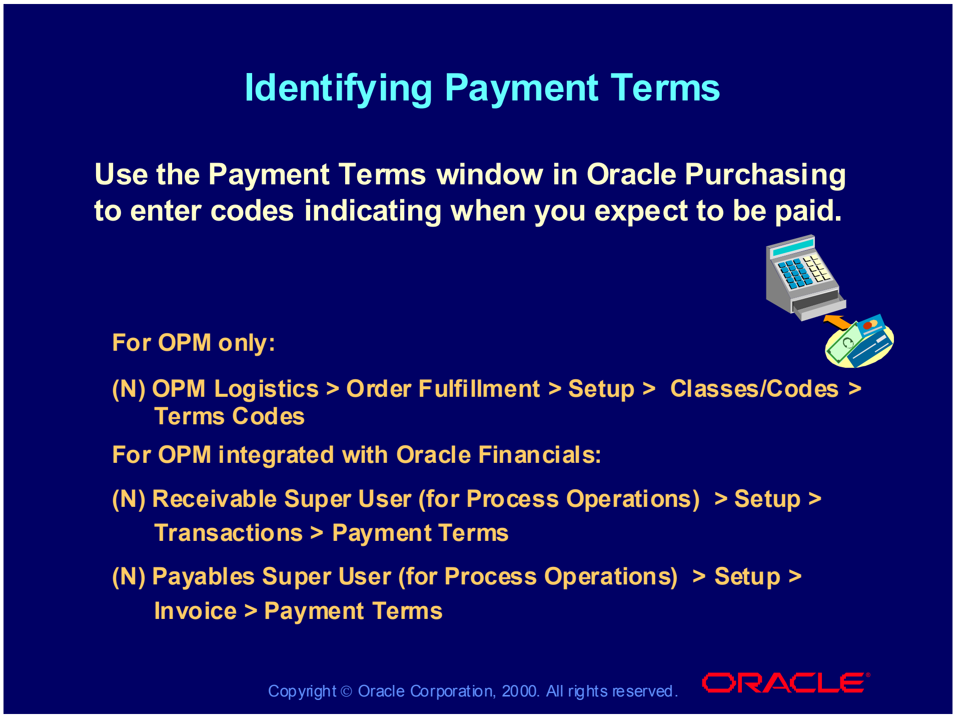
... > Defining Freight Bill Methods Procedure

... > Freight Bill Methods Field Reference

For OPM integrated with Oracle Financials:

(Help) Oracle Manufacturing Applications > Oracle Payables > Setup > Lookups

Identifying Payment Terms



Payment Terms

Terms codes are synchronized to OPM in the same manner as FOB codes when OPM is integrated with Oracle Financials. You must enter your payment terms in both Oracle Receivables and Oracle Payables, and the AP terms codes are automatically triggered to the OPM Terms Codes table. The Terms field in Oracle Payables allows for a 15-character code. The system automatically concatenates the code, using the first four characters. If concatenation causes duplication, the system automatically drops the fourth character and uses an ASCII sort to distinguish each code.

For OPM only:

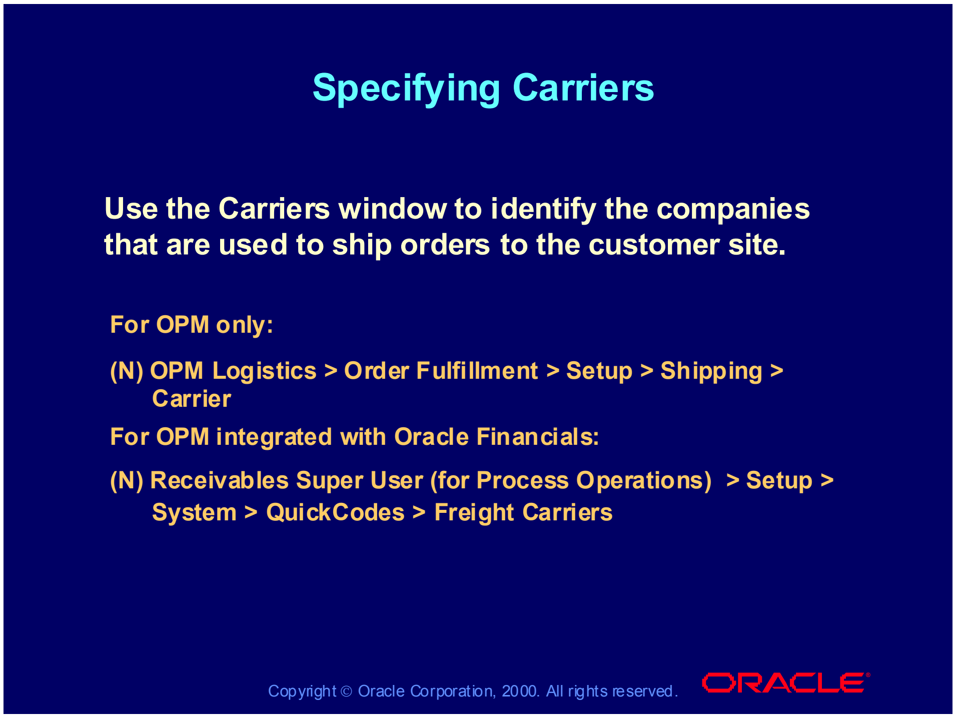
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Class Code Setup > Defining Terms Codes

... > Defining Terms Codes Procedure

... > Terms Codes Field Reference

For OPM integrated with Oracle Financials:

(Help) Oracle Manufacturing Applications > Oracle Purchasing > Setting Up > Defining Document Types > Defining Financials Options



Carriers

Carrier codes identify the companies that ship orders. You can use the Address Edit option on the Carriers window Special menu to maintain the addresses for each of the carriers.

For OPM only:

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Shipping Setup > Defining Carriers

... > Defining Carriers Procedure

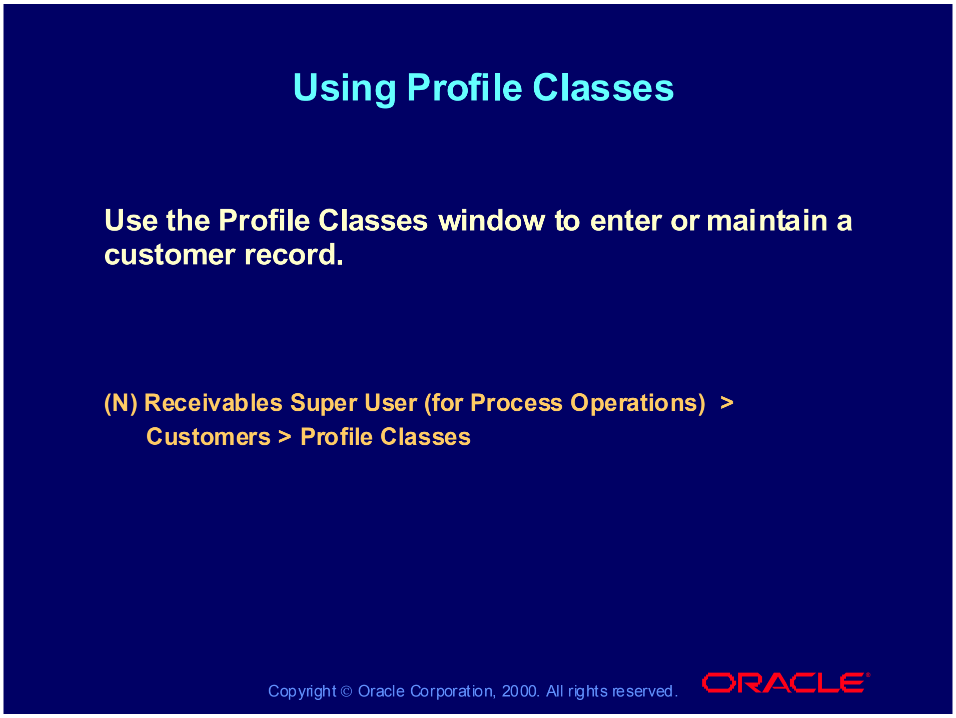
... > Carriers Field Reference

... > Carriers - Action Menu Options

For OPM integrated with Oracle Financials:

(Help) Oracle Manufacturing > Oracle Inventory > Setting Up > Inventory Structure > Defining Freight Carriers

Using Profile Classes

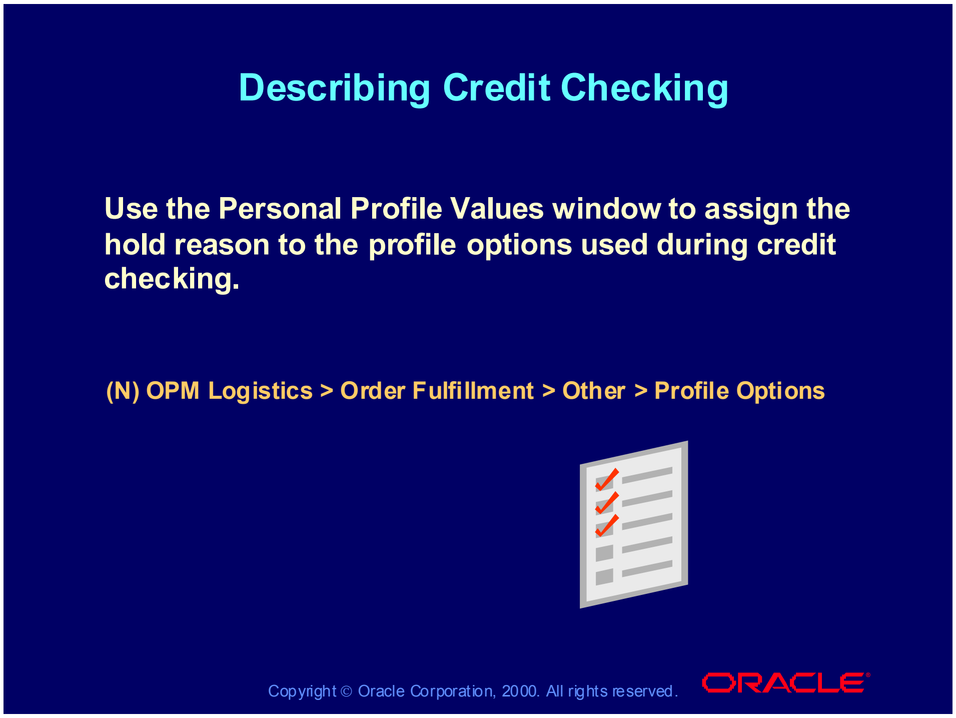


Profile Classes

Use the Oracle Receivables Profile Classes window to establish credit limits for a customer per currency. You must enable the Credit Check flag if you want OPM Sales Order entry to perform credit checking. You must have exchange rates to the customer's base currency for credit checking to be valid. If an exchange rate is missing, the system notifies the user.

(Help) Oracle Manufacturing Applications > Oracle Receivables Topics > Customers > Profile Classes

Describing Credit Checking



Setting Profile Values

Note: You must set up the following profile values to determine the hold used during Oracle Financials credit checking:

OP$CHK_NOT_SUCCESS: Hold reason code assigned if the credit check is not successful

OP$CUST_HLD: Hold reason code assigned if the customer is on credit hold

OP$CUST_LIMIT_EXCEED: Hold reason code assigned if the customer’s credit limit has been exceeded

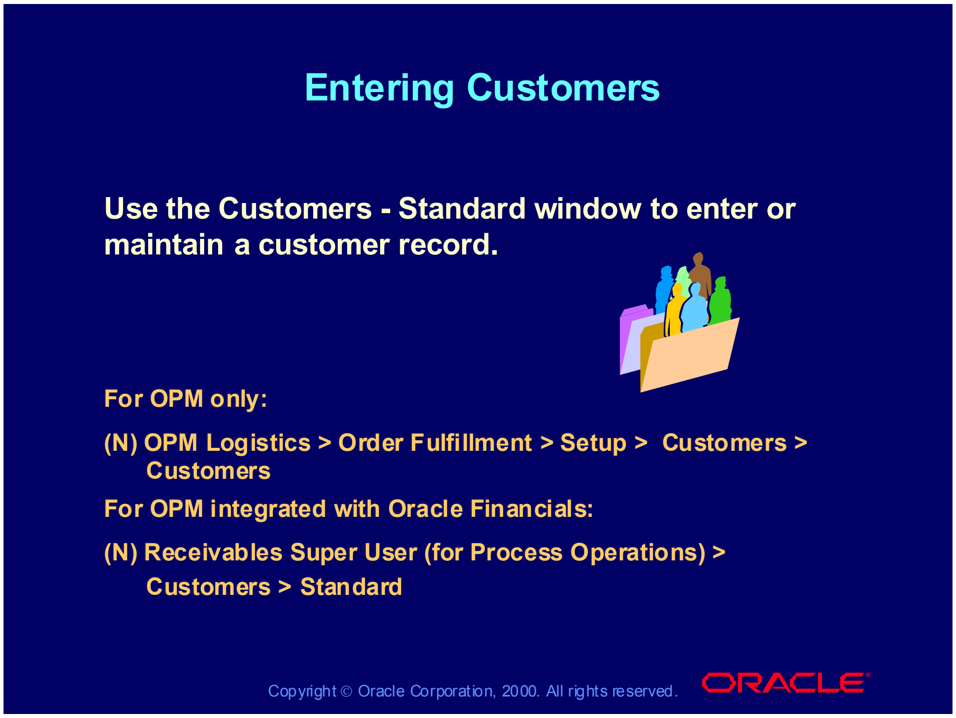
The calculation used to determine if a customer is over credit limit is:

Current Accounts Receivables Balance + Open Sales Orders + On-screen Order Amount + tolerance %

Note: You can set a credit limit per order as well as a total credit limit per customer.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Appendixes > Profile Options Related to Order Fulfillment

Entering Customers



Customer Information

When entering a customer, you must first fulfill certain setup requirements in order for that customer record to synchronize into OPM successfully. For more information on how to define a customer, see the *Oracle Process Manufacturing Implementation Guide, Release 11i.*

For OPM only:

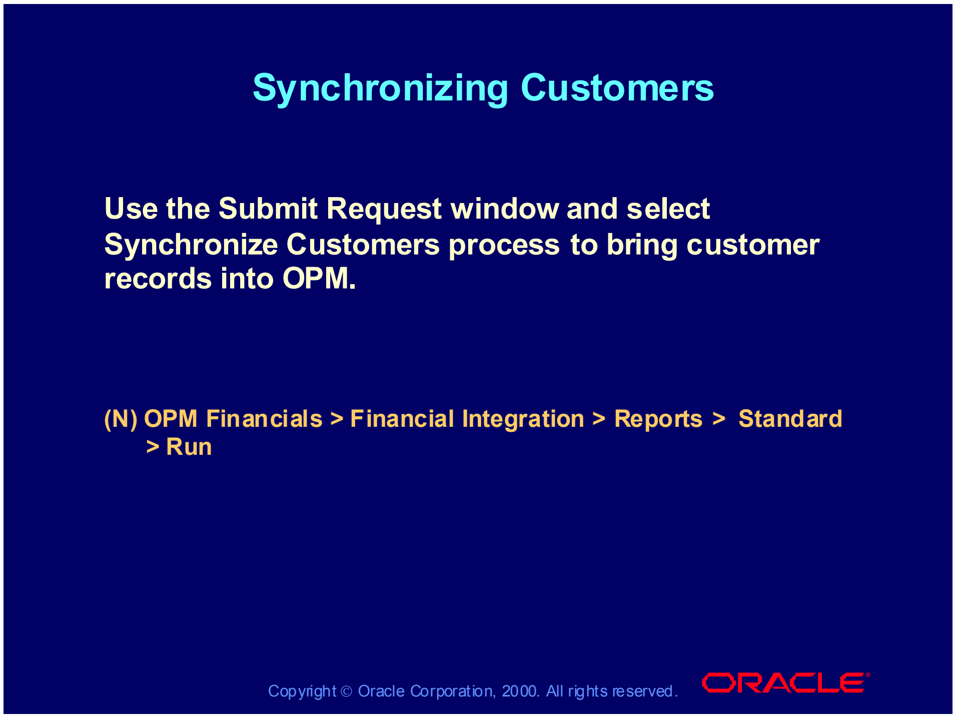
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Defining Customer Information

... > Defining Customer Information Procedure

... > Customer Maintenance Field Reference

For OPM integrated with Oracle Financials:

(Help) Oracle Manufacturing Applications > Oracle Receivables Topics > Customers > Entering Customers



Synchronizing Customers

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Financials > OPM and Oracle Financials > Accounts Receivables and OPM Integration

Summary

Summary

In this lesson, you should have learned how to:

- Define FOB codes
- Create freight bill methods
- Identify AP terms codes
- Specify carriers
- Explain customer profile classes
- Describe credit checking
- Enter customers

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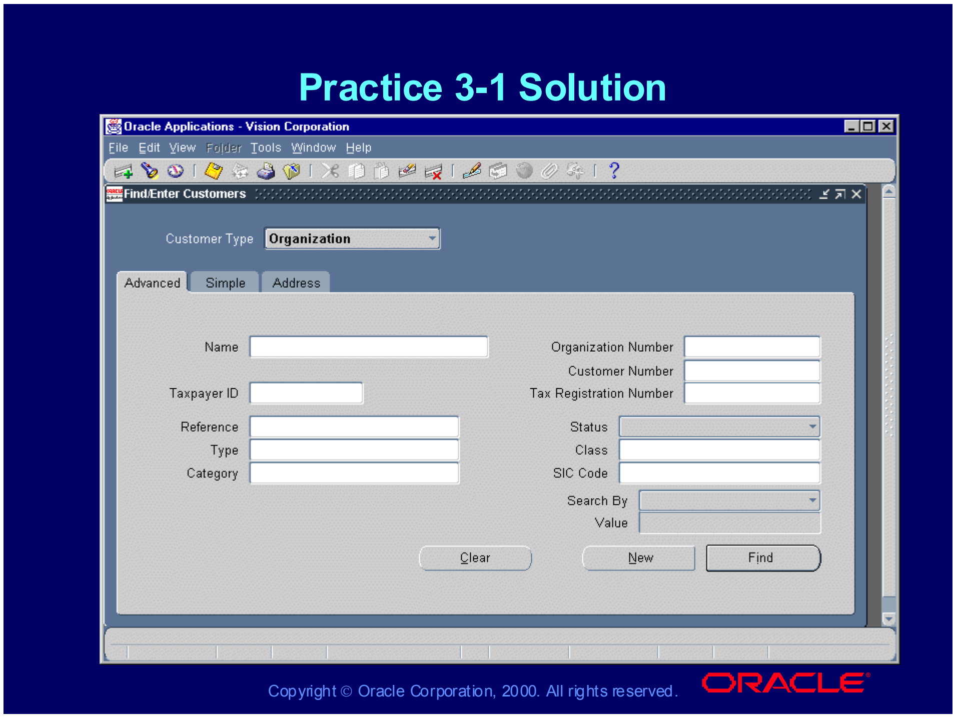
Practice 3-1 Overview

Practice 3-1 Solution



Creating a Customer

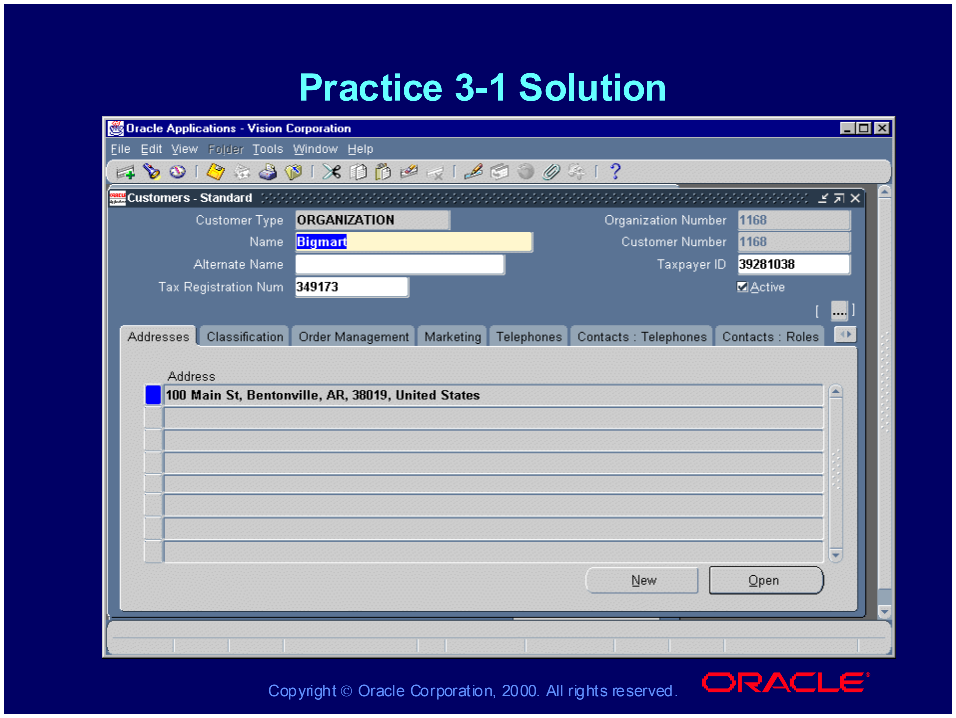
1. Navigate to the Customers - Standard window.

   (N) Receivables Super User (for Process Operations) > Customers > Standard

2. In the Find/Enter window select Organization from the drop-down list in the Customer Type field.

3. Click the New button. The Customers - Standard window opens.

Practice 3-1 Solution



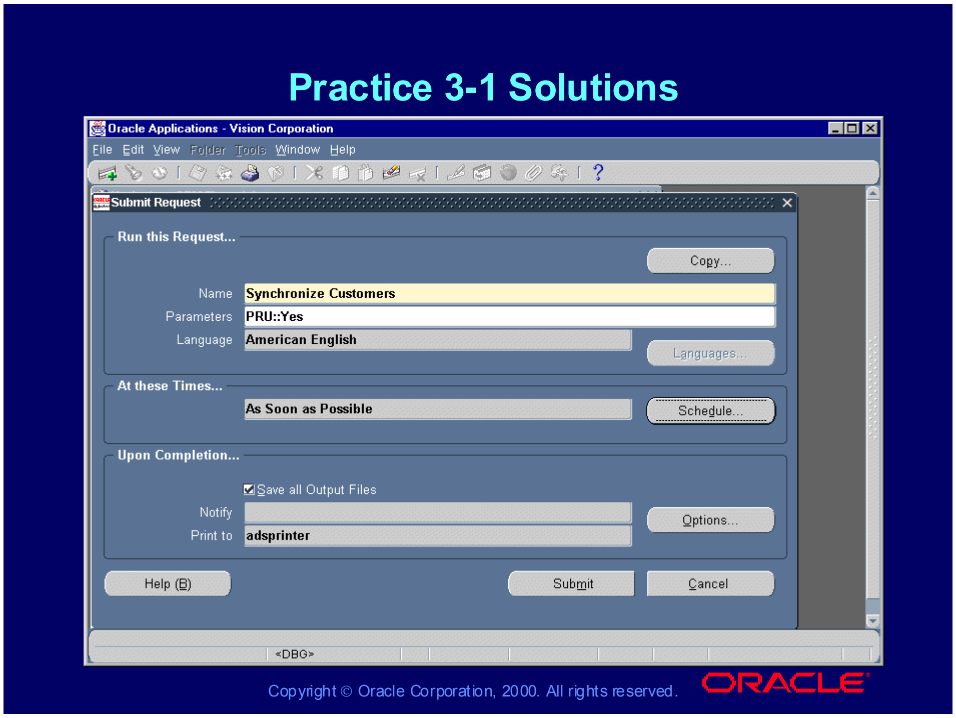
Creating a Customer (continued)

4. Enter the name of your customer.
5. In the Addresses tabbed page, click New. The Customer Addresses - <*customer name*> window opens.
6. Enter the customer address.
7. Click the descriptive flexfield box and select the default freight bill method (optional) and the ship-from warehouse for this customer from the list of values.
8. In the Business Purposes tabbed page, click the New button or click the blue highlighted box next to the Usage field.
9. Select Bill To from the list of values for the Usage field.
10. Enter a unique location identifier.
11. Select the Primary check box.
12. Select the Active check box.
13. Go to the next line and select Ship To from the list of values in the Usage field.
14. Select the Active check box.
15. Close the addresses window.

Creating a Customer (continued)

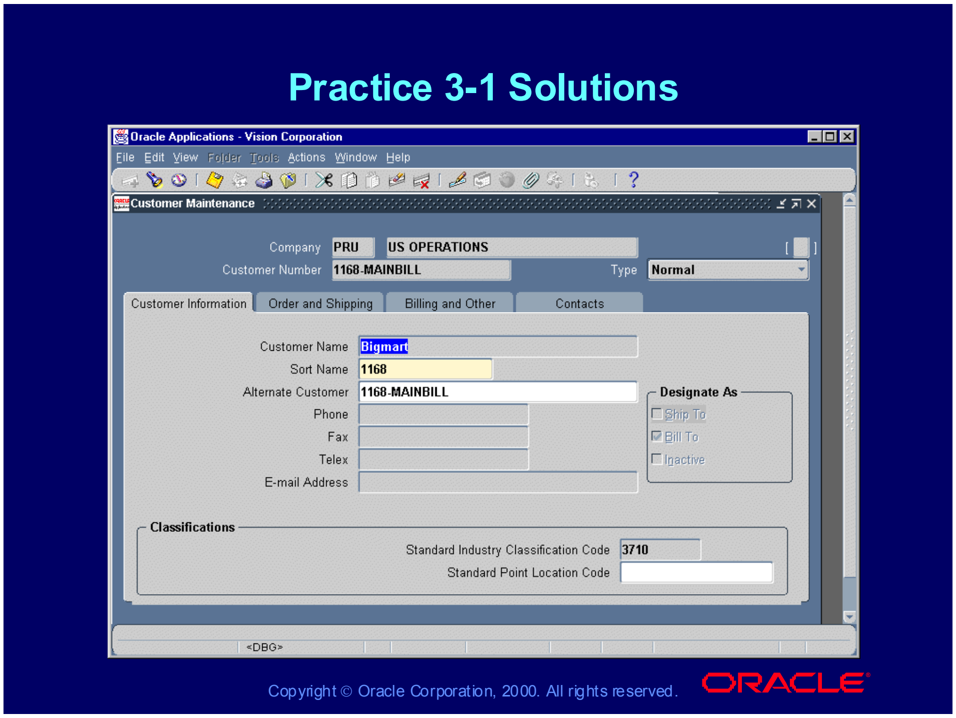
16. In the Classification tabbed page, select External from the drop-down list in the Type field.
17. In the Order Management tabbed page, select Yes from the drop-down list in the Ship Partial field.
18. Select an FOB code from the list of values.
19. In the Contacts : Telephones tabbed page, select a contact name from the list of values.
20. Using the arrow to the right of the tabs, select the Profile : Transaction tab to enter the profile class that will set the currencies, currency rates, and limits in the Profile : Amounts region.
21. Save your record.
22. Switch responsibilities to OPM Financials.

Practice 3-1 Solutions



Creating a Customer (continued)

23. Navigate to the Requests window.
    (N) OPM Financials > Financials Integration > Reports > Standard > Run
24. Select the Single Request option button in the Submit Request window.
25. Click OK.
26. Select Synchronize Customers from the list of values in the Name field of the Submit Request window.
27. In the Parameters window select the company from the list of values.
28. Enter the customer or synchronize all customers.
29. Click OK.
30. Accept all other defaults and click Submit.
31. A request ID will be assigned. Click No in the Decision window to submit another request.
32. Navigate to View to see if your request has processed.
33. Select the All My Requests option button in the Find Requests window.



Creating a Customer (continued)

34. Click Find. The Requests window opens.
35. If the process completed normally, navigate to OPM Customers to see if your record was synchronized to OPM.

    (N) OPM Logistics > Order Fulfillment > Setup > Customers > Customers
36. If the process completed with an error or a warning, submit a new request and run the View Interface Exception report.

Performing Order Fulfillment Setup

Chapter 4


4
Performing Order Fulfillment Setup
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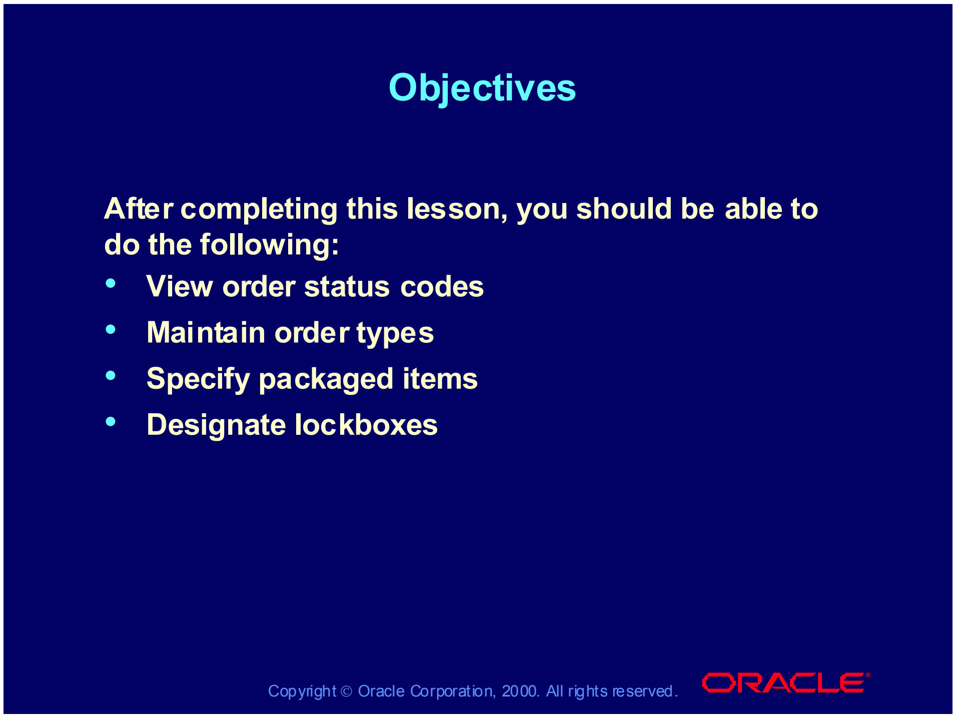


Lesson Topics

This lesson describes the order status codes and order types that determine the processing of your sales order, the maintenance of packaged items, and the designation of lockboxes.

Viewing Order Status Codes

Use the Order Status window to view the predefined status codes that indicate the processing stage of an order.

(N) OPM Logistics > Order Fulfillment > Setup > Classes/Codes > Order Status

Order Status

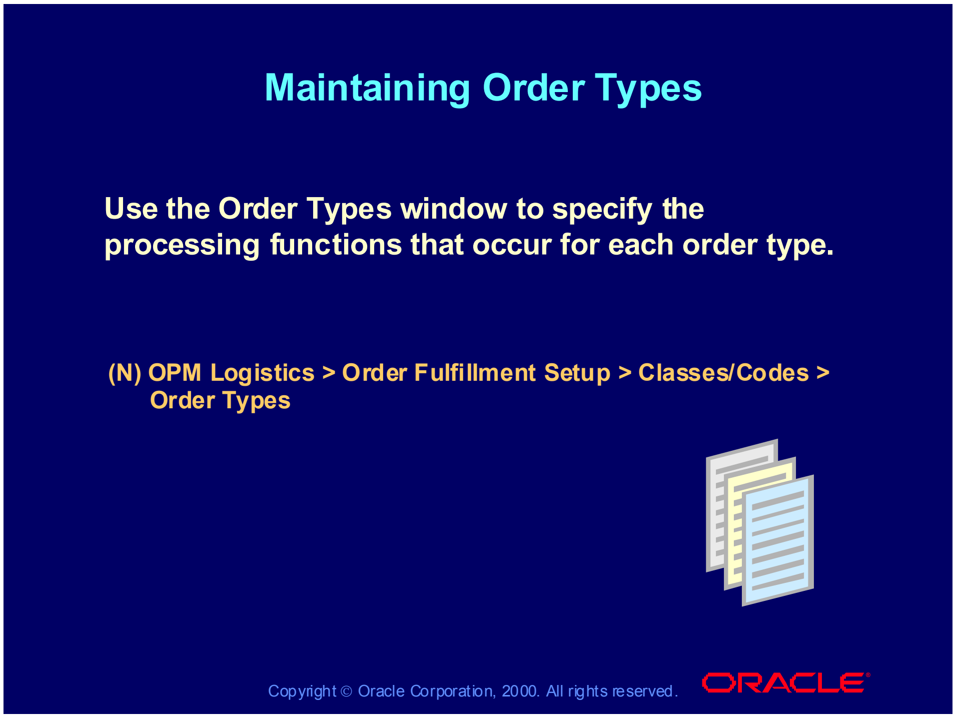
Order status codes indicate the processing stage for a sales order. Oracle Process Manufacturing (OPM) Order Fulfillment provides a series of predefined order status codes. You can enter new descriptions for these status codes to better fit your enterprise's order processing procedures.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Class and Code Setup > Editing Order Status Descriptions

... > Editing Order Status Descriptions Procedure

... > Order Status Field Reference

Maintaining Order Types



Order Types

Order types determine which processing steps apply to an order. Examples of order types include the following:

- Normal orders
- Samples
- Transfer orders or consignment

You can specify the processing functions that you want to occur for each order type. For example, you can determine:

- Which inventory type to use
- How to process the order for shipping
- If taxes will be calculated for the orders
- How to price orders: automatically by line or order total, or manually
- Whether to perform a credit check or generate an audit trail
- Whether to create invoices for orders
- Whether to produce picklist or pro forma invoice reports

Order Types (continued)

Order type is also part of the account selection processing, so that orders can be mapped to different accounts based on the order type used.

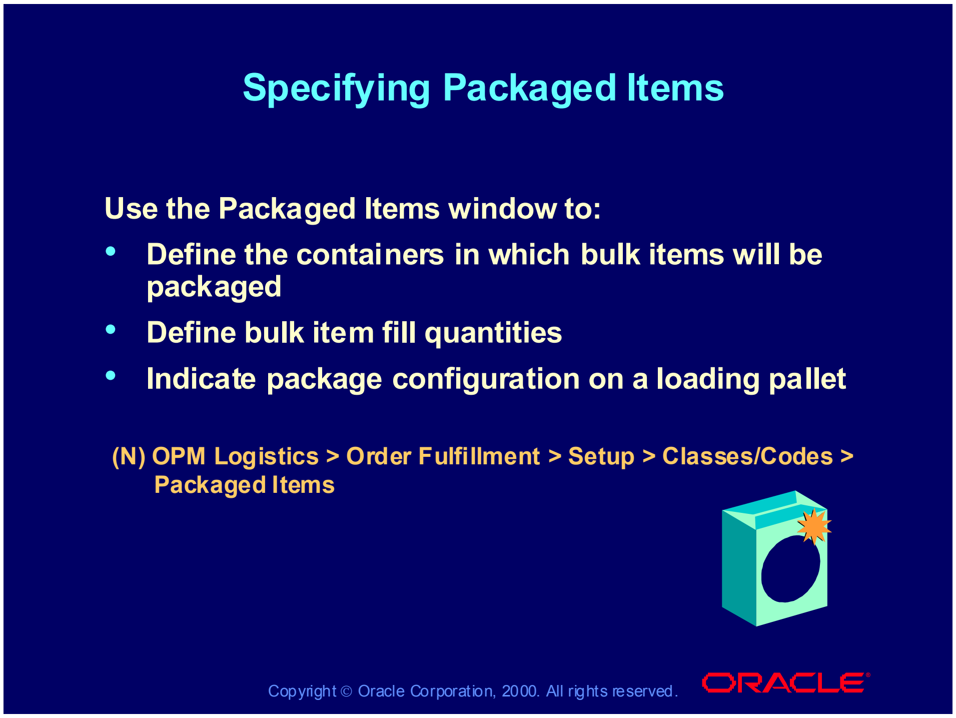
Note: The order type code and language code together produce the order type key; each type code and language code combination must be unique.

(Help) Oracle Manufacturing Applications Order Types > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Class and Code Setup > Defining Order Type Codes

... > Defining Order Type Codes Procedure

... > Order Types Field Reference

Specifying Packaged Items



Packaged Items

You can use packaged items to define the containers in which bulk items will be packaged, as well as the bulk item fill quantities. You can also use packaged items to indicate package configuration on a loading pallet.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Class and

Code Setup > Defining Packaged Items

... > Defining Packaged Items Procedure

... > Packaged Items Field Reference

Designating Lockboxes

Lockboxes

You use the Lock Box window if you have customers who send payments to one or more lockboxes for your organization.

Note: If you are integrated with Oracle Financials, you establish lockboxes in Oracle Accounts Receivable.

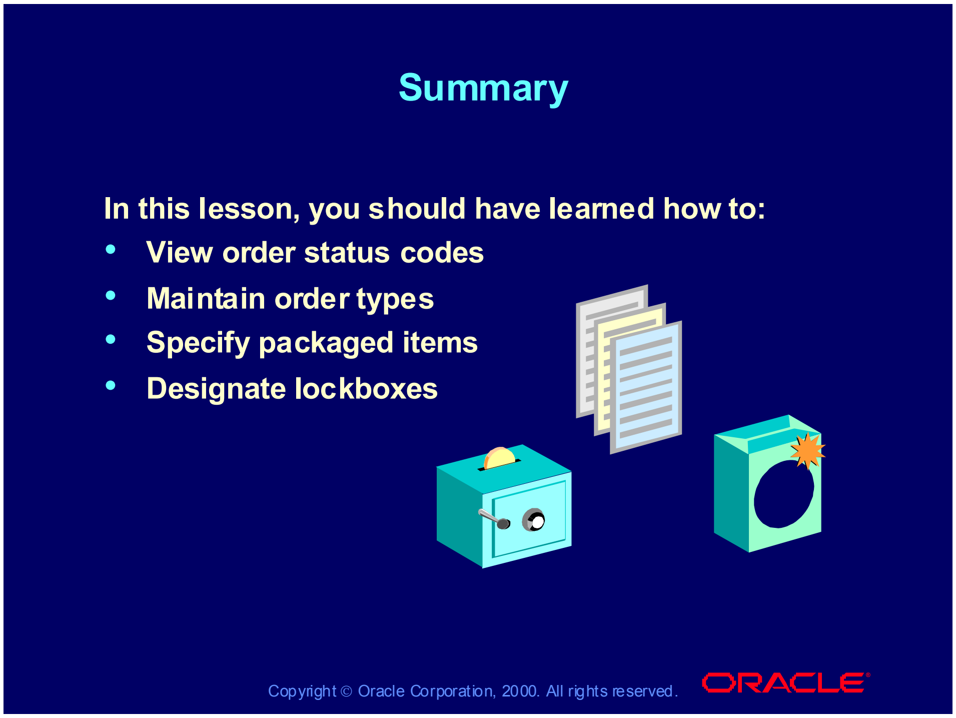
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Class and Code Setup > Defining Lock Boxes

... > Defining Lock Boxes Procedure

... > Lock Box Field Reference

... > Lock Box - Actions Menu Options

Summary


Summary
In this lesson, you should have learned how to:
• View order status codes
• Maintain order types
• Specify packaged items
• Designate lockboxes
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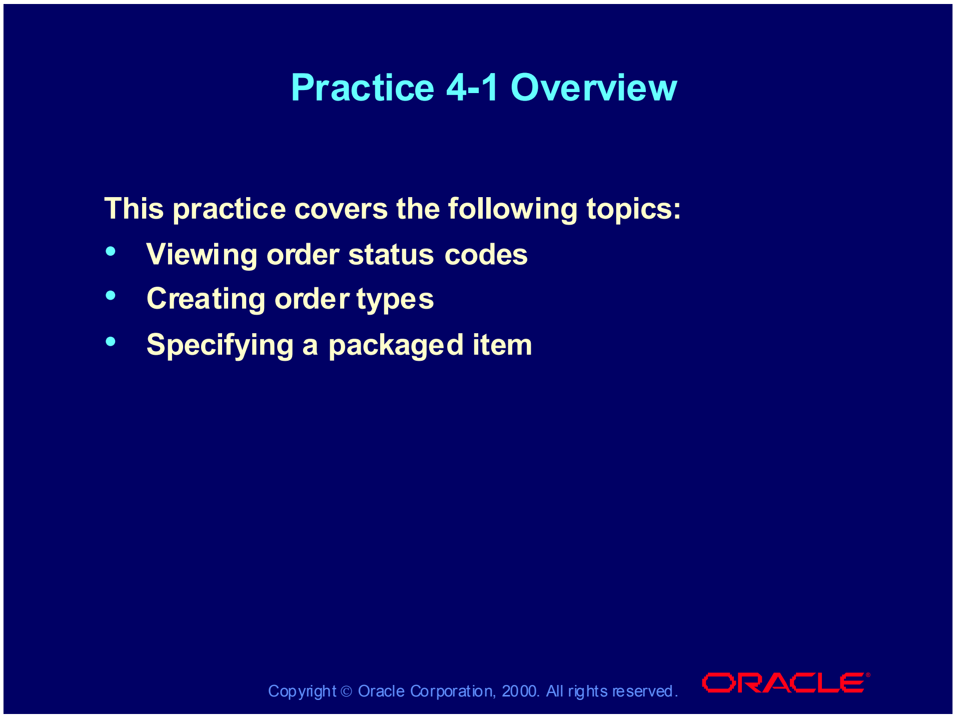
Practice 4-1 Overview



Scenario

In this exercise, you will familiarize yourself with the predefined order status codes that indicate the processing stages for a sales order. In addition, you will create different order types that will enable you and OPM to determine the internal processing functions that will occur with a particular sales order associated with a specific type.

Step 1: Viewing Order Status Codes

To familiarize yourself with the predefined order status codes that indicate the processing stages for a sales order, use the Find Order Status window.

Step 2: Creating Order Types

1. Create four different order types called *XX*OT1, *XX*OT2, *XX*OT3, and *XX*OT4.

   XX represents the two letters assigned by your instructor.

2. Enter a description of the order type that you are adding.
3. Specify the number of lead time days that orders of this type would generally require to process the order, or leave the default of 0.

Scenario (continued)

4. Indicate the type of inventory transactions that will be generated for orders of this type as follows:

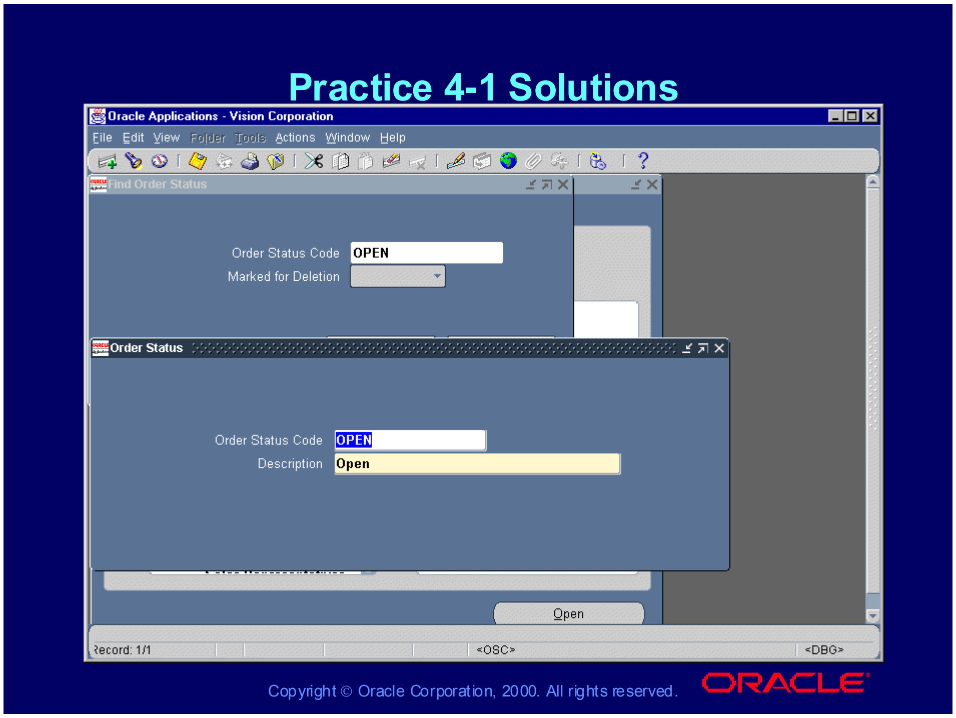
Order Type	Inventory Transaction Type
*XX*OT1	Normal
*XX*OT2	Interplant
*XX*OT3	Consignment
*XX*OT4	Normal

5. Select Order Line Pricing for the order type *XX*OT1.
6. Select Order Total Pricing for the order type *XX*OT4.
7. Save each order type.

Step 3: Specifying a Packaged Item

1. Define a container in which bulk items will be packaged, using the Packaged Items window.
2. Enter a code to define your new package. Begin the code with the two letters assigned by your instructor.
3. Enter an appropriate description for your new package.
4. Enter the appropriate item, per package, tare, and pallet information.
5. Save the packaged item.

Practice 4-1 Solutions



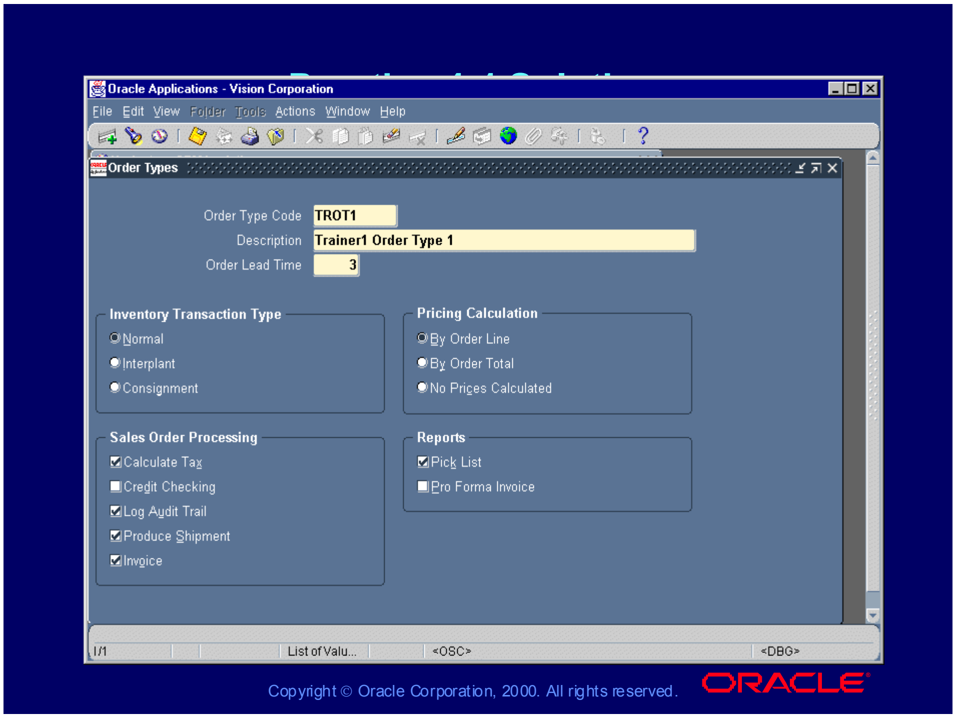
Viewing Order Status Codes

1. Navigate to the Order Status window.

   (N) OPM Logistics > Order Fulfillment > Setup > Classes/Codes > Order Status

2. Select a code for the order status that you want to view from the list of values, and click the Find button.

Practice 4-1 Solutions



Creating Order Types

1. Navigate to the Order Types window.

   (N) OPM Logistics > Order Fulfillment > Setup > Classes/Codes > Order Types.

2. Create four different order types called *XX*OT1, *XX*OT2, *XX*OT3, and *XX*OT4.

   XX represents the two letters assigned by your instructor.

3. Enter a description of the order type that you are adding.

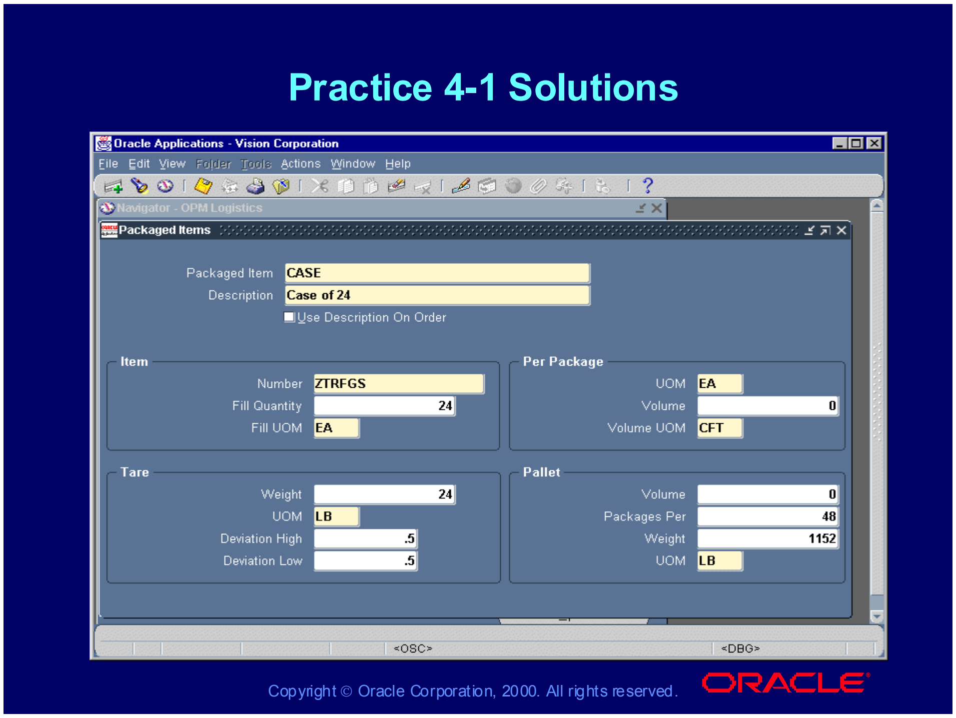
4. Specify the number of lead time days that orders of this type would generally require to process the order, or leave the default of 0.

5. Indicate the type of inventory transactions that will be generated for orders of this type as follows:

Order Type	Inventory Transaction Type
*XX*OT1	Normal
*XX*OT2	Interplant
*XX*OT3	Consignment
*XX*OT4	Normal

Creating Order Types (continued)

6. Select Order Line Pricing for the order type *XX*OT1.
7. Select Order Total Pricing for the order type *XX*OT4.
8. Save each order type.



Specifying a Packaged Item

1. Navigate to the Packaged Items window.

   (N) OPM Logistics > Order Fulfillment > Setup > Classes/Codes > Packaged Items
2. Enter a code to define your new package. Begin the code with the two letters assigned by your instructor.
3. Enter an appropriate description for your new package.
4. Enter the item information by selecting a valid bulk item from the list of values and entering the quantity of the bulk item that will be included in the package container.
5. Enter the UOM by which the package will be measured and the volume of the package container.
6. Enter the weight of the package container and the deviation percentage over and under the normal tare weight that is acceptable for this packaged item.
7. Enter the total volume of the pallet, the number of packages that would normally be loaded onto a pallet, and the weight of the loading pallet.
8. Save the record.

Managing Order Pricing

Chapter 5


5
Managing Order Pricing
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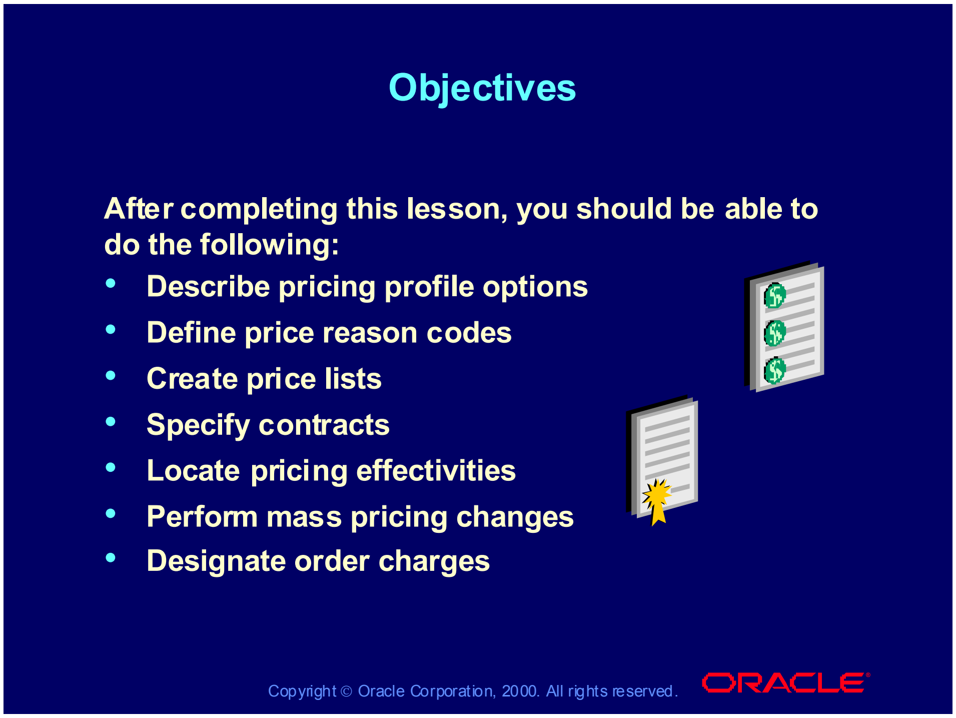
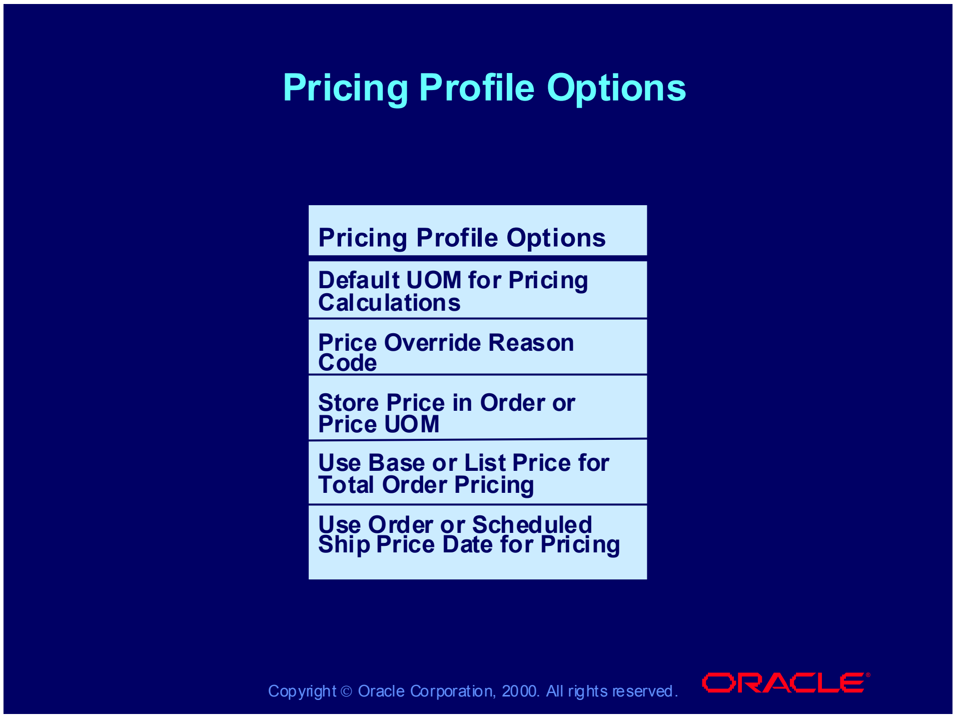
Objectives



Lesson Topics

This lesson describes pricing setups, such as defining price reason codes and order charges, and the creation of price lists and contracts that define the pricing parameters in effect for an item. You will learn how to create pricing effectivities and perform mass pricing changes.

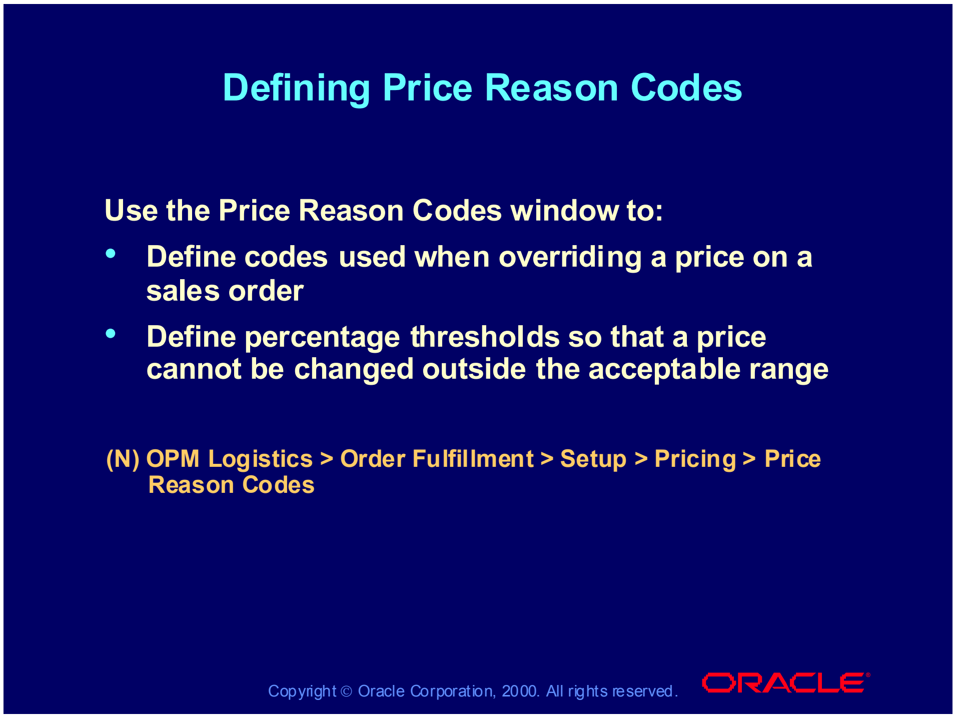
Pricing Profile Options



Pricing Profile Options

Profile Option	Description	Default Profile Values
Default UOM for Pricing Calculations	Default unit of measure for calculating total order quantity for pricing	KG
Price Override Reason Code	Controls which override reason code will be the default	N/A
Store Price in Order or Price UOM	Controls whether net price is calculated in the order unit of measure or the price list unit of measure	0 = Maintain unit price on the order in order unit of measure 1 = Maintain unit price on the order in price list unit of measure
Use Base or List Price for Total Order Pricing	Controls use of base or list price during calculation of total order value	0 = Compute order or line value using base price 1 = Compute order or line value using list price
Use Order or Scheduled Ship Price Date for Pricing	Date that controls pricing	0 = Use order date from order header 1 = Use scheduled ship date from order line item

Defining Price Reason Codes



Price Reason Codes

During order entry, if you override a price generated by Oracle Process Manufacturing (OPM) pricing, you must enter a valid reason code as authorization. When defining reason codes, you may also define price differential thresholds (high and low). These percentage thresholds enable you to establish an acceptable range of price differential. OPM does not accept an override price outside the acceptable range.

Note: When you enter a sales order, you must know the price reason code you need to use, because the list of values is not available.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Pricing Setup > Defining Price Reason Codes and Thresholds

... > Defining Price Reason Codes and Thresholds Procedure

... > Price Reason Codes Field Reference

Creating Price Lists

Price Lists

You can use a price list to define the pricing parameters in effect for an item or a group of items identified by a price class.

When allowing quantity and order value breaks, you can maintain price lists to price by:

- Individual item
- Item class
- Warehouse
- Item QC grade
- Freight bill method

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Pricing Setup > Defining Price Lists

... > Defining Price Lists Procedure

... > Price Lists - Actions Menu Options

Stipulating Price Effectivities

Stipulating Price Effectivities

Use the Price Effectivities window to define an effectivity for a price list.

(N) OPM Logistics > Order Fulfillment > Setup > Pricing > Price Lists (T) Effectivities (M) Actions > Add Effectivities

Price Effectivities

OPM uses effectivities to determine which price list to use for order pricing for customers or groups of customers. You can define an effectivity for all organizations in your enterprise or restrict it to a single organization. You can also restrict the effectivity to a single customer or make it available to all customers.

In trying to locate an automatic price to apply to a sales order, the system selects the most specific first:

- Specific organization, specific customer
- Specific organization customer class
- Specific organization territory
- Specific organization, all customers
- All organizations, specific customer
- All organizations, all customers

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Pricing Setup > Defining Price Lists

... > Defining Price Lists Procedure

... > Price Lists - Actions Menu Options

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Specifying Contracts

Contracts

Contracts are similar to price lists in that they define the pricing parameters in effect for items or groups of items identified by item price classes, but they are valid for only one customer. Contracts supersede price lists when OPM automatically selects the price.

OPM uses effectivities to determine which contract charges to use for order pricing for customers or groups of customers. You can define an effectivity for all organizations in your enterprise or restrict it to a single organization.

In trying to locate an automatic charge to apply to a sales order, the system selects the most specific first, following the same order as for price lists.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Pricing Setup > Defining Contracts

... > Defining Contracts Procedure

... > Contracts Field Reference

... > Contracts - Actions Menu Options

Locating Pricing Effectivities

Effectivities Search

You can locate effectivities established for all organizations or for a single organization.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Pricing Setup > Searching Effectivities

... > Searching Effectivities Procedure

... > Effectivities Search Field Reference

Performing Mass Pricing Changes

Performing Mass Pricing Changes

Use the Mass Price Change window to make a price change:

- **Based on a percentage of the base or break price of an item**
- **Specifying a monetary value to be added or subtracted from the base or break price**

(N) OPM Logistics > Order Fulfillment > Setup > Pricing > Mass Change

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Mass Price Change

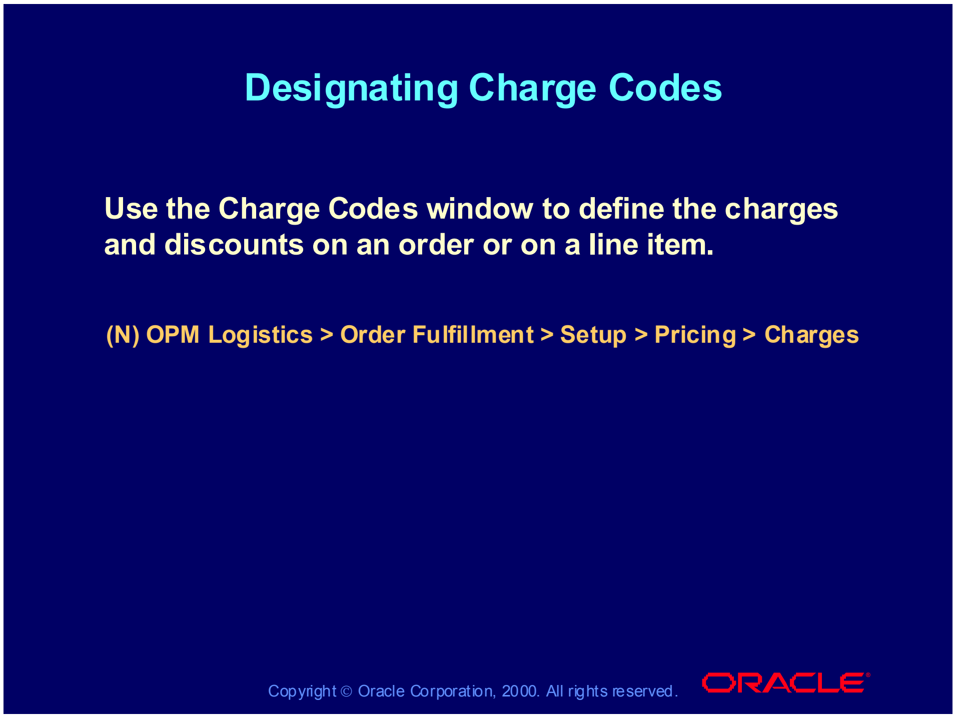
In OPM Order Fulfillment you can perform mass price list changes if you must raise or lower prices on all items for a price list or contract. You can make the price change based on a percentage of the base or break price of an item, or specify a monetary value to be added to or subtracted from the base or break price.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Pricing Setup > Entering Mass Price Changes

... > Entering Mass Price Changes Procedure

... > Mass Price Change Field Reference

Designating Charge Codes



Charge Codes

You can define the charges and discounts on a per-order basis or a line item basis. Charges and discounts are applied based on the effectivities that you specify or can be entered manually.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Pricing Setup > Defining Contracts

... > Defining Order Charges Procedure

... > Charge Codes Field Reference

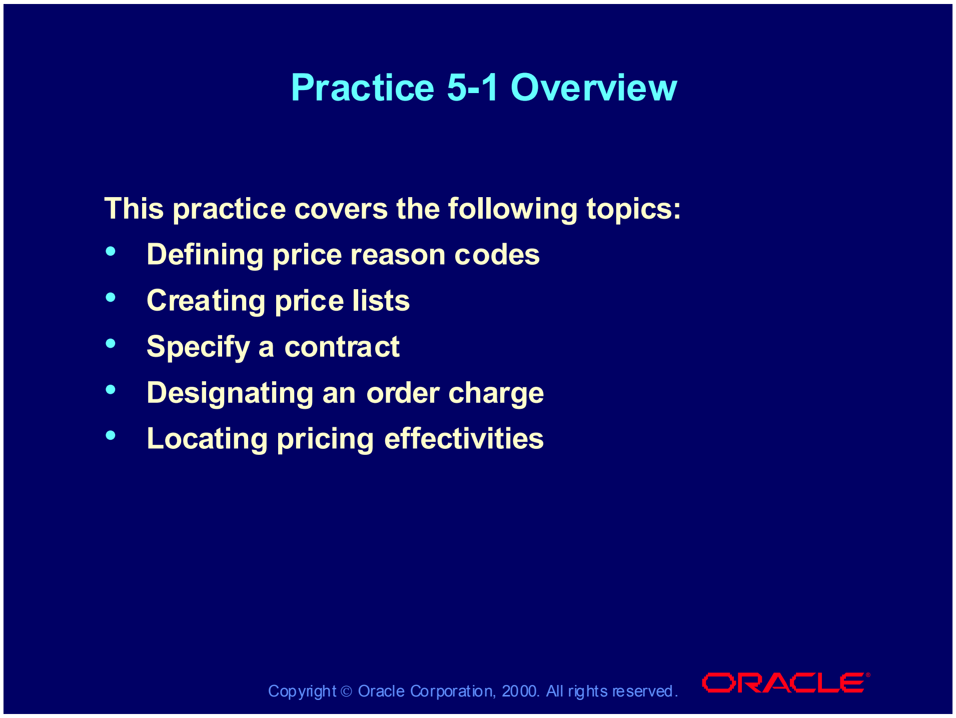
... > Charge Codes - Actions Menu Options

Summary

In this lesson, you should have learned how to:

- Describe pricing profile values
- Define price reason codes
- Create price lists
- Specify contracts
- Locate pricing effectivities
- Perform mass pricing changes
- Designate order charges

Practice 5-1 Overview



Scenario

During order entry, you will sometimes want to override a price generated by OPM pricing. You will be required to enter a valid reason code as authorization. In this exercise, you will create some of these codes. Your next task is to create two price lists. The effectivities for these price lists should be for your assigned customers.

Because your company's sales organization plans on being extremely amenable to long-term sales contracts, you will set up a contract that will override the pricing you determine in your price lists.

Step 1: Defining Price Reason Codes

1. In the Price Reason Codes window, specify two reason codes, *XX*R1 and *XX*R2. *XX* represents the two letters assigned by your instructor.
2. Enter a description for each of the two reason codes.
3. Specify the percentage of differential above the OPM-generated price that will be accepted on a price override and the percentage of differential below the OPM-generated price.
4. Save the price reason codes.

Scenario (continued)

5. Record your information below.

Price Reason Code	Description	High Tolerance	Low Tolerance
*XX*R1			
*XX*R2			

Step 2: Creating Price Lists

1. In the Price Lists window, create a price list. Name this price list *XX*PL1. *XX* represents the two letters assigned by your instructor.
2. Enter a brief description for your price list.
3. Specify USD as the currency.
4. Enter brief comments.

Enter price details for each of your three finished good items, using various types of breaks and pricing. Record the information you enter in the tables below.

	Price List	Item	Base Price	Breaks For	Breaks As
1.					
2.					
3.					

	Item 1 Quantity/Value	Unit Price/Change
1.		
2.		
3.		

	Item 2 Quantity/Value	Unit Price/Change
1.		
2.		
3.		

	Item 3 Quantity/Value	Unit Price/Change
1.		
2.		
3.		

Scenario (continued)

6. Add price effectivities for this price list. Make the price effective for one of your assigned customers. Record your information in the table below.

Price List	Organization	Customer	Start Date	End Date

a.

b.

7. Save your price list.
8. Repeat steps 1 through 7 to create a second price list called *XX* PL2. *XX* represents the two letters assigned by your instructor. You may use the same items as your first price list, but be sure to use different pricing details. Record the information for your second price list in the tables.

Step 3: Specifying Contracts

1. In the Contracts window, create a contract called *XX* C1. *XX* represents the two letters assigned by your instructor.
2. Enter a long and short description of your contract.
3. Specify USD as the currency on which pricing for your contract is based, and the currency exchange rate.
4. Specify how to calculate the exchange rate.
5. Record your information in the table below.

Contract #	Long Descr.	Short Descr.	Currency	Exchange Rate	Multiply/Divide

6. Enter effectivities for this contract. Select One to restrict the effectivity to a single organization.
7. Enter one of your customers to whom the effectivity applies.
8. Enter a preference of `99`.
9. From the Contracts window, select Contract Details.
10. Select Item and enter one of your items to link to the contract.
11. Enter the base price per unit for the item.
12. Select a quantity price break.
13. In the Price Breaks Entered As field, select Unit Price. Record your information in the table below.

Item	Description	Base Price	Breaks For	Breaks As

a.

b.

c.

Scenario (continued)

14. Enter the quantities and unit prices to associate with this contract.
    Record your information in the table below.

Quantity	Unit Price

a.

b.

c.

d.

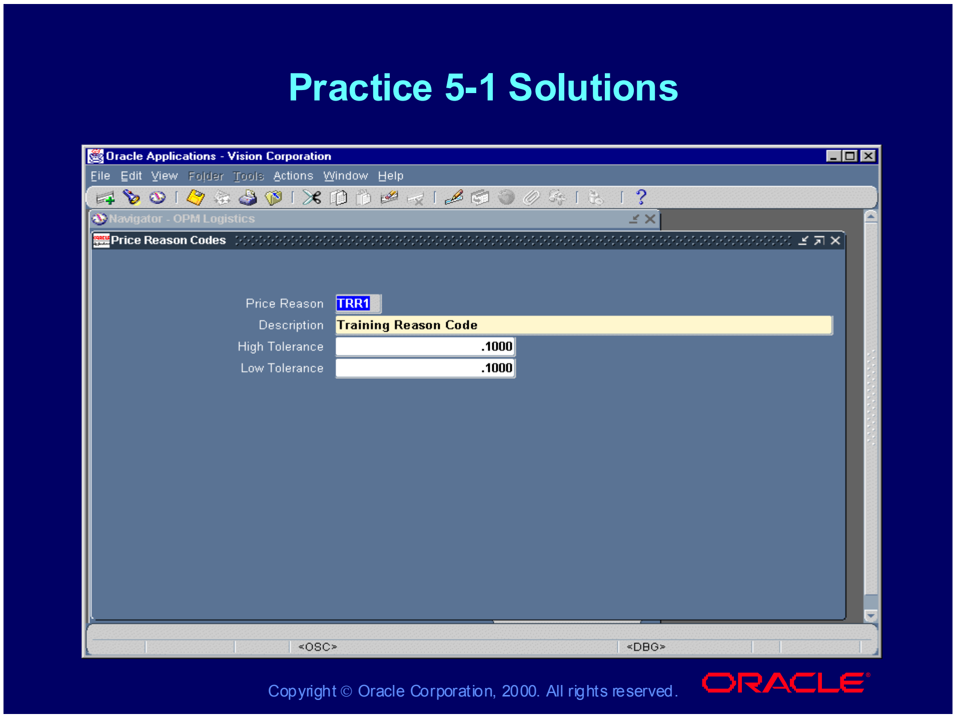
15. Return to the Contracts window and save the contract.

Step 4: Designating Order Charges

1. In the Charge Codes window, enter a charge code called *XX*CHARGE.
    XX represents the two letters assigned by your instructor.
2. Enter a description of the charge that you are adding.
3. Designate the charge type as Freight.
4. Indicate USD as the currency on which this charge is based or select it from the list of values.
5. Assign this charge to be passed on to customers.
6. Base the freight charge on the total order and indicate that the charge is a flat charge.
7. Indicate the UOM for which the flat amount is charged.
8. Establish effectivities for your freight charge. Make the charge applicable to all organizations, and enter effective dates for this charge and a preference to be used when more than one charge effectivity lines share the same parameters.
9. Save your order charge.

Step 5: Locating Pricing Effectivities

1. Using the Effectivities Search window, locate the effectivities that you have set up. Limit this search to one of your customers.
2. Repeat this process to search for effectivities that you set up for all of your organizations.

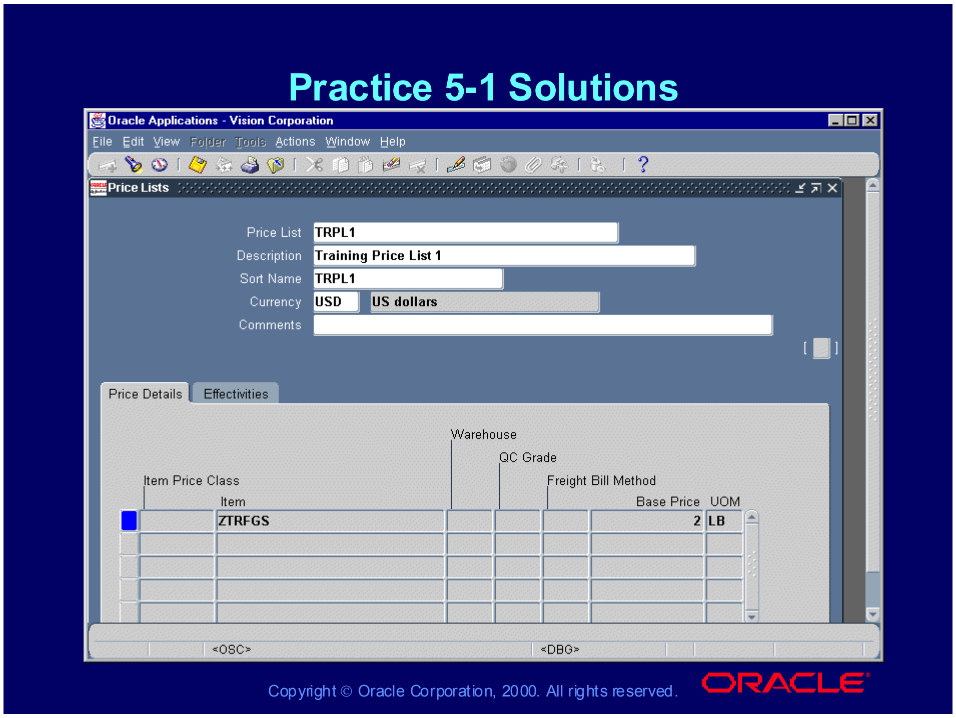


Defining Price Reason Codes

1. Navigate to the Price Reason Codes window.

   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Price Reason Codes

2. Enter the price reason code, *XX*R1. *XX* represents the two letters assigned by your instructor.
3. Enter a description for your price reason code.
4. Enter a percentage of differential above the OPM-generated price that will be accepted on a price override.
5. Enter a percentage of differential below the OPM-generated price.
6. Select Save from the Action menu to save the price reason code.
7. Repeat steps 3 through 7 to create *XX*R2.



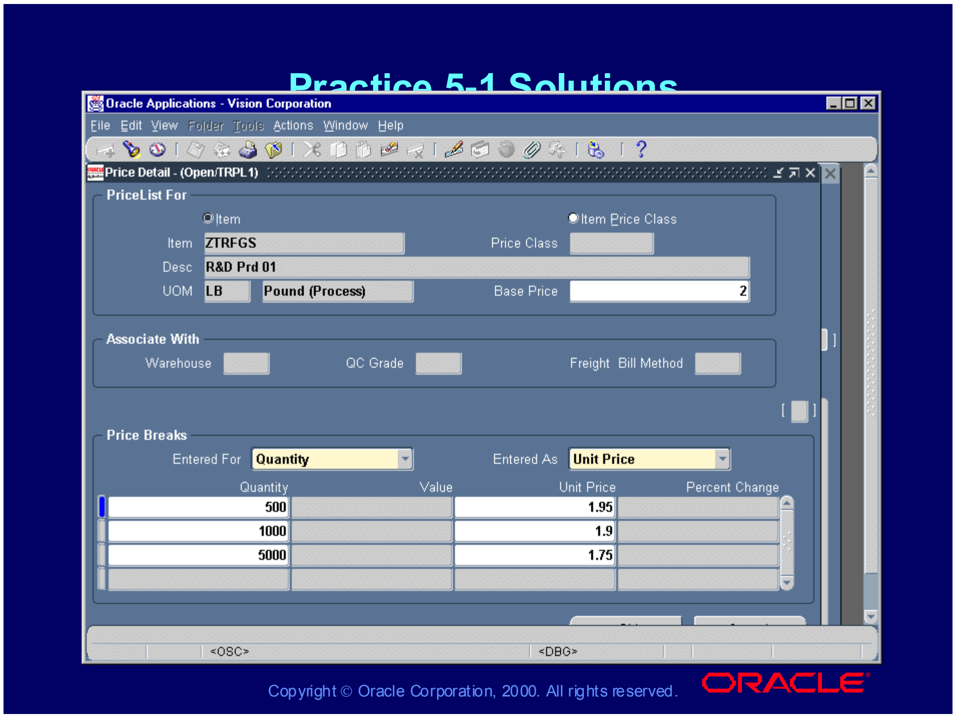
Creating Price Lists

1. Navigate to the Price Lists window.

   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Price Lists

2. Create the price list, *XX* PL1. *XX* represents the two letters assigned by your instructor.
3. Enter a brief description for your price list.
4. Edit or accept the sort description
5. Specify USD as the currency.
6. Enter a brief comment for your price list.
7. Click the box to the left of the Item Price Class field in the Price Details tabbed page. The Price Details window opens.

Practice 5-1 Solutions



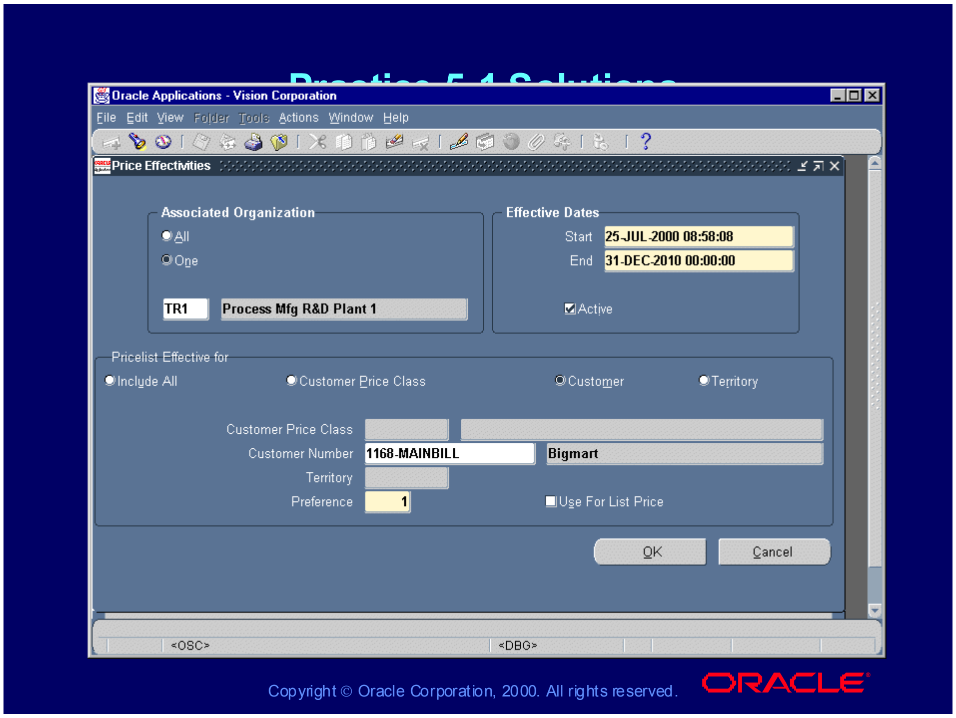
Creating Price Lists (continued)

8. Select Item to make the price list specific to a single item.
9. Select the finished good item assigned by your instructor from the list of values.
10. Enter the base price per unit for the item.
11. In the Price Breaks Entered For field, select Quantity or Value from the drop-down list.
12. In the Price Breaks Entered As field, select Unit Price, Percent Change, or Price Change from the drop-down list.
13. If you specified the break type as Quantity, indicate the sales quantity at which a change in price is triggered. If you specified Value, indicate the sales order line value that triggers a change in price.
14. Enter the new item price that replaces the base price when the associated quantity or value is reached, the percent difference from the base price, or the price difference from the base price.
15. Click the OK button to return to the Price List window.

Creating Price Lists (continued)

16. Complete steps 6 through 13 for each of your remaining finished goods. If you selected Quantity for your first finished good, select Value for your second finished good. If you selected Unit Price for your first finished good, select Percent Change for your second finished good and Price Change for your third finished good.
17. Click the OK button to return to the Price List window.

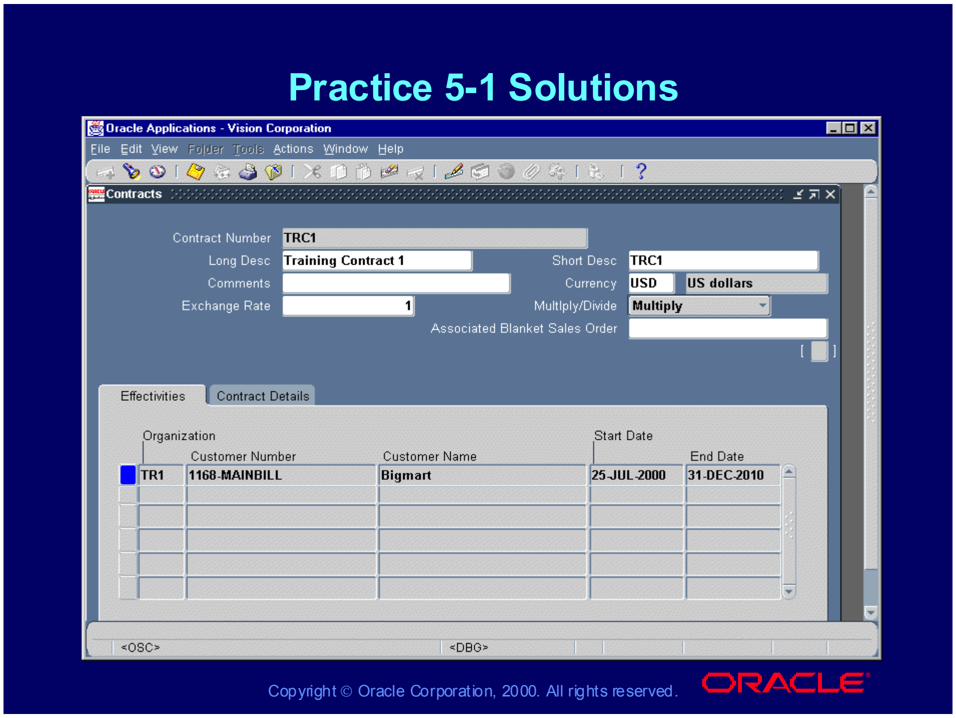
Practice 5-1 Solutions



Creating Price Lists (continued)

18. Click the Effectivities tab.
19. Click the box to the left of the Organization field of the Effectivities tab. The Price Effectivities window opens.
19. Select One in the Associated Organization region and enter your organization.
20. (Optional) You may change the effective dates or leave the default dates.
21. In the Pricelist Effective for region click the Customer option button to make this price list effective for a single customer.
22. Enter your first customer name or select it from the list of values.
23. Enter a preference number.
24. Click the OK button to return to the Price Lists window.
25. Select Save from the File menu or click the Save icon to save the price list.
26. Repeat steps 2 through 24 to create a second price list. Name this price list *XX*PL2. *XX* represents the two letters assigned by your instructor. You may use the same items as your first price list, but be sure to use different pricing details.

Practice 5-1 Solutions



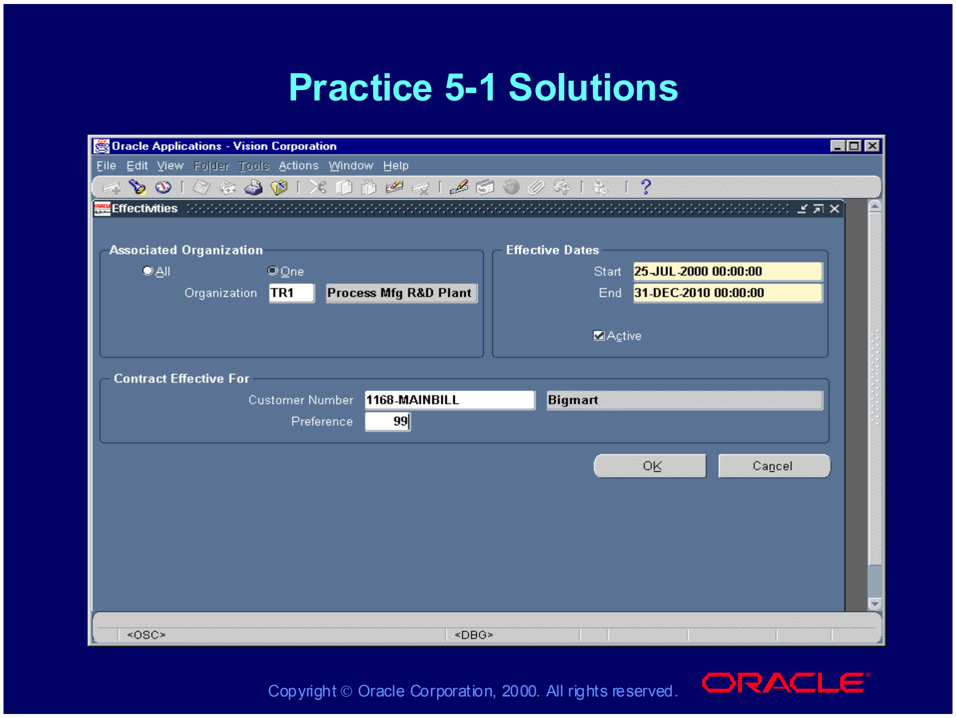
Specifying Contracts

1. Navigate to the Contracts window.

   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Contracts

2. Create a contract called *XX*C1. *XX* represents the two letters assigned by your instructor.
3. Enter a long and short description of your contract.
4. Specify USD as the currency on which pricing for your contract is based, and the currency exchange rate.
5. Specify how to calculate the exchange rate.
6. Click the box to the left of the Organization field. The Effectivities window appears.

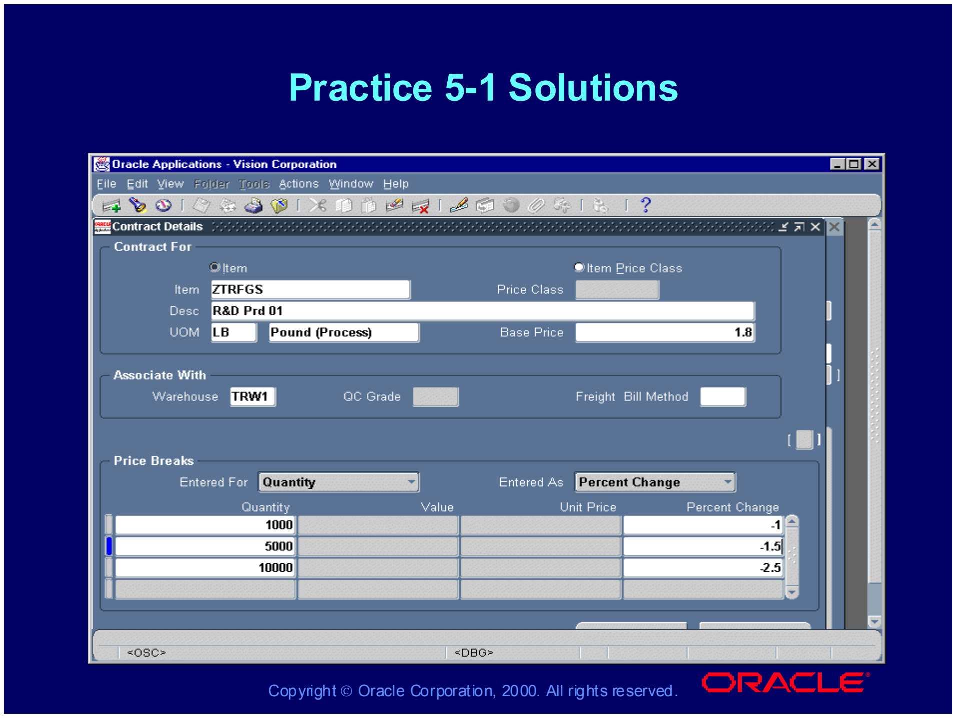
Practice 5-1 Solutions



Specifying Contracts (continued)

7. Select One in the Associated Organization region to restrict the effectivity to a single organization.
8. Enter one of your customers to whom the effectivity applies or select one from the list of values.
9. Enter a preference of `99`.
10. Click the OK button to return to the Contracts window.

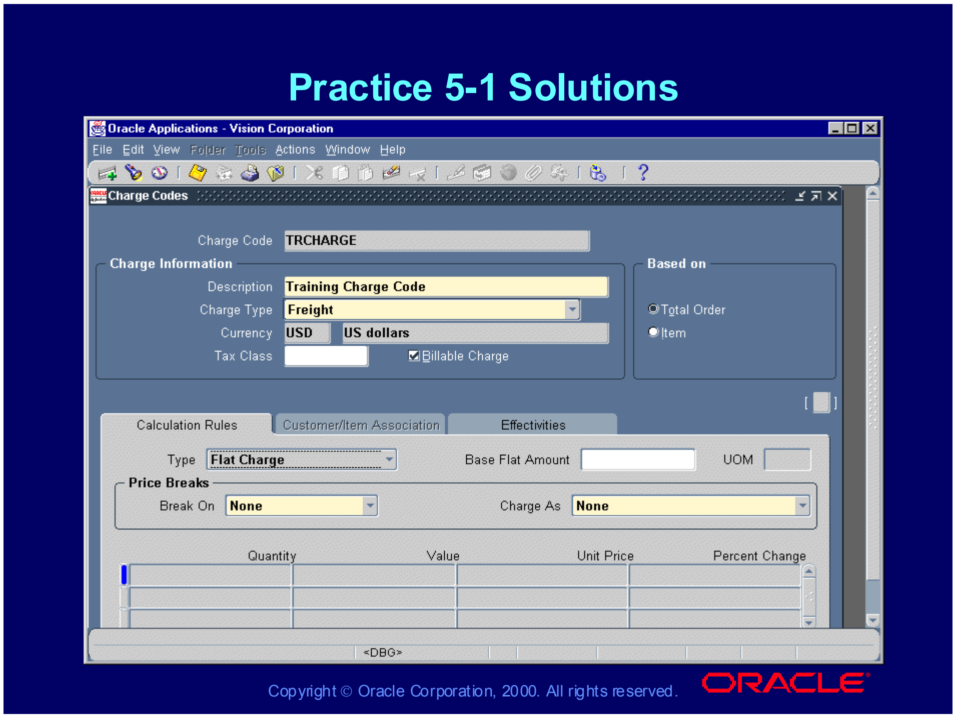
Practice 5-1 Solutions



Specifying Contracts (continued)

11. In the Contracts window, click the Contract Details tab.
12. Select Item and enter one of your items to link to the contract.
13. Enter the base price per unit for the item.
14. In the Price Breaks Entered For field, select a quantity price break.
15. In the Price Breaks Entered As field, select Unit Price.
16. Enter the quantities and unit prices to associate with this contract.
17. Return to the Contracts window and save the contract.

Practice 5-1 Solutions



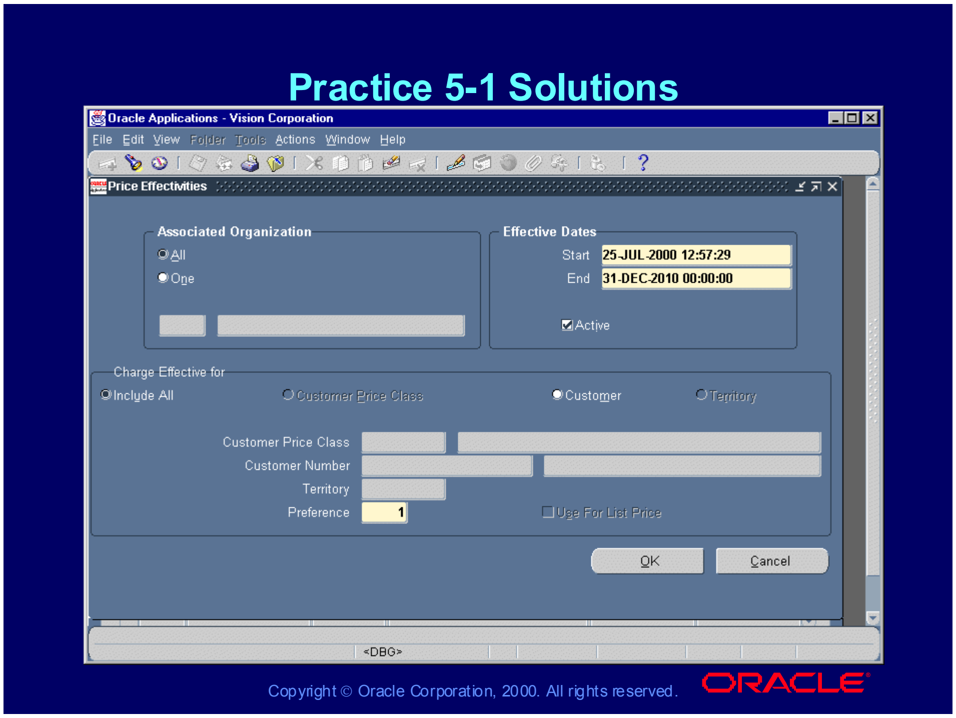
Designating Order Charges

1. Navigate to the Charge Codes window.
   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Charges
2. Enter a charge code called *XX*CHARGE. *XX* represents the two letters assigned by your instructor.
3. In the Charge Information region, enter a description of the charge you are adding.
4. From the Charge Type drop-down list, select Freight.
5. Indicate USD as the currency on which this charge is based or select it from the list of values.
6. Make sure the Billable Charge check box is selected to pass this charge on to your customers.
7. In the Based on region, select Total Order to base the freight charge on the total order.
8. In the Calculation Rules tabbed page, select Flat Charge from the drop-down list in the Type field.

Designating Order Charges (continued)

9. Establish any price breaks for order charges in the Price Breaks region, applying them in the same manner as you did on your price lists and contracts.
10. To establish effectivities for your freight charge, click the Effectivities tab.
11. Click the blue highlighted box next to the Organization field.

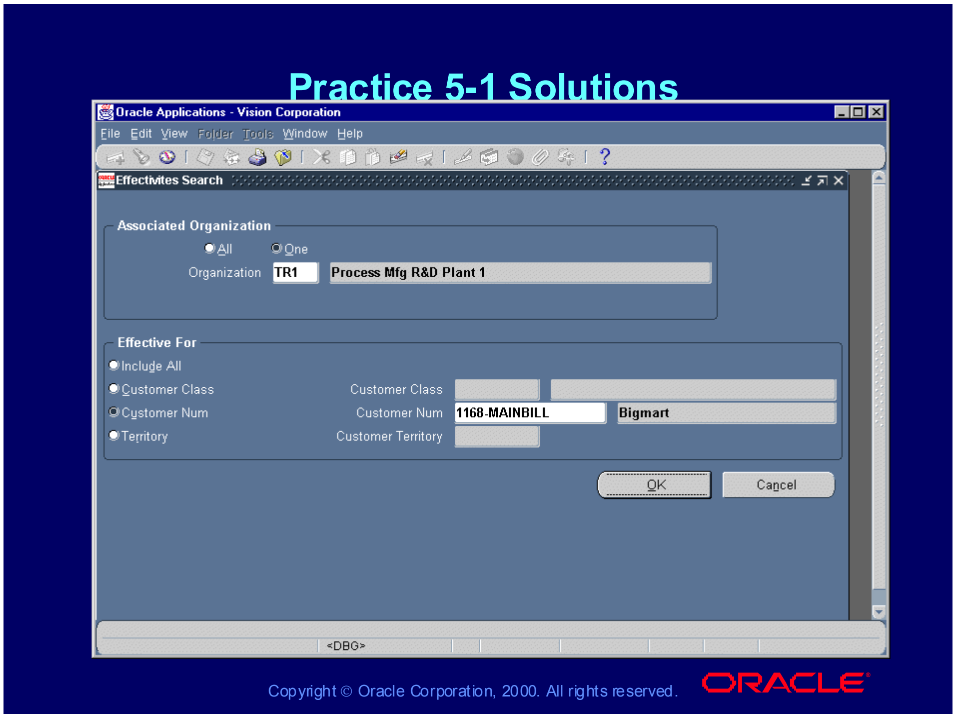
Practice 5-1 Solutions



Designating Order Charges (continued)

12. When the Price Effectivities window appears, select All to make the charge effective for all organizations.
13. Enter the dates this charge effectivity begins and ends or accept the default dates.
14. Indicate a preference number to be considered when two or more charges share the same parameters.
15. Click OK. The Charge Codes window appears.
16. Save your order charge.

Practice 5-1 Solutions



Locating Pricing Effectivities

1. Navigate to the Effectivities Search window.

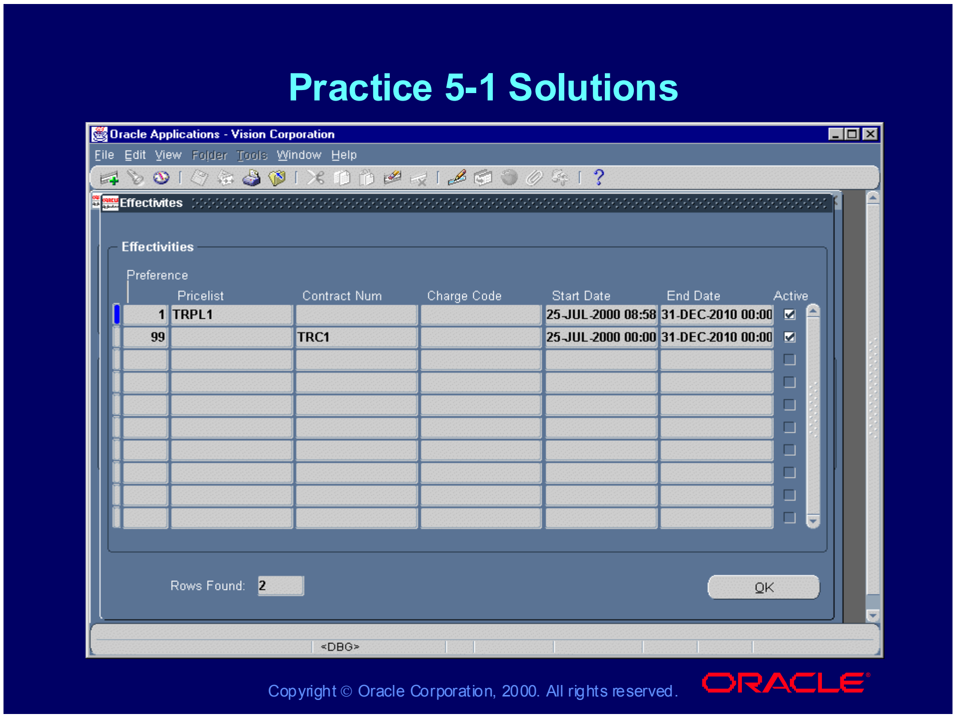
   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Effectivities Search

2. In the Associated Organization region, select the One option button to restrict the search to a single organization and specify your organization in the Organization field.

3. In the Effective For region, select Customer Num to search for a specific customer and select the customer for which you set up effectivities in the previous steps from the list of values.

4. Click the OK button.

Practice 5-1 Solutions

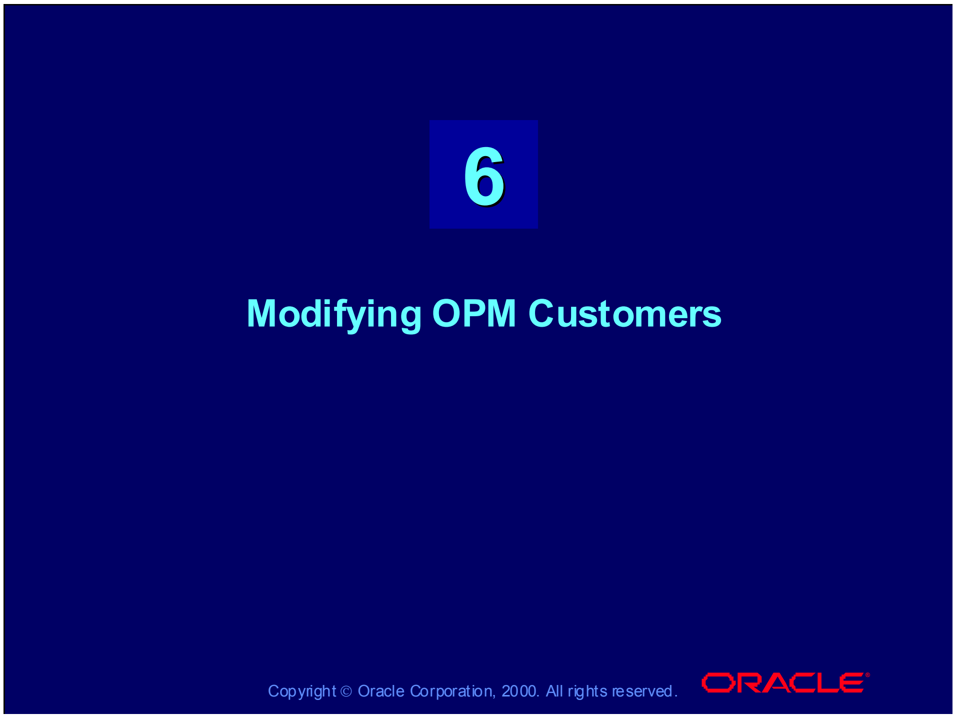


Locating Pricing Effectivities (continued)

5. The Effectivities window appears, showing the effectivities that meet the search criteria.
6. Click the OK button to return to the Effectivities Search window. Repeat this process to search for effectivities that you set up for all of your organizations.
7. In the Associated Organization region, select All.
8. In the Effective For region, select All.
9. Click the OK button.
10. The Effectivities window appears, showing the effectivities that meet the search criteria.

Modifying OPM Customers

Chapter 6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Modifying OPM Customers
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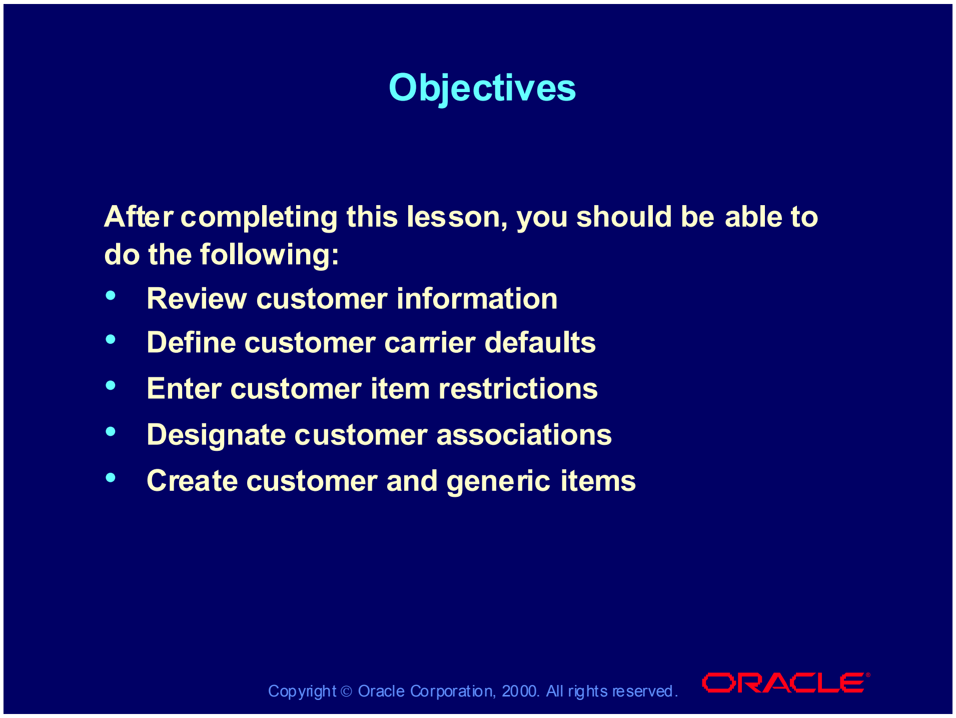
Objectives



Lesson Topics

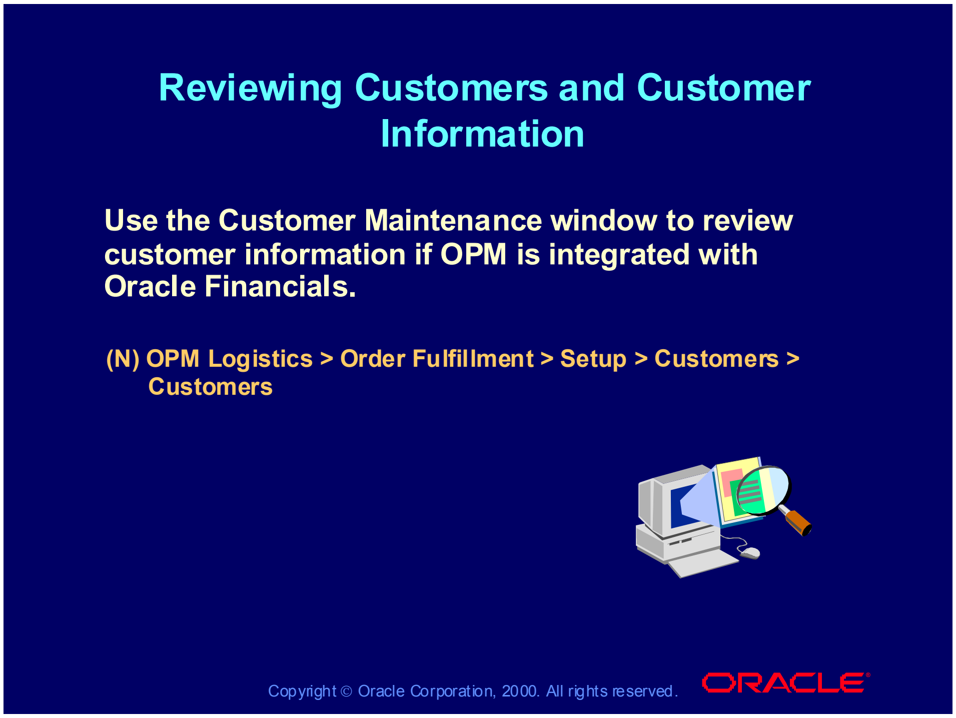
This lesson describes the maintenance features of OPM customer records. After synchronizing the customer record for Oracle Receivables you can add additional information to the customer record that applies to the OPM application. The data entered in OPM will not update the customer record in Oracle Receivables. You must designate customer associations in OPM for any bill-to and ship-to records other than the primary bill-to/ship-to relationship of a customer. Adding allocation criteria to a customer record applies to how inventory will be allocated to a customer order in OPM Order Fulfillment. Assigning additional classifications and codes enables you to identify information in OPM for reporting purposes and mapping transactions for general ledger tracking.

Objectives

Objectives

- Add allocation criteria
- Specify customer trade classes
- Define customer classes
- Establish customer price classes
- Name customer general ledger classes
- Enter customer tax exemptions

Reviewing Customers and Customer Information



Overview

If OPM is not integrated with Oracle Financials, you must establish each of your customers in OPM. You can designate each customer as a ship-to or bill-to customer and enter the corresponding address. You also use the customer maintenance form to specify default ordering, shipping, and billing information; customer-specific items; and contacts at the customer site.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Customer Setup > Defining Lock Boxes

... > Defining Customer Information Procedure

... > Customer Information Field Reference

How to Review Customers and Customer Information

1. If you are integrated with Oracle Financials, the Find Customers window appears when you select Customers from the Customer menu. Enter the company code for the company to which the customer is linked.
2. Click Find. The first customer who meets your criteria appears in the Customer Maintenance window. Press [Pg Dn] to view any additional customers who meet your criteria.

Overview (continued)

If you are integrated with Oracle Financials, you enter most of the customer information through Oracle Financials and then synchronize it to the OPM Customer table. You have access to the following fields in the Customer Maintenance window:

- Sort Name
- Alternate Customer
- Standard Point Location Code
- Descriptive Flexfields

Standard Point Location Code represents a specific location within a sales territory. This code is for freight and traffic rate management and is for your reference.

Descriptive flexfields are fields that you can define. A descriptive flexfield looks like a box within square brackets. See the *Oracle Applications Flexfields Guide* for detailed information.

You can use attachments with this form. See *Oracle Applications* for detailed information on attachments and folders.

Defining Customer Carriers

Defining Customer Carriers

Use the Customer Carriers window from the Customer Maintenance window to enter customer specific requirements for shipping items ordered.

(N) OPM Logistics > Order Fulfillment > Setup > Customers > Customers (B) Customer Carriers

Customer Carriers

You can specify which carrier or group of carriers a customer prefers to use by warehouse and for a group of items. You can also specify the order of preference of the carriers they want to use.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Entering Customer Carriers

... > Entering Customer Carriers Procedure

... > Customer Carriers Field Reference

Restricting Customer Items

Customer Items

You have the option of restricting orders from the customer to specific items through the Customer Items form. You can indicate the items that this customer will be restricted to on sales orders; restrict the customer item to ship from a specific warehouse; and specify shipping quantity tolerances that allow shipments of the item to be marked as complete if the ship quantities fall within the range you specify.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Restricting Customer Items

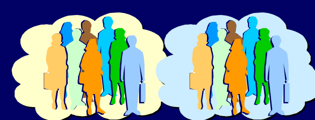
... > Restricting Customer Items Procedure

... > Customer Items Field Reference

Designating Customer Associations

Use the Customer Associations window to identify customer bill-to and ship-to locations that are linked together.

(N) OPM Logistics > Order Fulfillment > Setup > Customers > Customer Associations



Customer Associations

You can use the Customer Associations window to define the following associations:

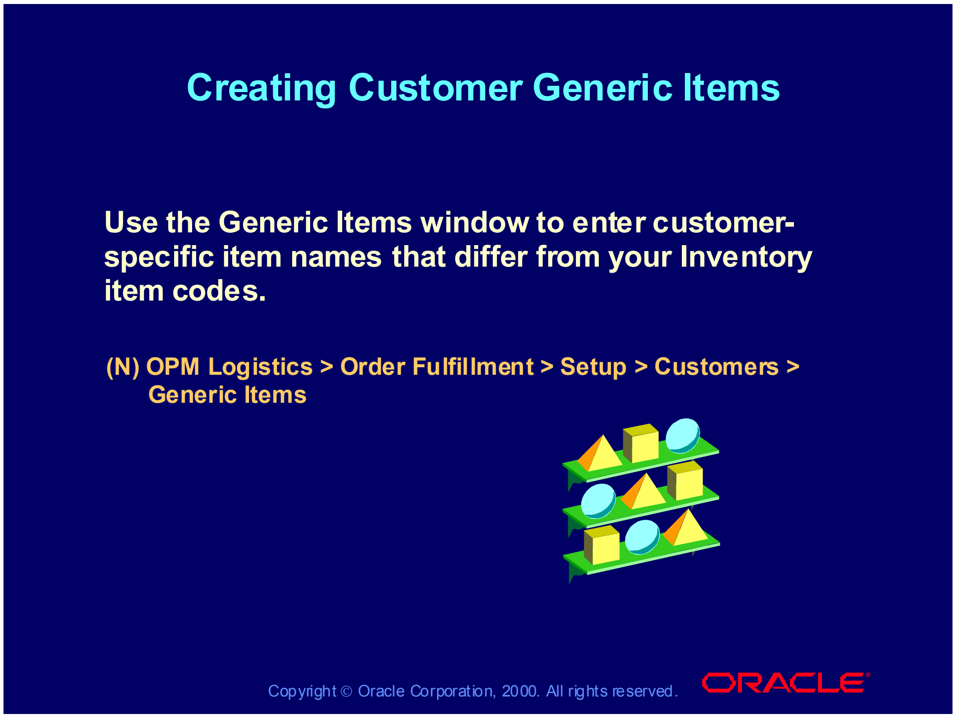
- Bill-to and ship-to customers
- Ship-to and sold-to customers
- Corporate and ship-to/bill-to customers

Note: The bill-to and ship-to customers are synchronized from Oracle Applications Accounts Receivable.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Customer Setup > Defining Customer Associations

... > Defining Customer Associations Procedure

... > Customer Associations Field Reference



Generic Items

When ordering from you, customers can reference an item by an item code that differs from the one that you established in OPM in the Items window in the Inventory module. You can create a customer-specific cross-reference between each customer item code and the Inventory item code. You can either use the customer code or define a customer-specific item code that is recognizable to both you and the customer and that cross-references the established Inventory item code.

When all customers reference the item by an item code that is different from the Inventory item code, you can create generic item codes. The generic item codes that you define cross-reference the Inventory item codes in the same manner as the customer-specific item codes. However, no customer is specified in the cross-reference, so all customers share the generic item cross-references.

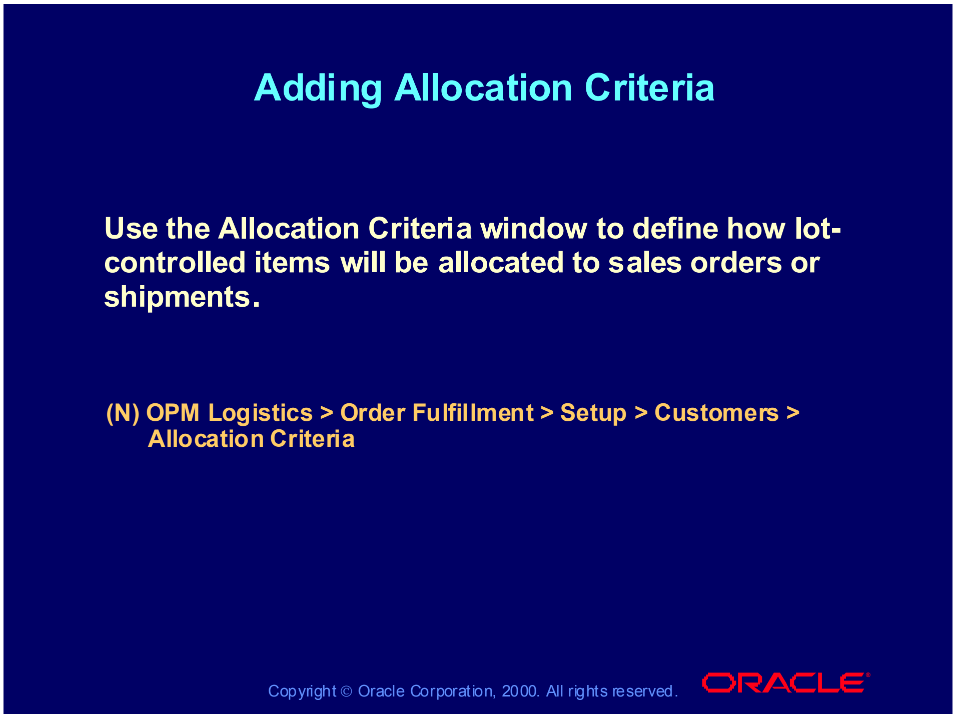
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Customer Setup > Defining Customer/Generic Items

... > Defining Customer/Generic Items Procedure

... > Customer/Generic Items Field Reference

... > Generic Items - Action Menu Options

Adding Allocation Criteria



Allocation Criteria

You use the Allocation Criteria window to automatically allocate inventory to sales orders or shipments when they are saved.

Sales allocation parameters are required for automatic allocations of inventory lots to sales orders and shipments. They can be in effect for all customers or one customer. In addition, allocation parameters indicate whether orders for an item must be filled completely or if they can be filled partially and if more than one lot can be used to fill an order.

Note: Before you can allocate lot-controlled items to sales orders or shipments, you must first group items into allocation classes in OPM Inventory. See the OPM *Inventory Management User's Guide* or online Help topics for detailed information about the Allocation Class and Items windows.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Defining Sales Order Allocation Criteria

... > Defining Sales Order Allocation Criteria Procedure

... > Allocation Criteria Field Reference

Specifying Customer Trade Classes

Customer Trade Classes

You can use trade classifications to categorize customers according to specific profiles. Any customer included in the specified trade class can be used on a sales order.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Defining Customer Trade Classes

... > Defining Customer Trade Classes Procedure

... > Customer Trade Classes Field Reference

Defining Customer Classes

Customer Classes

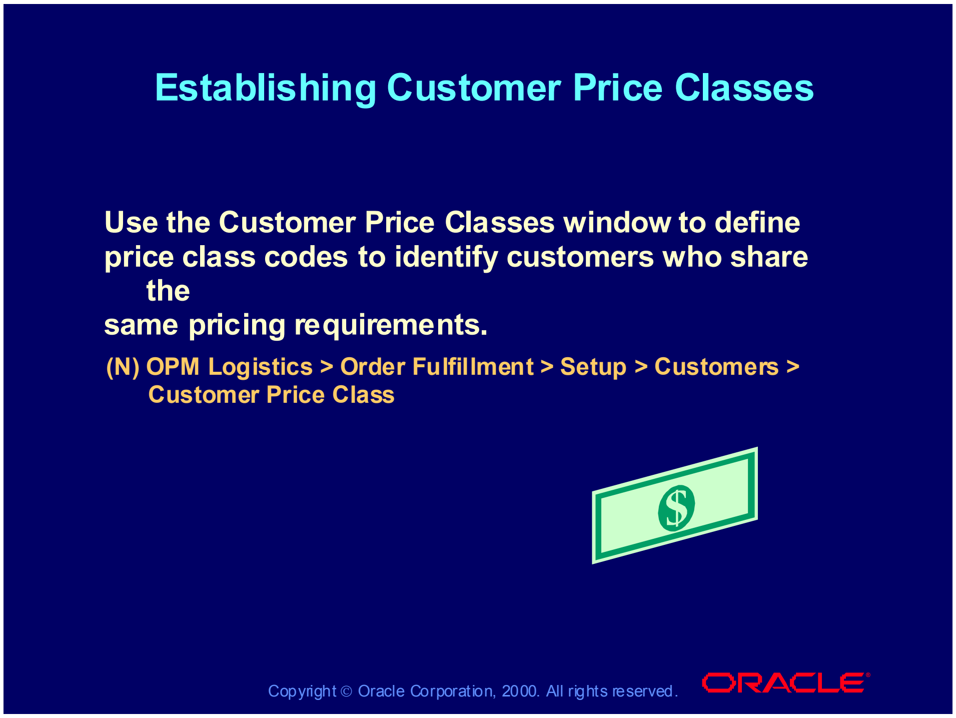
You can use customer classes to group customers with similar characteristics for reporting purposes. You define the criteria for grouping.

Note: Customer classes are not used when OPM is integrated with Oracle Financials.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Defining Customer Classes

... > Defining Customer Classes Procedure

... > Customer Classes Field Reference



Customer Price Classes

You use the customer price classes form to define customer price class codes that you use to group customers that share the same pricing information.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Defining Customer Price Classes

... > Defining Customer Price Classes Procedure

... > Customer Price Classes Field Reference

Naming Customer General Ledger Classes

Customer General Ledger Classes

You can define general ledger (GL) classifications to group customers with similar accounting characteristics. You use this class assignment with Oracle General Ledger to map sales figures to general ledger accounts.

Note: If OPM Order Fulfillment is integrated with Oracle Financials, assign GL classes to customers in Oracle Receivables. You must then run a concurrent process to save them to OPM.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Defining Customer General Ledger Classes

... > Defining Customer General Ledger Classes Procedure

... > Customer General Ledger Classes Field Reference

Entering Customer Tax Exemptions

Use the Customer Tax Exemptions window to define tax exemptions to link to tax authority codes.

(N) OPM Logistics > Order Fulfillment > Setup > Customers > Customer Tax Exempt

Customer Tax Exemptions

You might deal with customers who are exempt from taxes based on the kinds of businesses they run. These businesses are generally required to provide you with tax-exemption certification numbers to include in your federal tax reporting documents.

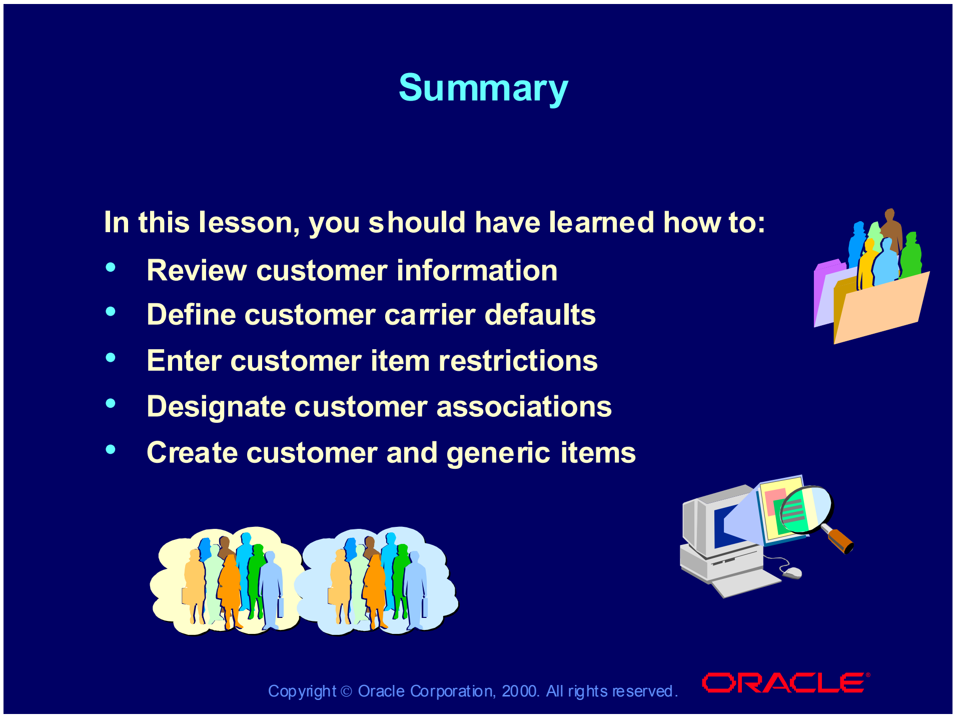
You use the Customer Tax Exemptions window to enter the appropriate exemption information for tax-exempt customers and link it to a tax authority code.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Customer Setup > Defining Tax Exemptions

... > Defining Customer Tax Exemptions Procedure

... > Customer Tax Exemptions Field Reference

Summary


Summary
In this lesson, you should have learned how to:
• Review customer information
• Define customer carrier defaults
• Enter customer item restrictions
• Designate customer associations
• Create customer and generic items
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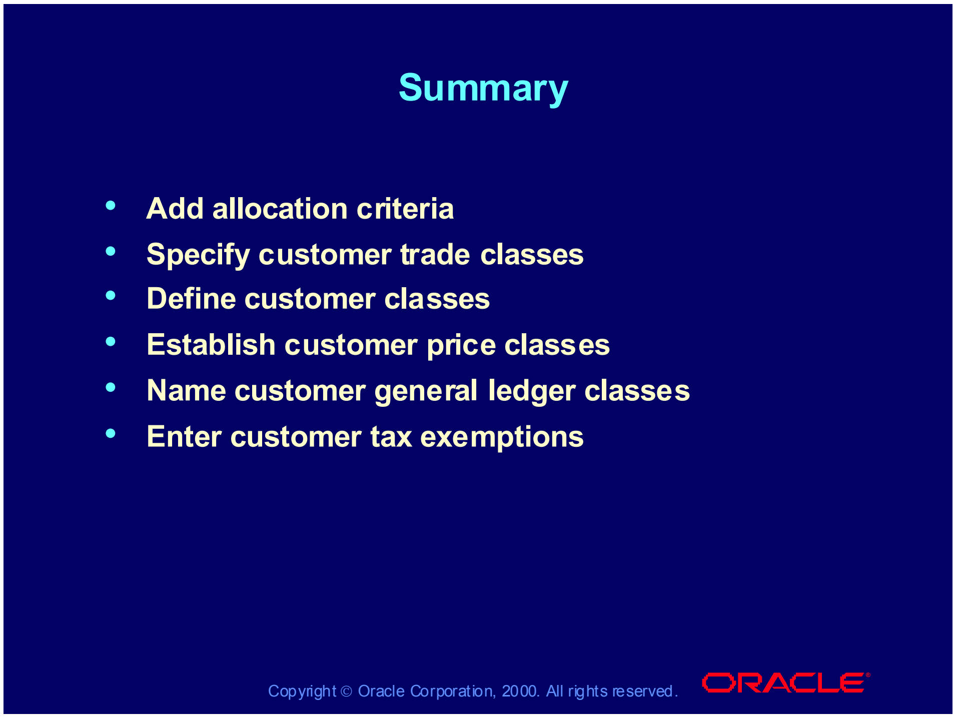
ORACLE

Summary



Summary
Add allocation criteria
Specify customer trade classes
Define customer classes
Establish customer price classes
Name customer general ledger classes
Enter customer tax exemptions
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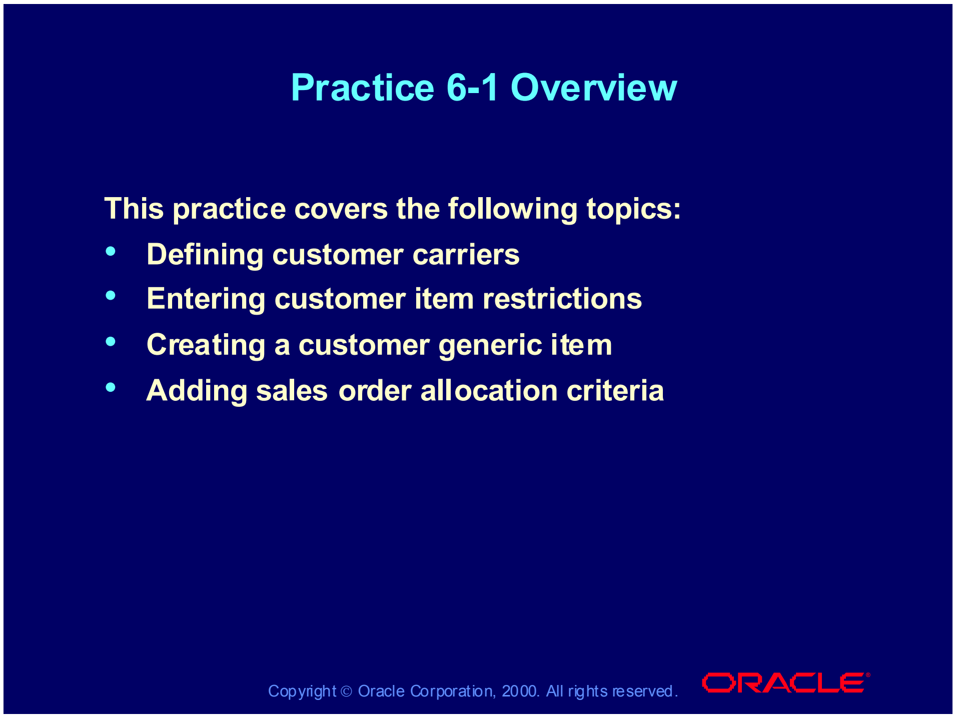
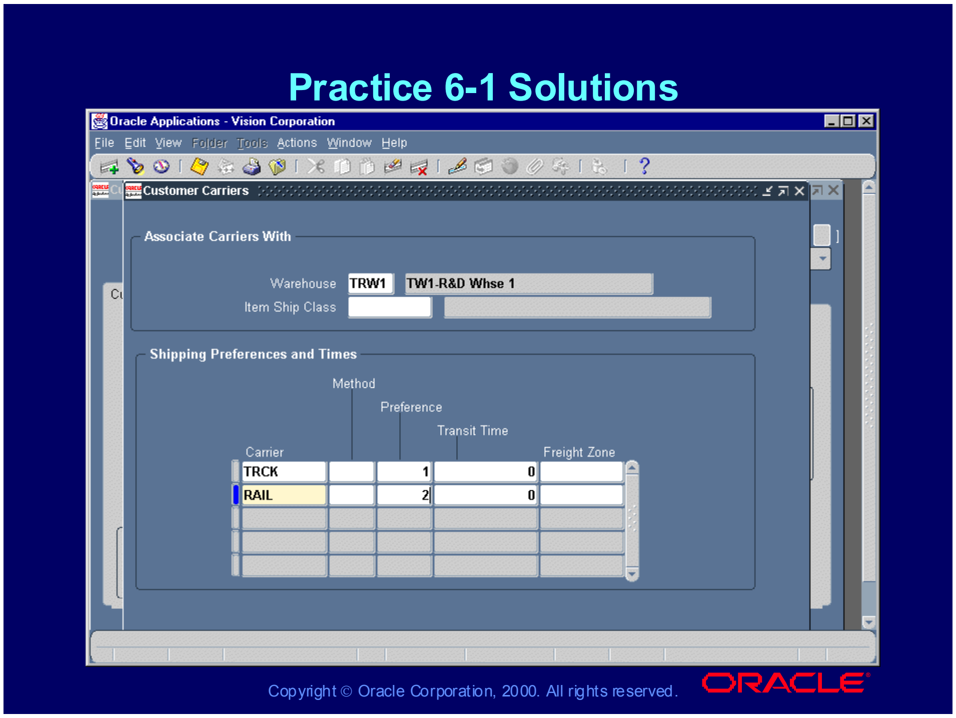
Practice 6-1 Overview



Practice 6-1 Solutions

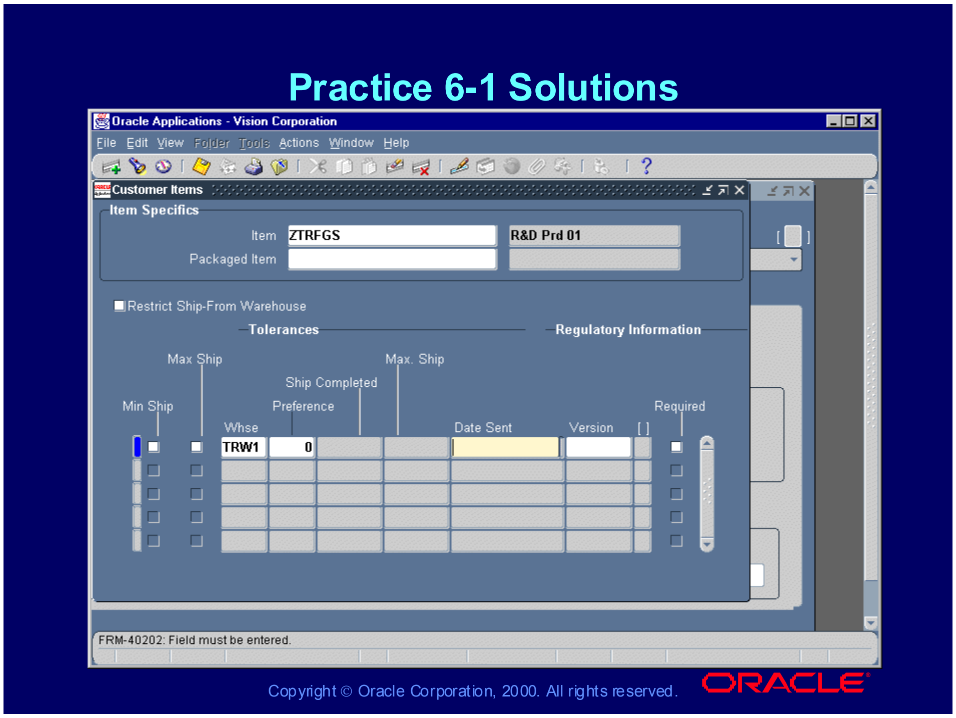


Defining Customer Carriers

1. Navigate to the Customers Carriers window.

   (N) OPM Logistics > Order Fulfillment > Setup > Customers > Customers (B) Customer Carriers
2. In the Associate Carriers With region, select from the list of values a warehouse and/or Item Ship Class for which you will define customer preferences.
3. In the Shipping Preferences and Times region, select a carrier from the list of values.
4. If there are multiple methods of transportation for this carrier, select a method from the list of values.
5. If this customer has more than one carrier defined, order the carriers by preference (1 being the highest preference).
6. Enter the number of days this carrier requires to ship the material to the warehouse in the Transit Time field (information only).
7. Enter a freight zone (information only).
8. Save your work.

Practice 6-1 Solutions



Entering Customer Item Restrictions

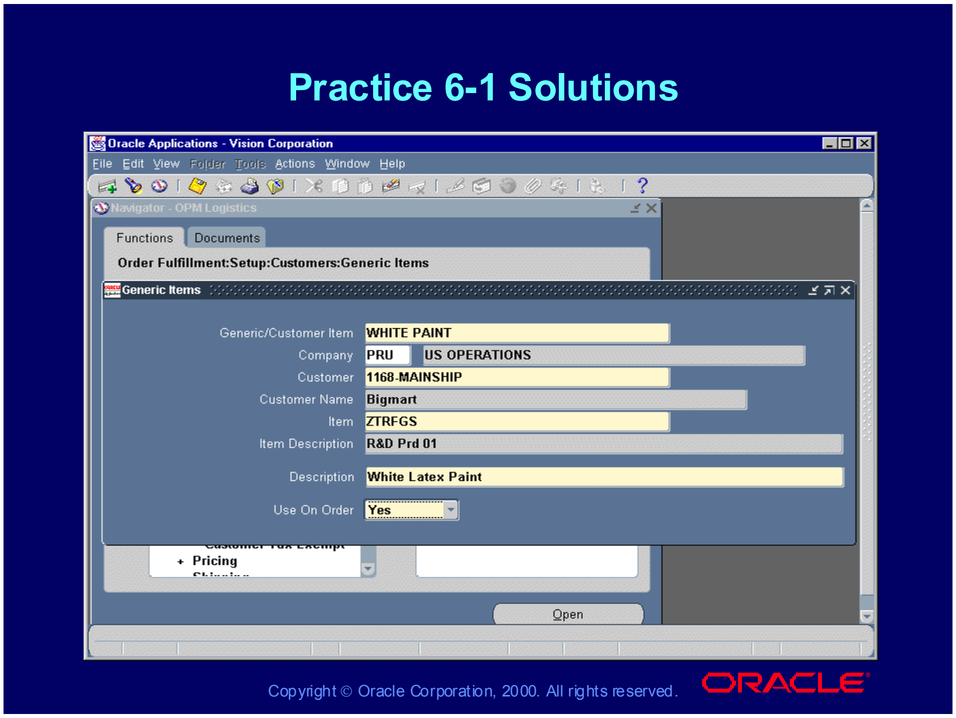
1. Navigate to the Customer Items window.

   (N) OPM Logistics > Order Fulfillment > Setup > Customers > Customers (B) Customer Items

2. In the Item Specifics region, select from the list of values an item and/or packaged item for which you will define restrictions.
3. Select the Restrict Ship-From Warehouse check box.
4. Select the Min Ship or Max Ship check boxes if you want the system to perform a check on short- or overshipment of this item.
5. Select a warehouse if this item can be shipped only from a designated location.
6. If this customer has more than one warehouse defined, order the warehouses by preference (1 being the highest preference).
7. Enter the Ship Completed percent tolerance that will allow the system to mark the shipment line as completed if the shipment quantity meets or exceeds this percentage.
8. Enter the maximum percentage over and above the ordered quantity that can be shipped.

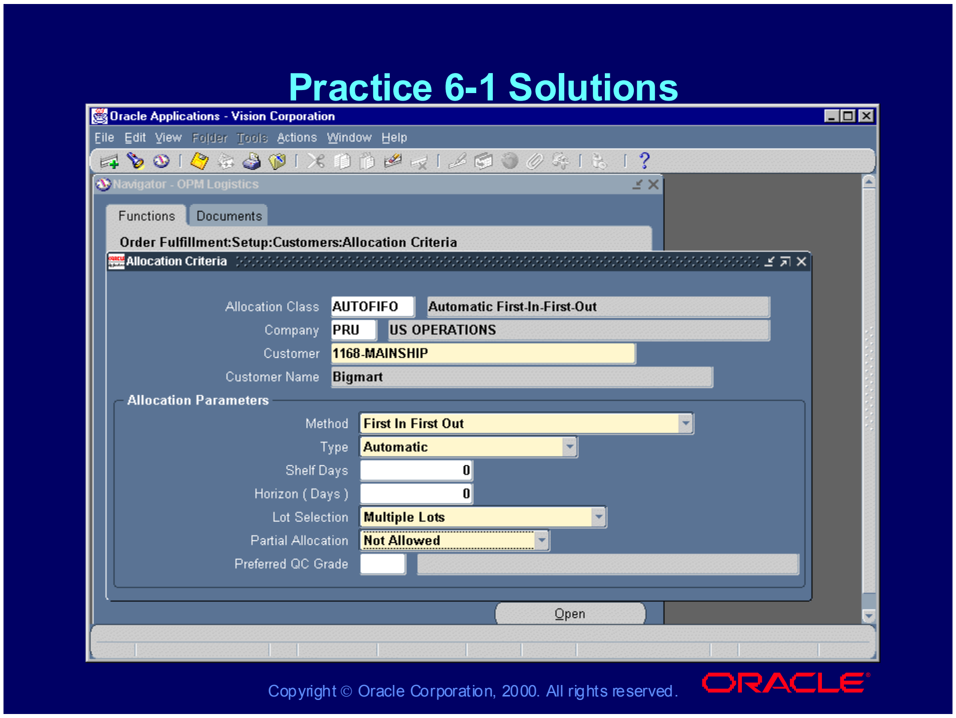
9. (Optional) Enter the date that the last Material Safety Data Sheet (MSDS) was sent to the customer.
10. Enter the version number of the last MSDS sent.
11. Select the Required check box if a regulatory document is required for the customer item when it is shipped.
12. Save your work.

Practice 6-1 Solutions



Creating a Customer Generic Item

1. Navigate to the Generic Items window.
   (N) OPM Logistics > Order Fulfillment > Setup > Customers > Generic Items
2. Enter the customer item in the Generic/Customer Item window.
3. Select the company from the list of values if you have access to more than one company.
4. Select the customer from the list of values. The customer name will automatically default in.
5. Select the Item from the list of values the generic name is being associated with. The item description will automatically default in.
6. Enter a description of the generic item.
7. Select Yes or No from the pop-up list if you want the generic item code and description on a sales order from the customer.
8. Save your work.



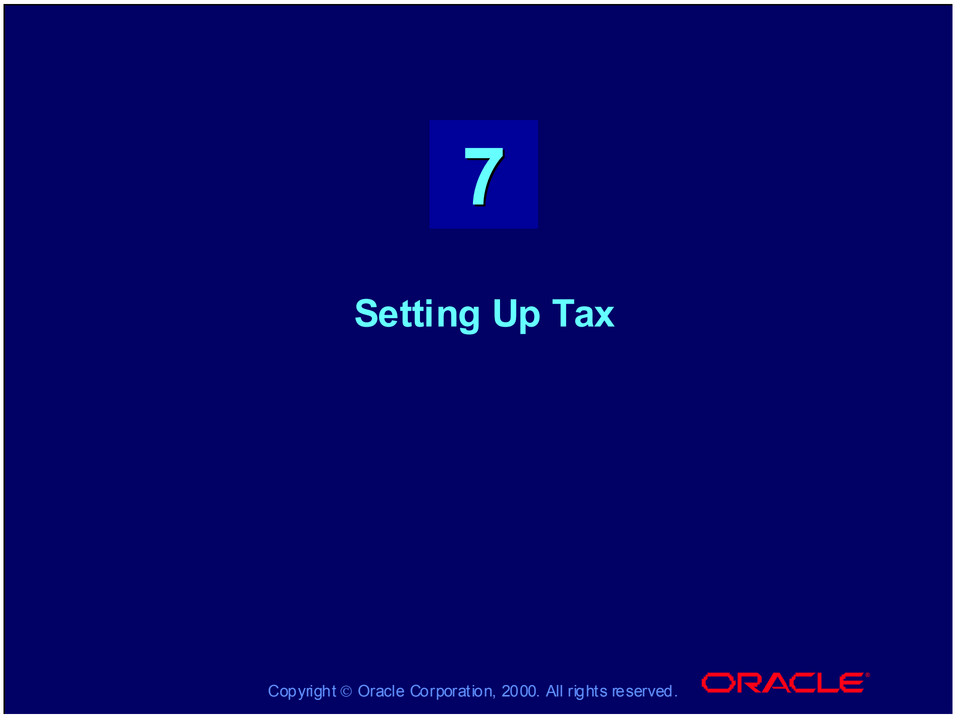
Adding Sales Order Allocation Criteria

1. Navigate to the Allocation Criteria window.

   (N) OPM Logistics > Order Fulfillment > Setup > Customers > Allocation Criteria
2. Select an allocation class from the list of values.
3. Enter your company code.
4. Select a customer from the list of values.
5. In the Allocation Parameters region, select the automatic method used to allocate lots of inventory for orders from the drop-down list.
6. Select the allocation type for this allocation class from the drop-down list.
7. Enter shelf days and horizon days if shelf life consideration applies.
8. Select the lot selection that should be used from the drop-down list.
9. Indicate whether partial allocation is allowed by selecting one of the options from the drop-down list.
10. Enter the QC grade of the item that the customer prefers to receive.
11. Save the record.

Setting Up Tax

Chapter 7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Setting Up Tax
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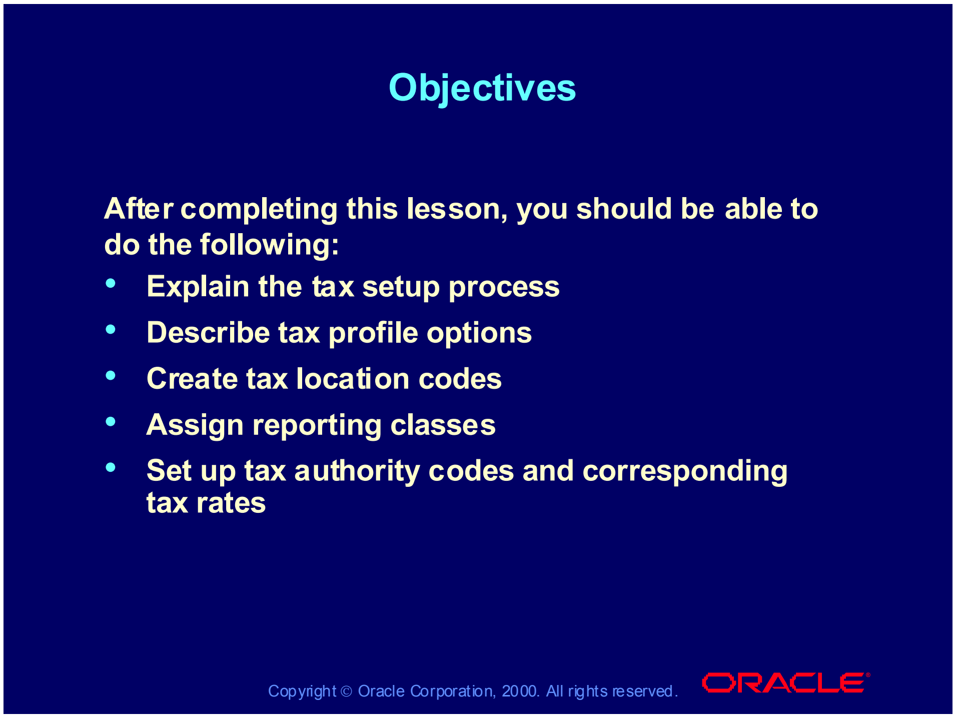
Objectives



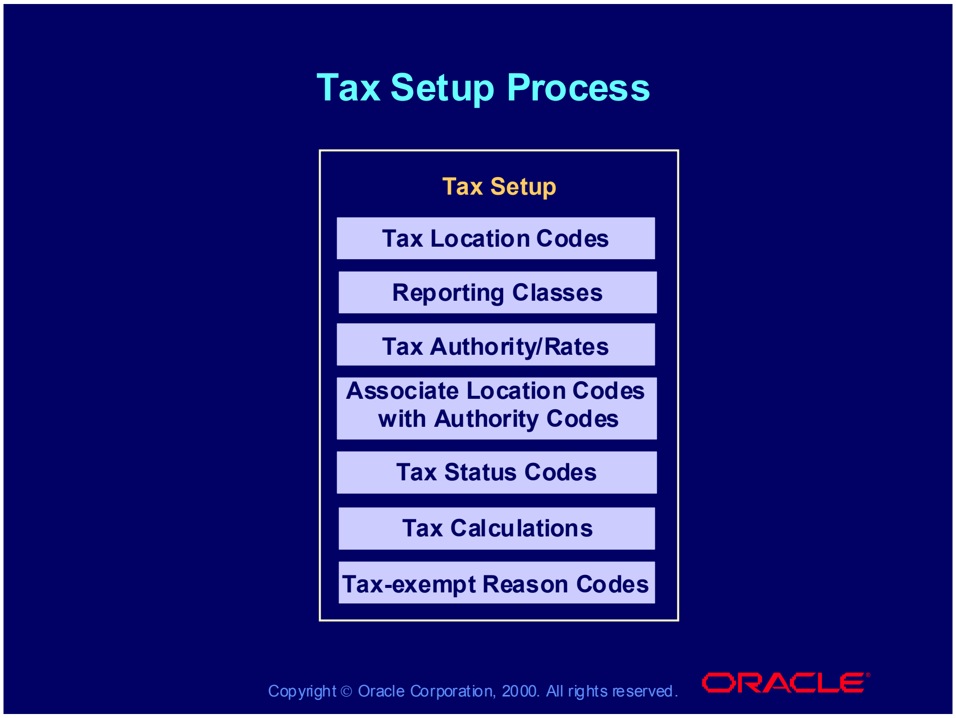
Lesson Topics

This lesson describes the tax setup required to calculate tax liabilities on a sales order. How to define and edit tax location codes, tax reporting classes, and tax authorities and rates will be discussed, as well as how to associate locations with tax authorities. Defining tax status codes and tax calculations, as well as some typical tax calculation preferences, are also presented.

Objectives

- Stipulate location associations
- Define tax status codes
- Enter tax calculations
- Identify exempt reason codes

Tax Setup Process

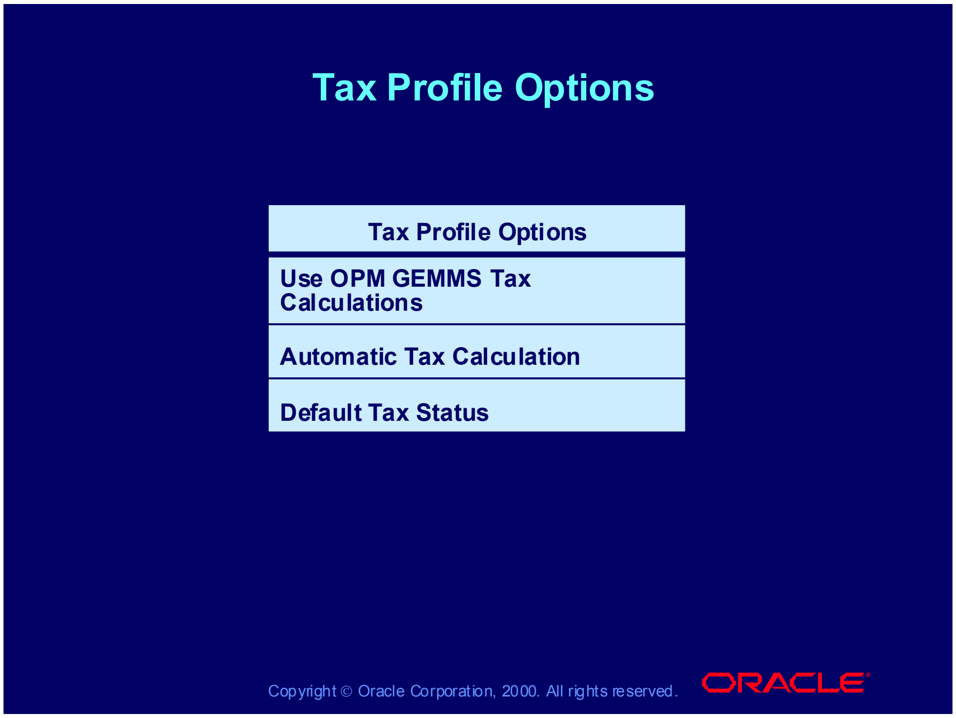


Tax Setup Process

Tax codes, tax rates, and their associations will identify how tax is assigned to your customers, warehouses, sales orders, and invoices. Tax details can be passed from OPM Order Fulfillment to Oracle Receivables in an integrated system.

After completing the setup steps, perform the following steps to use the tax features:

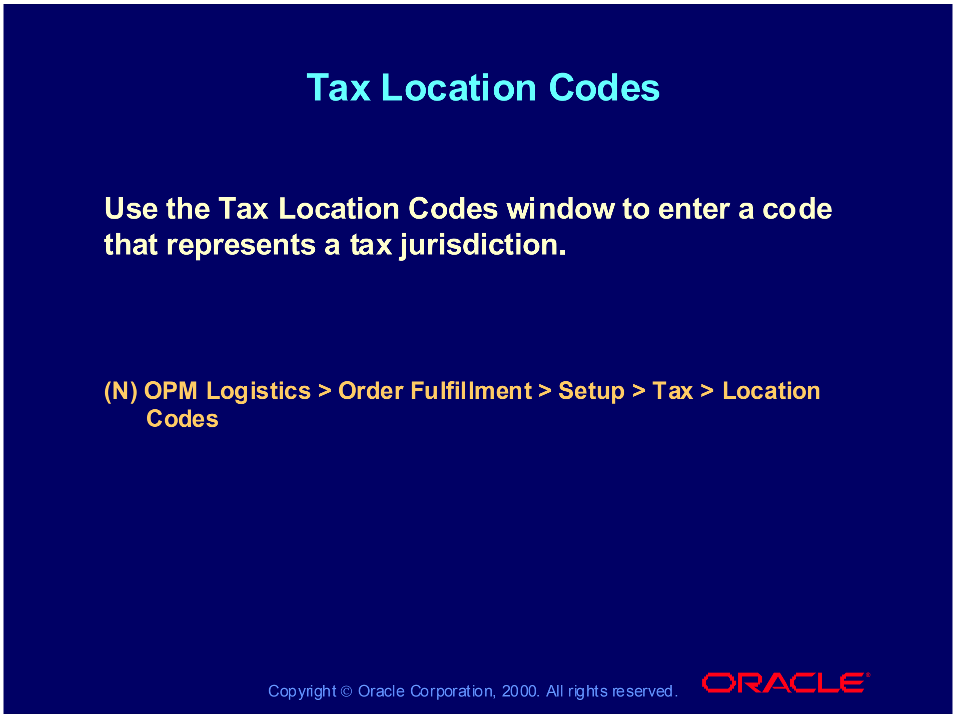
1. Link location codes to customers
2. Link location codes to warehouses
3. Verify Financials setup
   - Fiscal policy
   - Currency codes
   - Ledger codes
   - MAC mapping
4. Assign tax classes to items
5. Verify profile values



Tax Profile Options

Profile Option	Description	Default Profile Value
GML: Use OPM GEMMS Tax Calculations	Switch to turn on OPM tax calculation	0 = Don't calculate taxes using the OPM tax tables (default) 1 = Calculate taxes using the OPM tax tables
GML: Automatic Tax Calculation	Determines whether taxes are calculated automatically (Not currently used)	1
GML: Default Tax Status	Default Tax Status	TAXA

Tax Location Codes



Tax Location Codes

There must be at least one default location code to use for OPM Organizations and attached to at least one customer record, if you are using an integrated system, even if you are not using OPM tax.

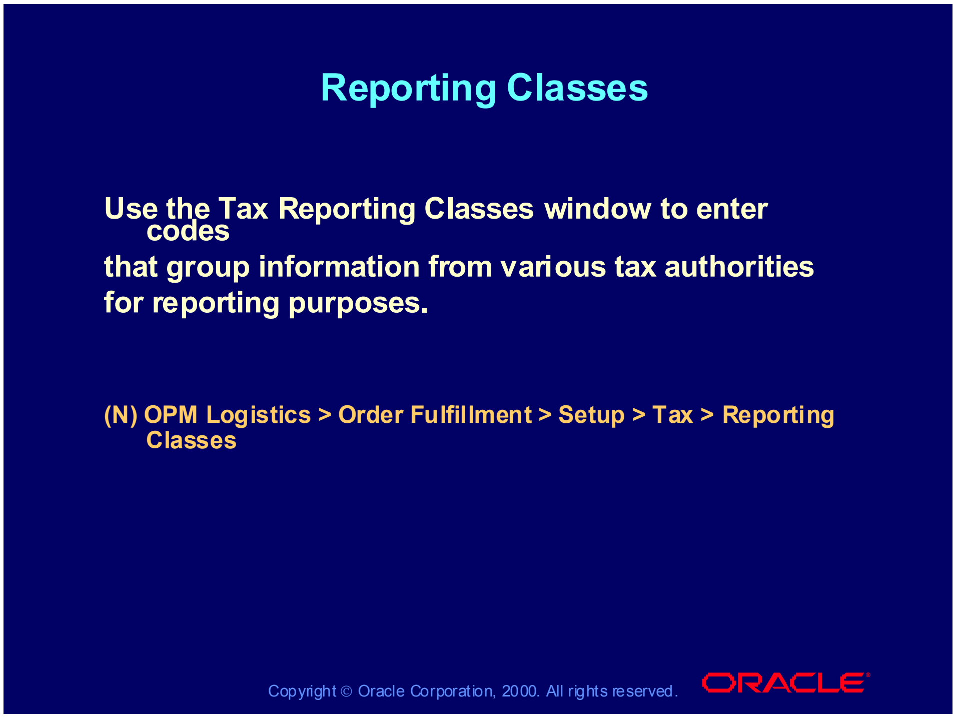
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Tax Setup > Defining Tax Location Codes

... > Defining Tax Location Codes Procedure

... > Tax Location Codes Field Reference

... > Tax Location Codes - Additional Setup Required

Reporting Classes



Tax Reporting Classes

You will assign tax reporting classes to tax authorities and rates as you define them.

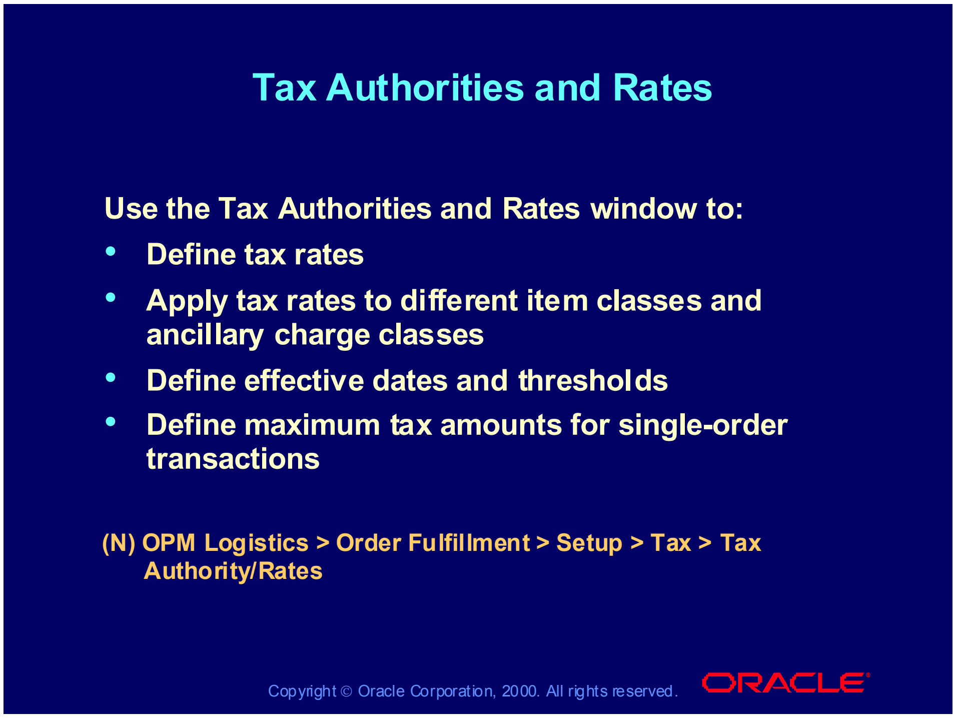
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Tax Setup > Defining Tax Reporting Classes

... > Defining Tax Reporting Classes Procedure

... > Tax Reporting Classes Field Reference

... > Tax Reporting Classes - Additional Tax Setup

Tax Authorities and Rates



Tax Authorities and Rates

You can use the tax authority in OPM Manufacturing Accounting Controller to map the tax details to different account numbers. In order for the tax information to pass to Oracle Receivables, an AR Tax Code must be defined identically to the tax code in OPM. The OPM Tax Authority Base Rate Percent (%) must also be equal to the AR Tax Code Tax Rate Percent.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Tax Setup > Defining Tax Authorities and Rates

... > Defining Tax Authorities and Rates Procedure

... > Tax Authorities and Rates Field Reference

... > Additional Tax Setup

... > Tax Authorities and Rates - Actions Menu Options

Location Associations

Location Associations

Use the Tax Location/Authority Associations window to link tax location codes with tax authorities and rates defined.

(N) OPM Logistics > Order Fulfillment > Setup > Tax > Location Associations

Linking Locations to Tax Authorities

You can associate a tax authority and rate to one or more tax location code. When linking to more than one location code, enter the range of codes (the system will select the range using an ASCII sort).

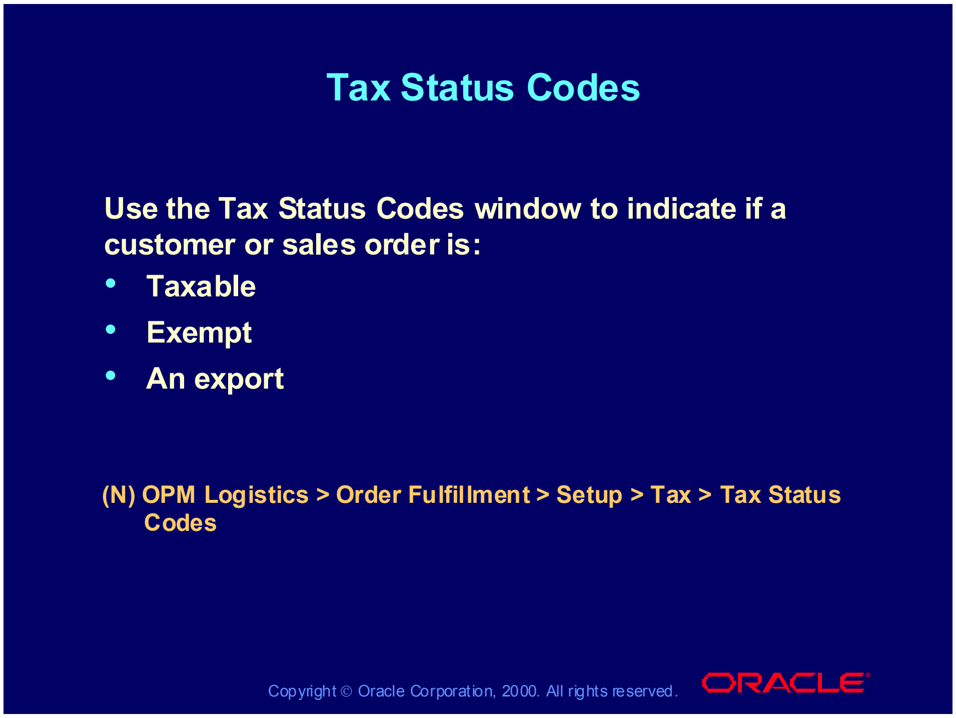
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Tax Setup > Linking Locations to Tax Authorities

... > Linking Locations to Tax Authorities Procedure

... > Tax Location/Authority Association Field Reference

... > Linking Locations to Tax Authorities - Additional Tax Setup

Tax Status Codes



Tax Status Codes

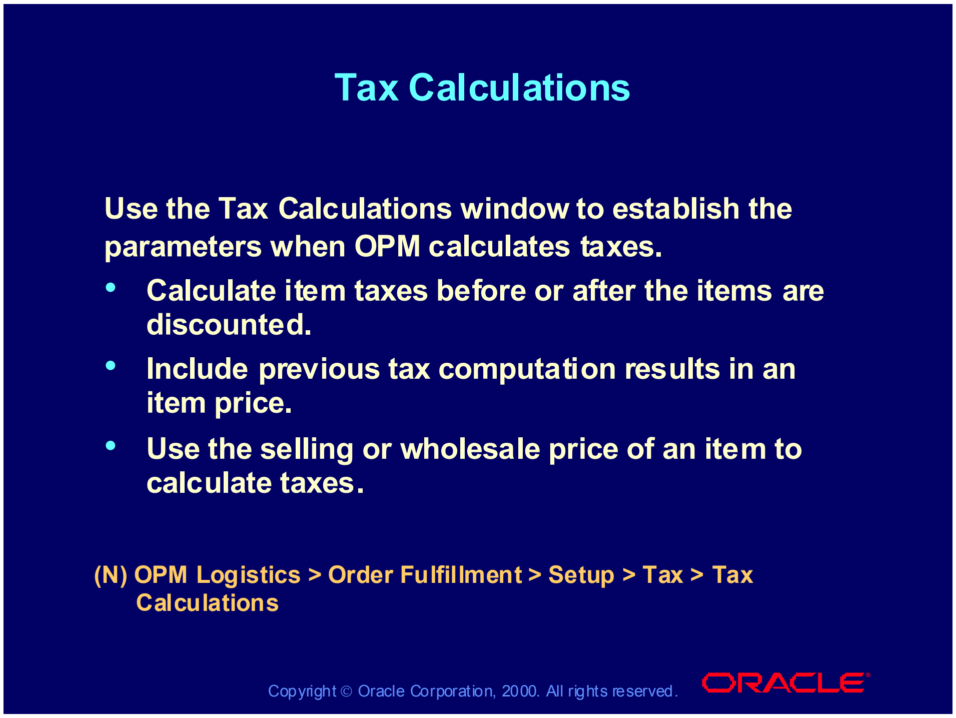
Use the status codes to classify if a customer or an order is taxable, exempt, or an export. You will define tax exempt reason codes that will be linked to explain why the customer is tax exempt.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Tax Setup > Defining Tax Status Codes

... > Defining Tax Status Codes Procedure

... > Tax Status Codes Field Reference

... > Defining Tax Status Codes - Additional Tax Setup



Tax Calculations

A tax calculation may be assigned to one or more customers. You can modify tax amounts at the line level of a sales order.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Tax Setup > Defining Tax Calculations

... > Defining Tax Calculations Procedure

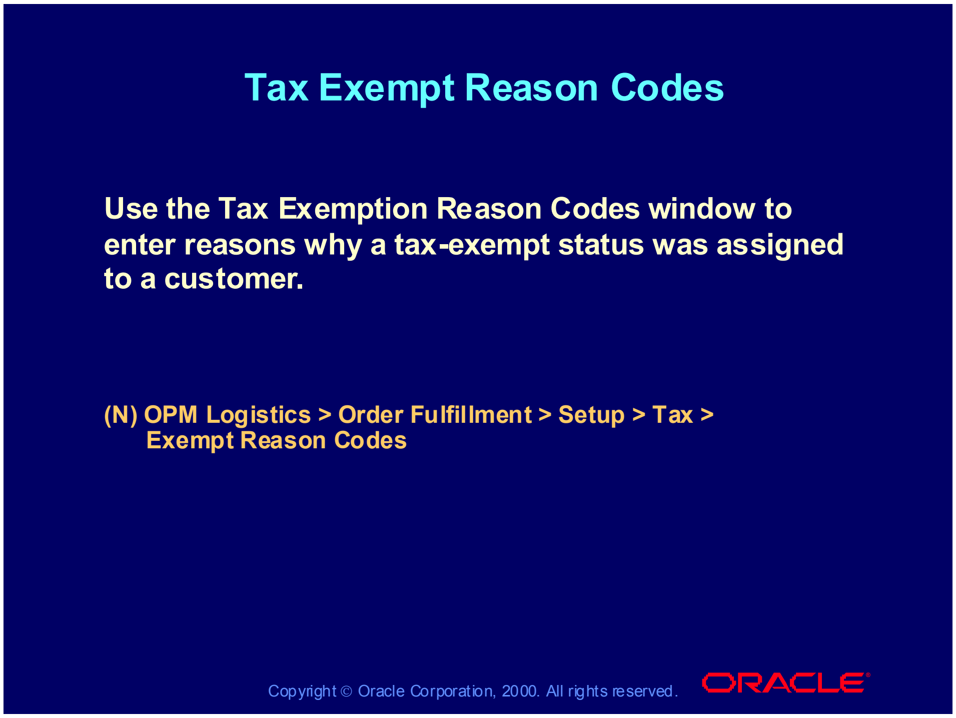
... > Tax Calculations Field Reference

Typical Tax Calculation Preference Settings

The following table lists the typical tax calculation settings for the United States, Canada, and the United Kingdom.

Tax Calculations (continued)

Tax Calc Code Flag	United States	Canadian PST	Canadian GST	United Kingdom VAT
Default Calc	Yes	No	No	No
Comp Goods Amt	Before	After	Before	After
Comp Tax Amt	Before	After	Before	Before
Incl Other Tax	No	No	Yes	No
Price Incl Tax	No	No	No	No
Use Sale Price	Yes	Yes	Yes	Yes
Adjust Tax (Future Release)				
Tax Point Inv	Yes	Yes	Yes	Yes
Tax Point Pay (Future Release)				



Tax Exempt Reason Codes

When a tax status code that has been defined as exempt is assigned to a customer or sales order, a valid reason code must be selected to explain the exemption.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Tax Setup > Defining Tax Exemption Reason Codes

... > Defining Tax Exemption Reason Codes Procedure

... > Tax Exemption Reason Codes Field Reference

... > Tax Exemption Reasons - Additional Tax Setup

Summary

Summary

In this lesson, you should have learned how to:

- Identify exempt reason codes
- Create tax location codes
- Define tax status codes
- Assign reporting classes
- Enter tax calculations
- Assign tax authority/rates
- Stipulate location associations

Entering Order Profiles and Sales Orders

Chapter 8


8
Entering Order Profiles and Sales Orders
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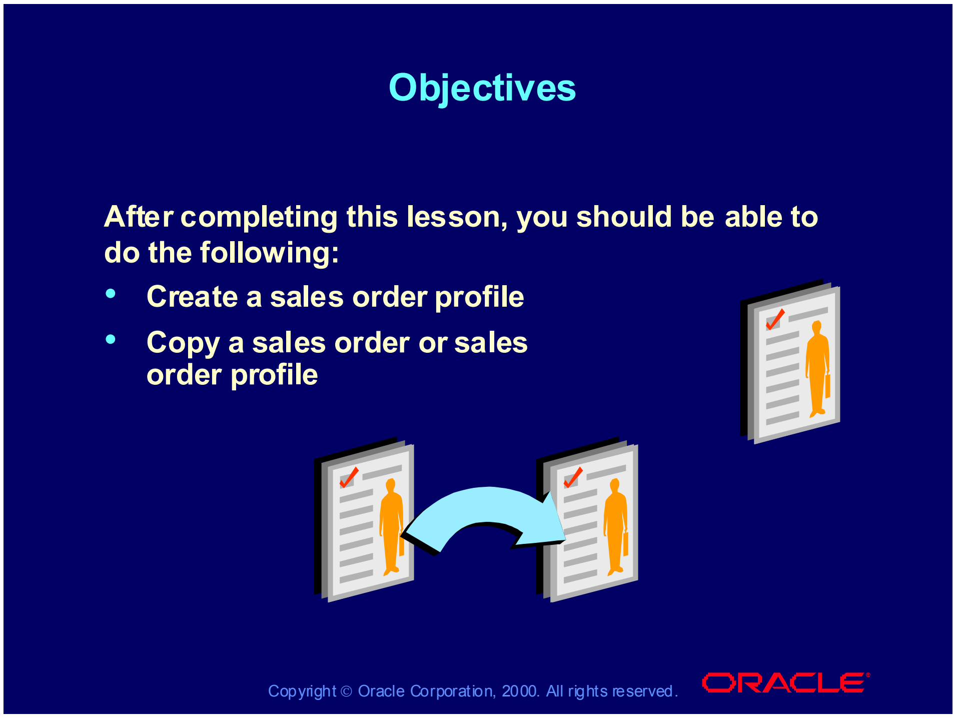
Objectives



Lesson Topics

This lesson describes how to create a sales order profile to serve as a template for creating sales orders and how to copy a profile to create a new sales order. It also describes how to create a new sales order, how to allocate goods for a sales order, and how to view or edit an existing order.

Objectives


Objectives
Create a new sales order
Allocate goods for a sales order
View and edit an existing order
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Sales Order Profiles

Header Information

You can save a profile that contains only Header and Item Quantity information. You can return to that order profile another time to add profile-level information on shipping, billing, and charges, as well as line-level information.

Note: Before you create profiles, you must establish document number parameters for automatic or manual numbering of profiles in OPM System Administration.

Sales Order Profile (continued)

Line Detail Information

You can enter the item in the Item Quantity tabbed page that you want to include on the order profile. This item number can be from one of the following:

- An item number from the OPM item master
- A generic or customer item established in Order Fulfillment Setup
- Customer/Generic Items
- A packaged item from OPM Setup Packaged Items

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Order Profiles > Entering a New Order Profile

... > Entering a New Order Profile Procedure

... > Order Profiles Field Reference

... > Order Profiles - Actions Menu Options

Copying a Sales Order or Profile

Copying a Sales Order or Profile

Use the Order - New window to copy an existing sales order or profile to use as a template for a new order.

(N) OPM Logistics > Order Fulfillment > Sales Orders > Create

Overview

You can copy an existing order or profile to use as a template for a new order.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Creating a New Sales Order

... > Creating a New Sales Order Procedure

... > Order - New Field Reference

... > Sales Orders Field Reference

... > Sales Orders Order Level - Actions Menu Options

... > Sales Orders Line Level - Actions Menu Options

Creating a New Sales Order

Use the Order - New window to:

- Enter a new sales order
- Copy a sales order
- Create a sales order from an order profile

(N) OPM Logistics > Order Fulfillment > Sales Orders > Create

Sales Orders

Use the Order - New window to enter new sales orders or to create orders from established sales orders or order profiles. For each order, you must define basic sales order information on an order header. These values become defaults for the individual order line items, where you designate the items and quantities ordered. You can modify line item details for each line, as required.

Note: To create a new sales order from a scratch order, convert the scratch order to a regular order, then create a new order using that order as the source.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Creating a New Sales Order

... > Creating a New Sales Order Procedure

... > Order - New Field Reference

... > Sales Orders Field Reference

... > Sales Orders Order Level - Actions Menu Options

... > Sales Orders Line Level - Actions Menu Options

Entering New Order Header Information

Entering New Order Header Information

Use the Sales Order window to enter new order header information that will be applied to all line items.

(N) OPM Logistics > Order Fulfillment > Sales Orders > Create

(B) OK

Sales Order Header Information

After you complete the Order - New window, the Sales Order window appears. If you based your new sales order on a profile or on an existing sales order, you can change the default order and line-level field values. If you entered a new sales order with the source listed as new, you can enter the order- and line-level field values.

The Sales Orders window is divided into two regions (or levels), the order header and the order line regions. The information you enter in the order header region applies to all line items included in the order. This order header information defaults to each line item, but you have the option of changing the information for each line item so that the line item information is different from the order header information.

Note: If you change an order level field value, the system displays the message "Changes have been made to the header; propagate to the detail lines?" If you want the field at the line level to have the same value as the corresponding field at the order level, click Yes. Otherwise, click No.

Sales Order Header Information (continued)

You enter header information in the following areas:

1. Order-Level Ship-To Information
2. Order-Level Bill-To Information
3. Order-Level Other Shipping Information
4. Order-Level Contact Information
5. Order-Level Date Information

You enter line information in the following areas:

1. Item Quantity Information
2. Line Description Information
3. Shipping Information
4. Customer Item Information
5. Carrier Information
6. Inventory Information
7. Other Shipping Information
8. Billing Information
9. Dates Information
10. Hold and Status Information
11. Pricing Information
12. Weights Information

(Help) Oracle Manufacturing Applications > Oracle Process

Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Creating a New Sales Order

... > Creating a New Sales Order Procedure

... > Order - New Field Reference

... > Sales Orders Field Reference

... > Sales Orders Order Level - Actions Menu Options

... > Sales Orders Line Level - Actions Menu Options

Entering Header Charges

Entering Header Charges

Use the Header Charges window to enter additional charges applied to the entire order.

(N) OPM Logistics > Order Fulfillment > Sales Orders > Create
(B) OK (M) Actions > Charges

Order-Level Charges Information

If you want to change the charge code that defines the charge or discount that you want to apply to this order from the default value, enter a valid code in the Charge Code field. The charge code defaults from the profile or original order used as a template to create your new order.

The remaining fields display information previously entered in the Charges window. You can edit these fields.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Sales Orders > Entering Header Charges

... > Entering Header Charges Procedure

... > Header Charges Field Reference

Entering Item Details

Entering Item Details

Use the Item Details window to enter additional charges specific to the line item.

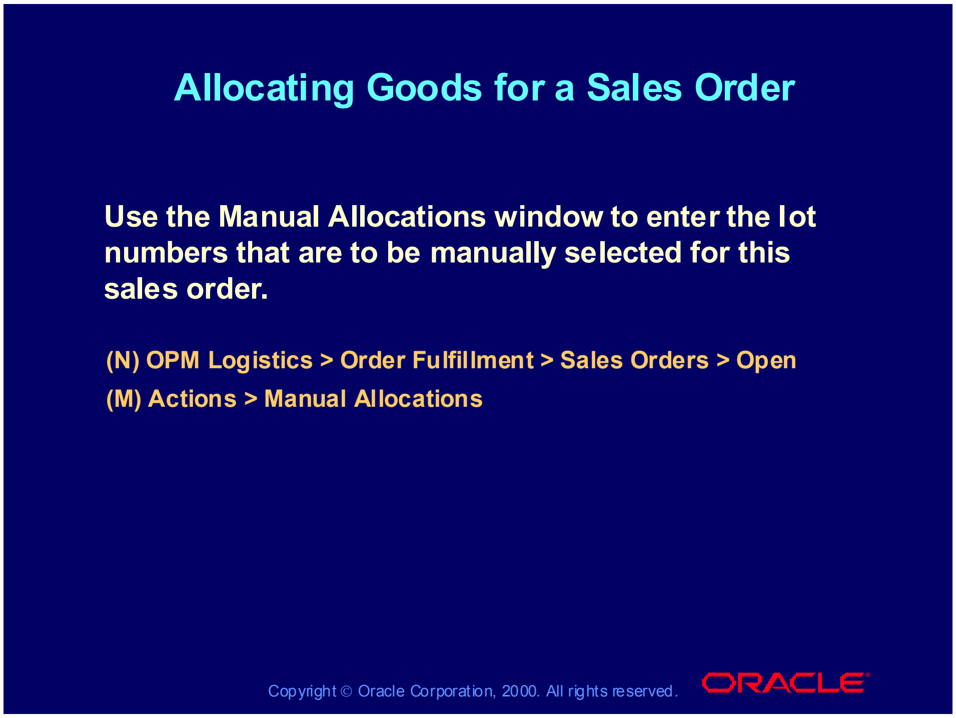
(N) OPM Logistics > Order Fulfillment > Sales Orders > Create
(B) OK (T) Item Quantity

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Entering Item Details

... > Entering Item Details Procedure

... > Item Details Field Reference

Allocating Goods for a Sales Order



Overview

Use the Manual Allocations window to enter the lots that you want to allocate inventory from to fill the order line for location- or lot-controlled items. You must have manual allocation for lot-controlled items that have not been assigned an allocation class and therefore have not been autoallocated.

Note: If in the Inventory Items window you specified that lots of the item can be divided in the Indivisible field, you can specify a quantity that is less than the full lot quantity. You can then allocate from multiple lots to fill the order. If the Indivisible field was set to prevent division of lots of the item, you must allocate fully from one lot.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Entering Manual Allocations

... > Entering Manual Allocations Procedure

... > Manual Allocations Field Reference

... > Allocate Lots/Locations Field Reference

Picking from a List of Lots

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Entering Manual Allocations

... > Entering Manual Allocations Procedure

... > Manual Allocations Field Reference

... > Allocate Lots/Locations Field Reference

Entering Tax Details

Use the Tax Details window to enter the tax authority to which taxes on this line item are paid.

(N) OPM Logistics > Order Fulfillment > Sales Orders > Create

(B) OK (M) Actions > Tax Details

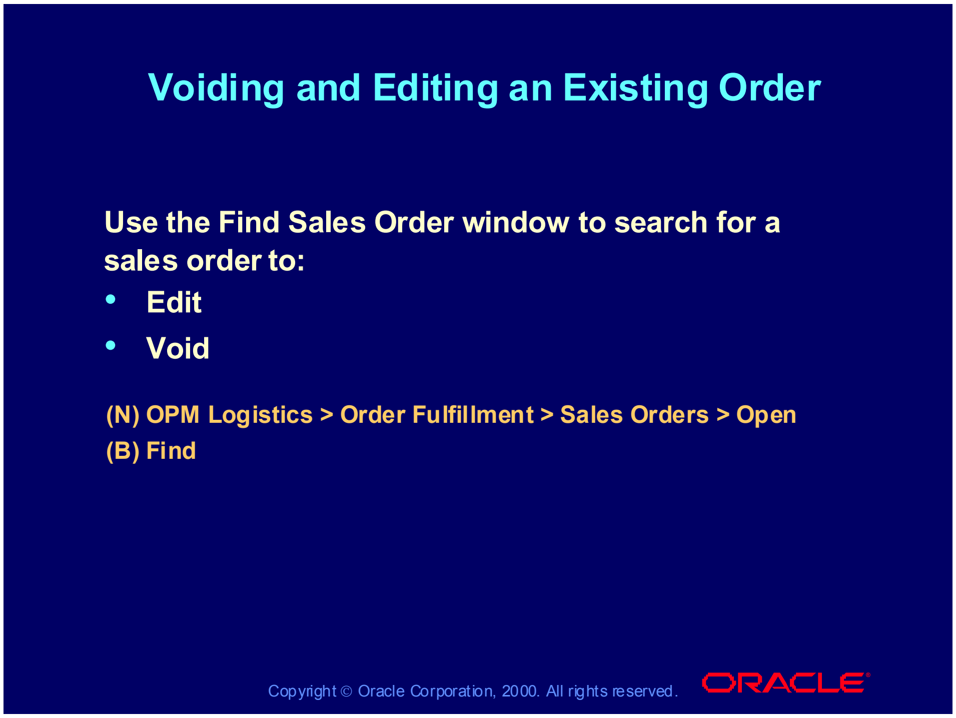
Entering Tax Details

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Entering Tax Details

... > Entering Tax Details Procedure

... > Tax Details Field Reference

Voiding and Editing an Existing Order



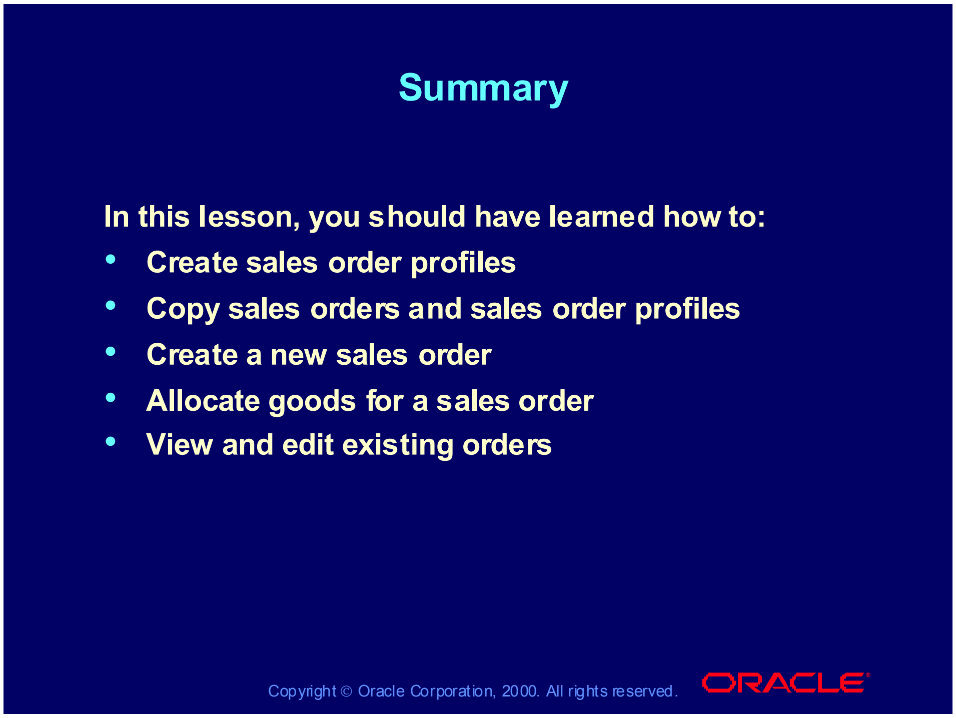
Voiding and Editing an Existing Order

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Editing and Voiding Sales Orders

... > Editing Sales Orders Procedure

... > Voiding Sales Orders Procedure

Summary


Summary
In this lesson, you should have learned how to:
Create sales order profiles
Copy sales orders and sales order profiles
Create a new sales order
Allocate goods for a sales order
View and edit existing orders
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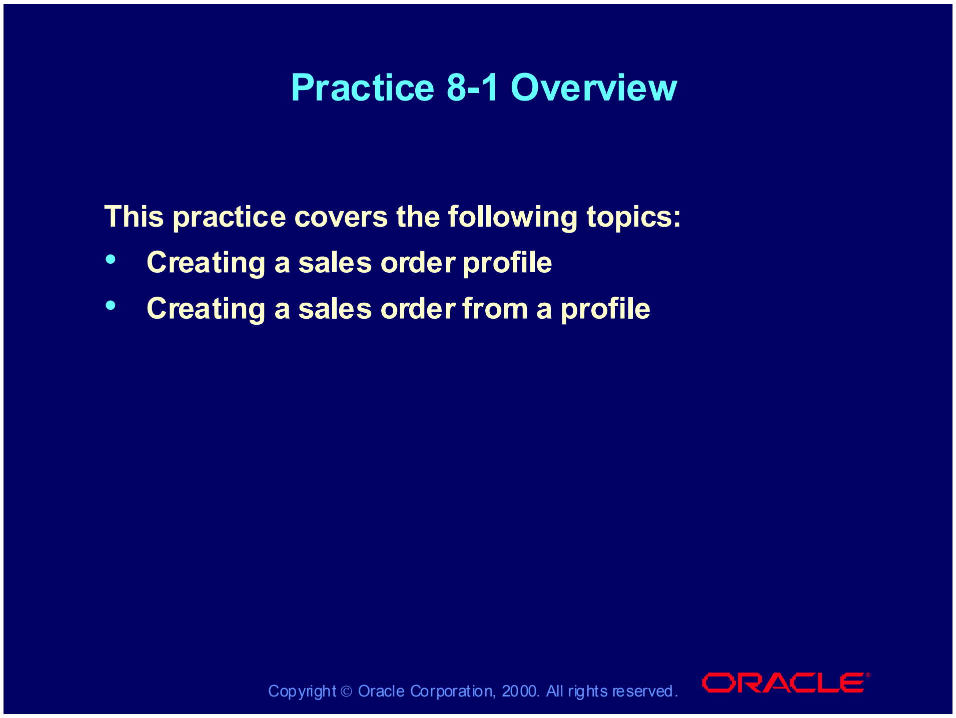
Practice 8-1 Overview



Scenario

With your setup information complete, you can now begin to create sales order profiles and sales orders for your customers.

Step 1: Creating a Sales Order Profile

1. Create a sales order profile with default information that will be used when you create a sales order from a profile.
2. Select one of your customers to associate with this profile.
3. Enter three items to include on your new profile.
4. Add two lines of charges in the Order Profile Additional Information window.
5. Save your new profile and note the number assigned by the system.

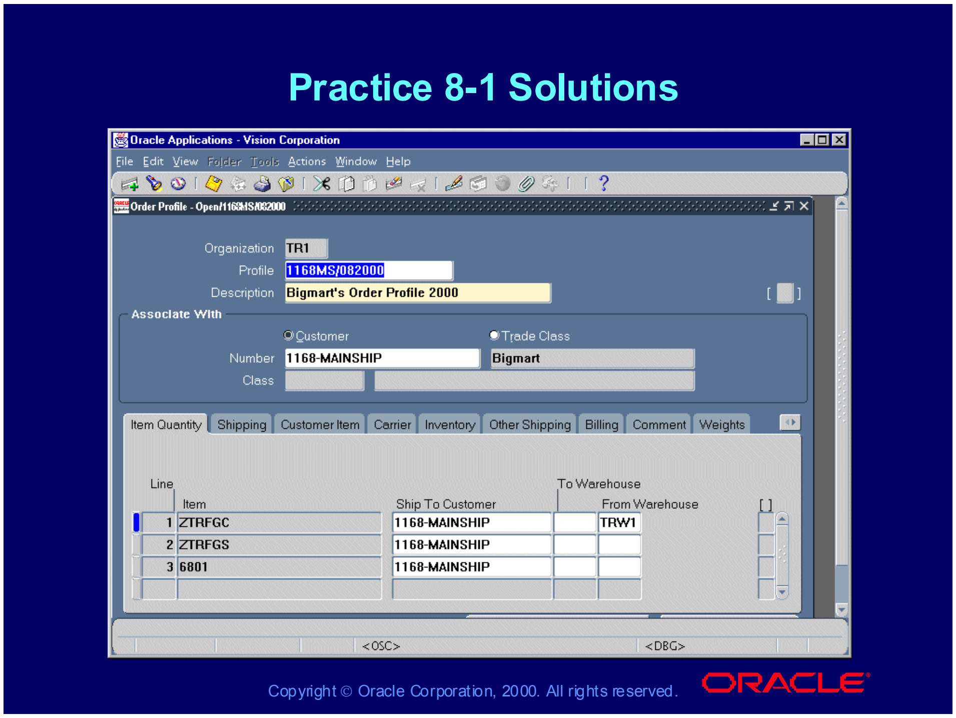
Step 2: Creating a Sales Order from a Profile

1. Create a sales order by using the profile you created in the previous exercise as the source.
2. Select a different order type than the one you selected for your sales order.

Scenario (continued)

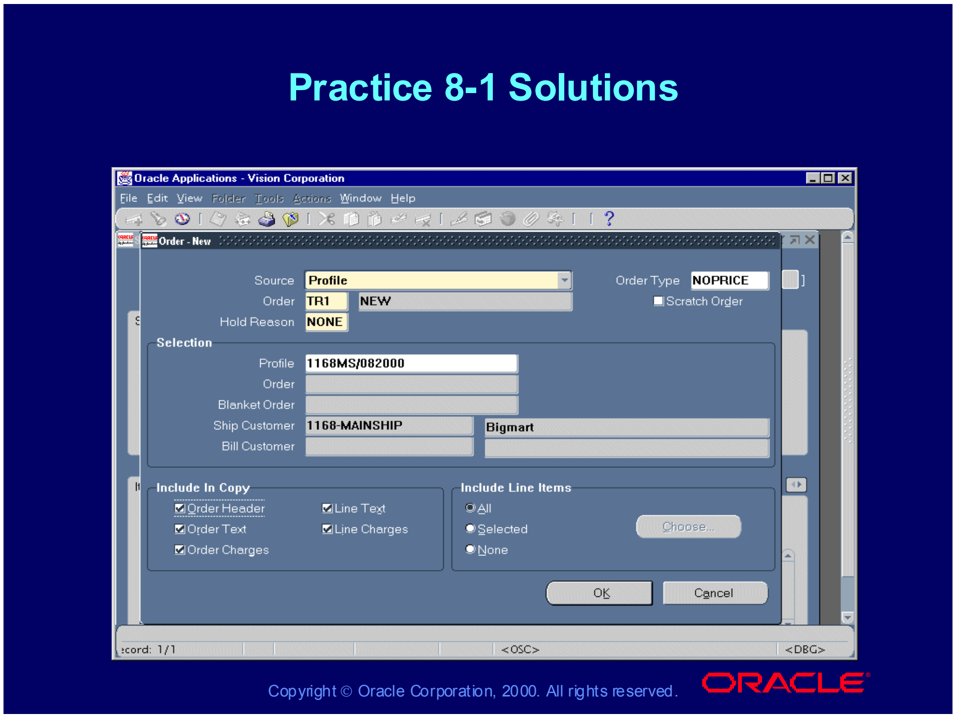
3. Use NONE as the hold reason.
4. Verify that a quantity has been entered for each of your items. Enter a quantity for any that might be missing.
5. Enter the warehouse from which the item will be shipped.
6. Enter an FOB code and the shipping method and carrier that you created in a previous exercise.
7. Save your sales order and record the number the system assigned to it.

Practice 8-1 Solutions



Creating a Sales Order Profile

1. Navigate to the Order Profiles - New window.
   (N) OPM Logistics > Order Fulfillment > Profiles
2. Enter a description of your new profile.
3. Select one of your customers from the list of values to associate with this profile.
4. Select three items from the list of values to include on your new profile.
5. Click the Additional Info button.
6. Add two lines of charges on the Order Profile Additional Information window.
7. Click the OK button. The Order Profiles window appears.
8. Select Save from the File menu to save your new profile, and note the number assigned by the system.



Creating a Sales Order from a Profile

1. Navigate to the Order - New window.

   (N) OPM Logistics > Order Fulfillment > Sales Orders > Create
2. Select Profile as the source of this sales order.
3. Select a different order type than the one you selected for your sales order.
4. Enter NONE as the hold reason.
5. Enter your profile number from the previous exercise in the Profile field.
6. Click the OK button.
7. The Sales Orders window appears with the information that you entered in your profile.
8. Verify that you have a quantity for each of your items. Enter a quantity for any that are missing.
9. Click the Shipping tab in the Sales Orders window.
10. If you did not enter a from-warehouse in your profile, enter one of your warehouses in the From Warehouse field of your sales order.

Creating a Sales Order from a Profile (continued)

11. Click the Carrier tab.
12. If necessary, enter a free on board (FOB) code.
13. Enter the shipping method and carrier that you created in a previous exercise, or select them from the list of values.
14. Save your new sales order, and record the number assigned by the system.

Practice 8-2 Overview

Practice 8-2 Overview

This practice covers the following topics:

- Creating a sales order
- Allocating goods for a sales order
- Viewing and editing an existing order

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Scenario

Create a sales order for your customer, using a lot-controlled item.

Step 1: Creating a New Sales Order

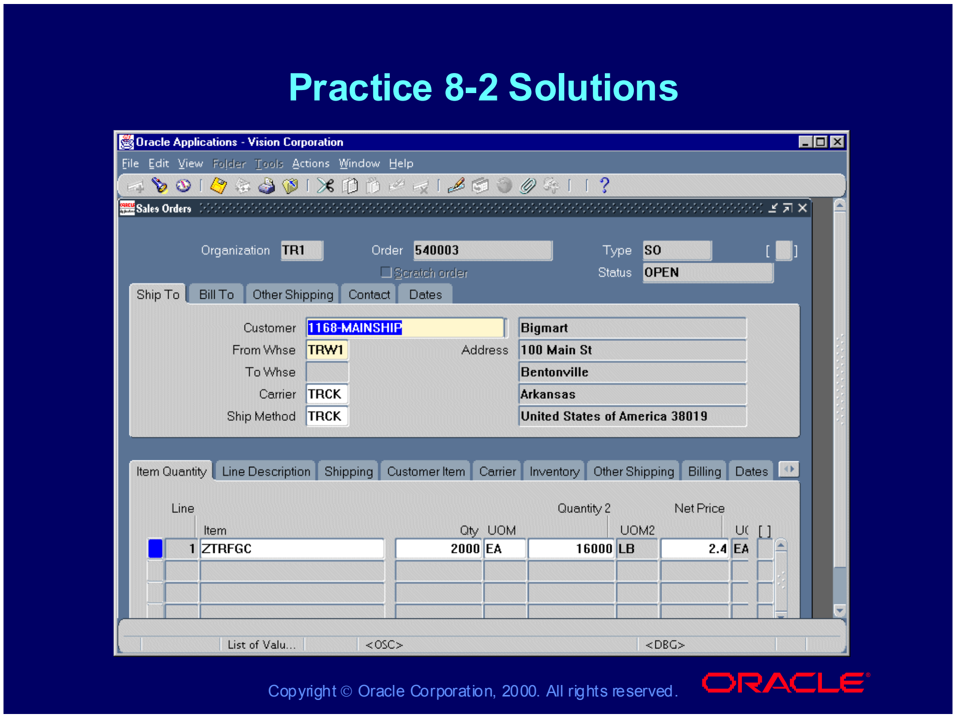
1. Create a new sales order for some of your finished goods: *XX*FGS, *XX*RM1S, and *XX*FGC. *XX* represents the two letters assigned by your instructor.
2. Use the order type you set up in a previous practice, *XX*OT1.
3. Select a hold reason that will not prevent the processing of the order.
4. Use the first customer you created in Practice 3-1.
5. Enter the warehouse from which to ship ordered items.
6. Enter the carrier and ship method that you set up in a previous exercise.
7. Enter your three finished goods, *XX*FGS, *XX*RM1S, and *XX*FGC.
8. Enter any additional shipping, customer item, carrier, billing, hold and status, pricing, or weight information you may want to add.
9. Enter the lots that you want to allocate inventory from to fill the order line for location- or lot-controlled items.

Scenario (continued)

10. Save your sales order and record your new sales order number.

Step 2: Viewing an Existing Order

1. Use the Find Sales Orders window to locate all the sales orders with an Open Order status created for your assigned organization.
2. Page down through all the sales orders to find all the sales orders that you created.
3. (Optional) Edit any information on one of your sales orders and save the changes.



Creating a New Sales Order

1. Navigate to the Order - New window.
   (N) OPM Logistics—>Order Fulfillment—>Sales Orders—>Create
2. Select New as the source of this sales order.
3. Use the order type you set up in a previous practice, *XX*OT1.
4. Select NONE as the hold reason.
5. Click the OK button. The Sales Orders window appears.
6. Select your customer number created in Practice 3-1.
7. Enter the warehouse from which to ship ordered items, or select it from the list of values.
8. Enter the carrier that you set up in a previous exercise, *XX*CA.
9. Enter the ship method that you set up in a previous exercise, *XX*SM.
10. Enter your three finished goods: *XX*FGS, *XX*RM1S, and *XX*FGC.
11. (Optional) You may select any of the tabs in the lower region of the window and enter any additional shipping, customer item, carrier, billing, hold and status, pricing, or weight information.

Creating a New Sales Order (continued)

12. Select Manual Allocations from the Actions menu to enter the lots that you want to allocate inventory from to fill the order line for location- or lot-controlled items.
13. Save your sales order and record your new sales order number.

Practice 8-2 Solutions

Viewing an Existing Order

1. Navigate to the Find Sales Orders window.

   (N) OPM Logistics > Order Fulfillment > Sales Orders > Open

2. Locate all the sales orders with an open order status created for your assigned organization.

Creating Blanket Sales Orders

Chapter 9


9
Creating Blanket Sales Orders
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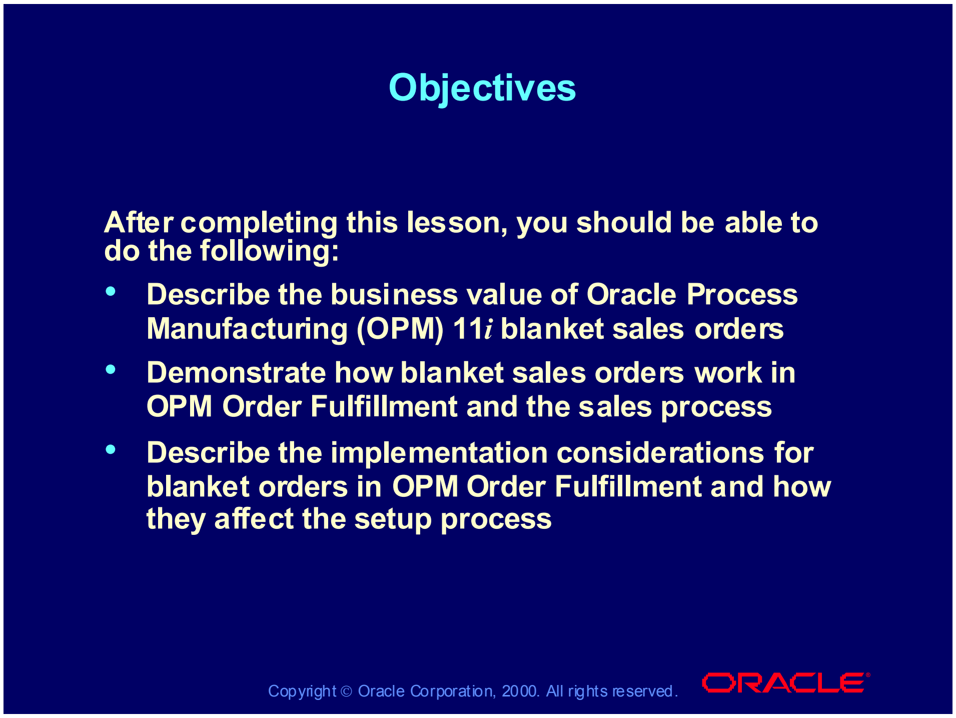
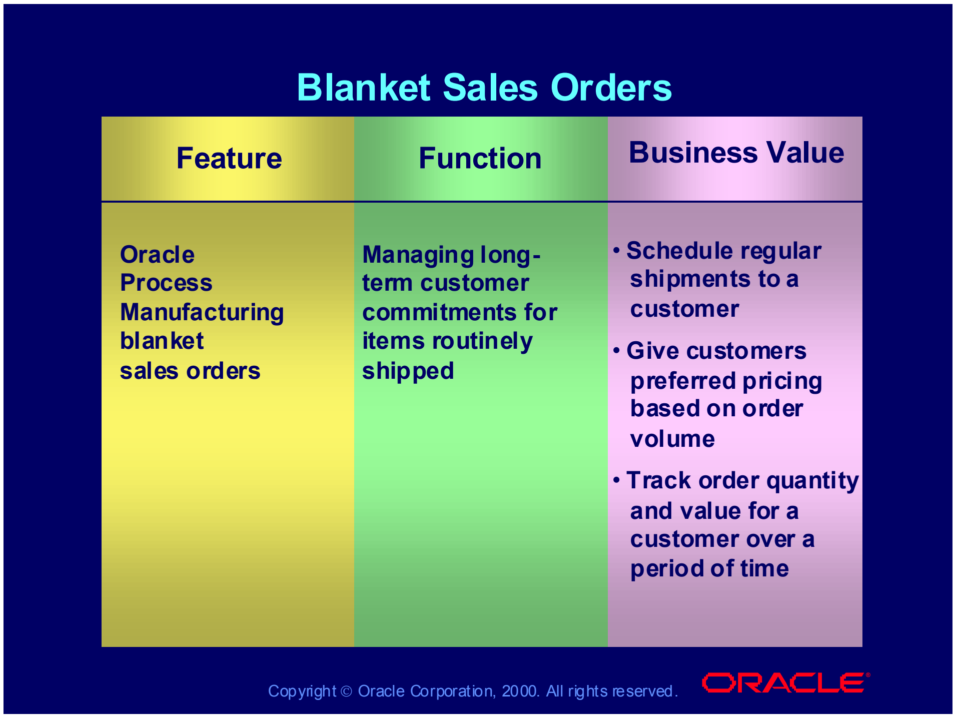
Objectives



Lesson Topics

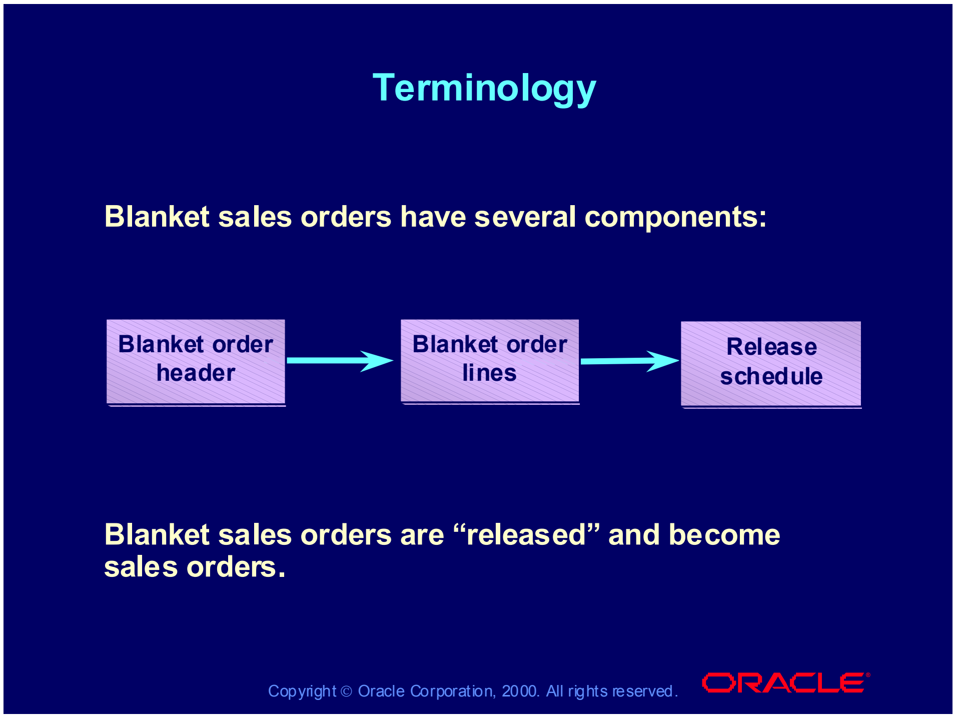
This lesson describes how to use blanket sales orders (BSOs) to routinely ship items to your customers. You will also discuss why BSOs are important to sales processing. Additionally, you will learn how to set up and create a BSO.



Business Value

- Manage long-term customer commitments
- Track overall quantity and value on one or more items
- Manually or automatically generate release schedules which is the basis of manual or automatic generation of sales orders
- Integrate to the advanced pricing engine

Terminology



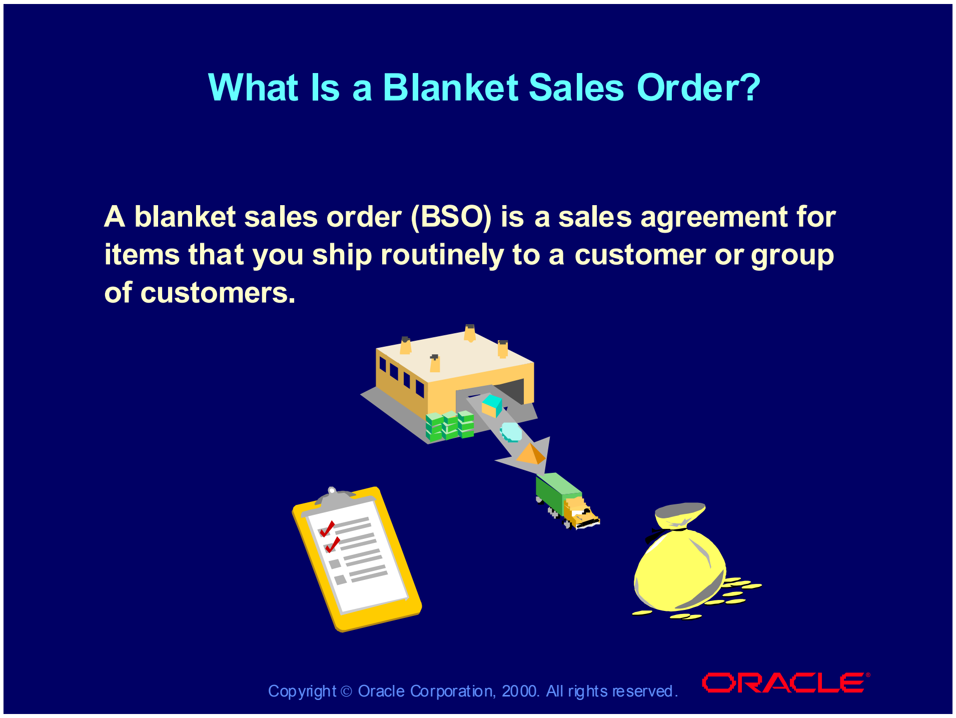
Blanket Order Components

Blanket order components are:

- Blanket order header (contains customer and default information for the entire order)
- Blanket order lines (contains item information)
- Release schedules (information on when and how much of an item will be shipped)

Note: The word “release” as a noun is synonymous with a sales order. The action “release” (verb) is the creation of a sales order from a blanket order.

What Is a Blanket Sales Order?

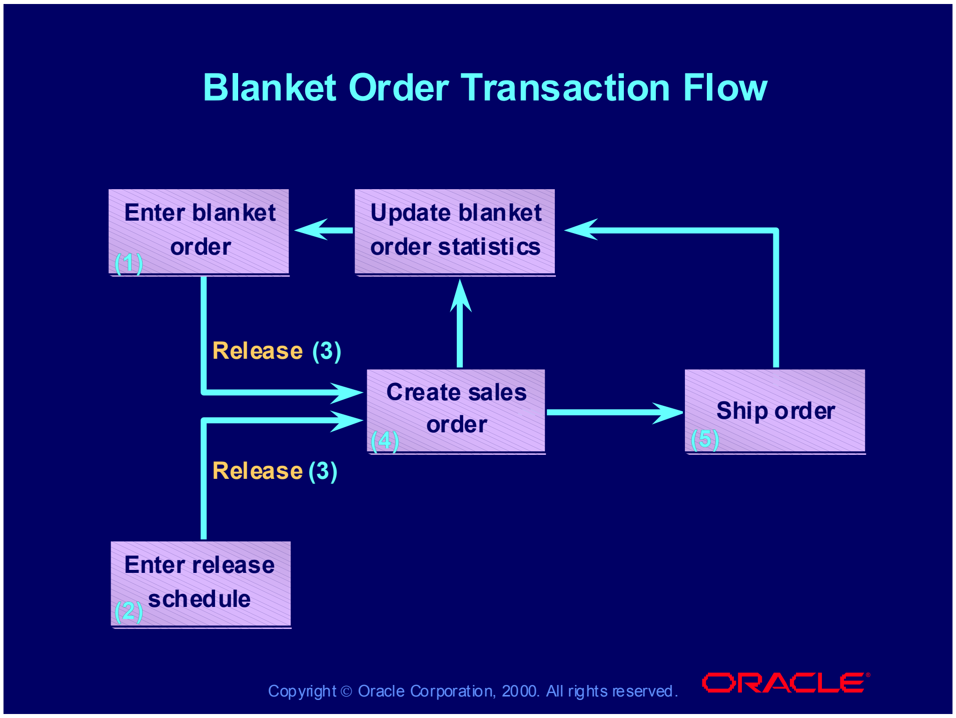


Using BSOs

Use blanket sales orders for:

- Scheduling regular shipments to customers
- Giving customers preferred pricing based on their order volume for a period of time
- Tracking order quantity and value for a customer over a period of time

Blanket Order Transaction Flow

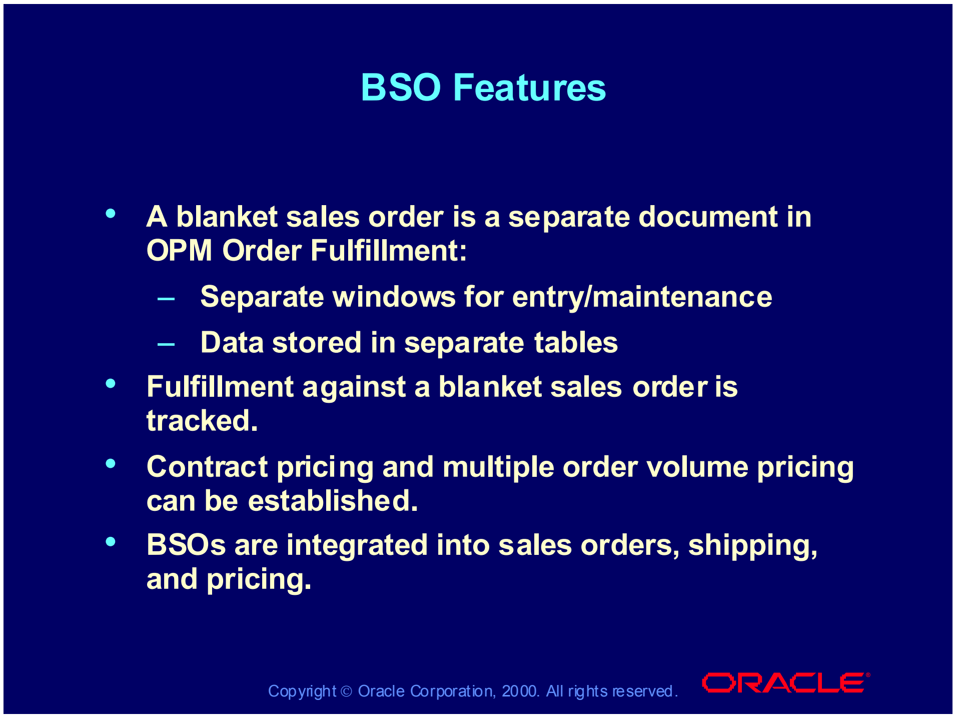


Blanket Order Flow

The general flow for blanket orders is:

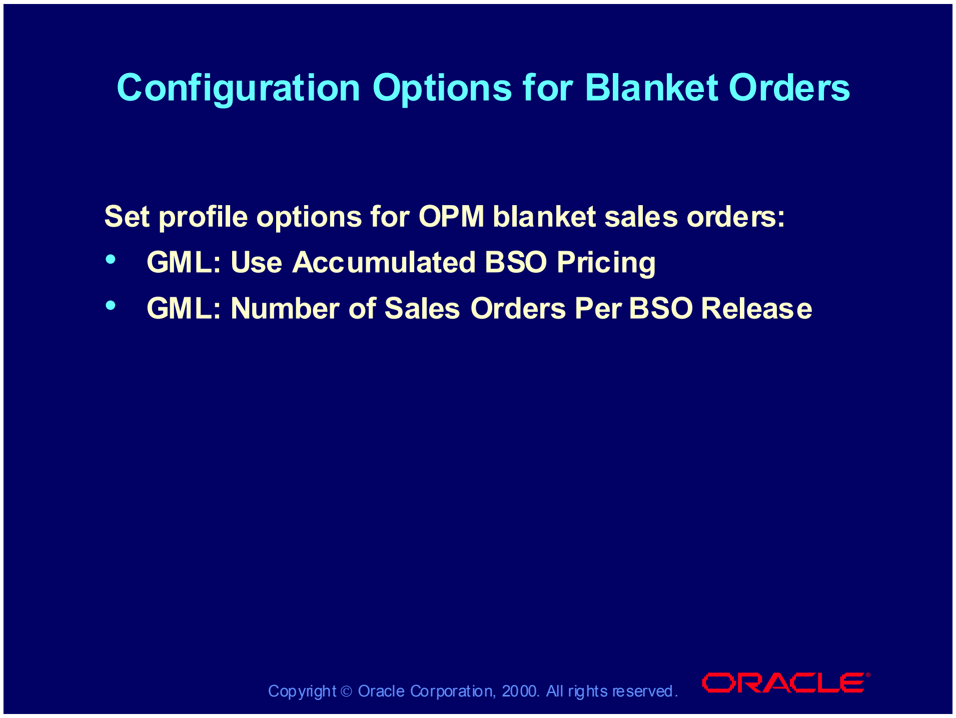
1. A blanket order is entered, with customer and item information.
2. (Optional) A release schedule is entered for each line item detailing scheduled ship dates and quantities.
3. The blanket order is released, using one of the three methods described in this course.
4. The release of the blanket order creates a sales order, which is a commitment to deliver goods. The creation of the sales order updates statistics on the blanket order to indicate how much of each item was released.
5. The goods are shipped against the sales order. The shipment of the order updates statistics on the blanket order to indicate how much of each item was shipped (which decrements the statistics for the quantity released).

BSO Features



BSO Features

- There is a separate document type for blanket sales orders: OPBO.
- The user must set up Document Numbering in the OPM System Administration application before using blanket sales orders.
- Blanket orders are not visible to Material Requirements Planning (MRP).
- Blanket orders do not create any pending or completed inventory transactions.



Configuration Options for Blanket Orders

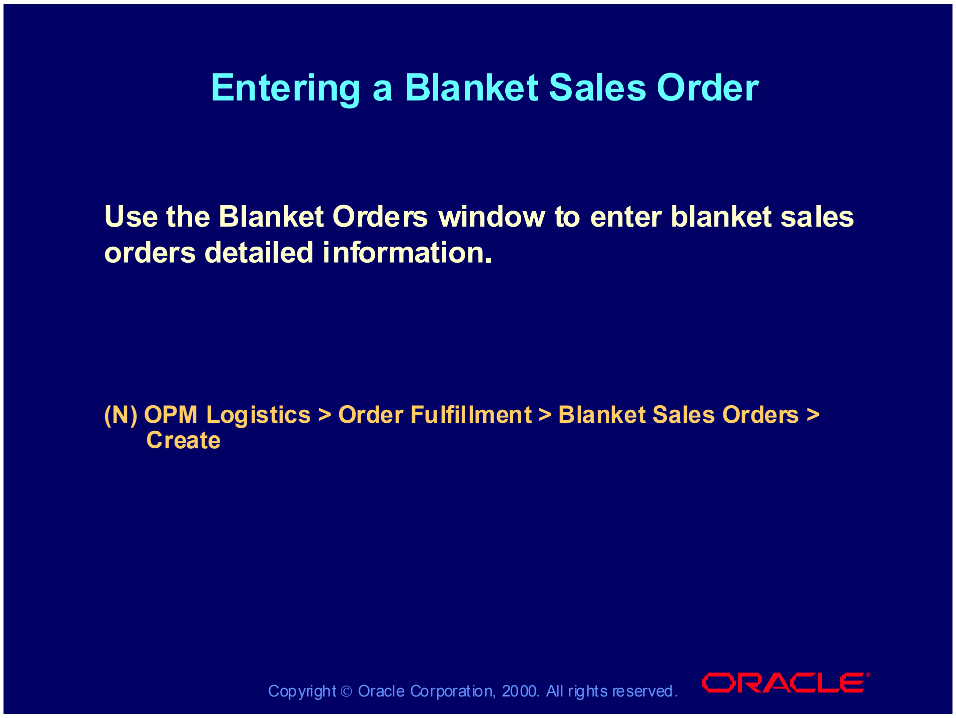
GML: Use Accumulated BSO Pricing

- This profile option supports cross-order volume pricing.
- A value of 0 prices each order line separately based on its quantity or value.
- A value of 1 prices each order line on the quantity or value accumulated for that item across releases for the blanket order.

GML: Number of Sales Orders Per BSO Release

- This profile option is used for Automatic Release and release from a Release Schedule.
- A value of 0 creates one sales order for each blanket order to be released.
- A value of 1 creates multiple sales orders, one for each release schedule line on a blanket order.

Entering a Blanket Sales Order



Entering a Blanket Sales Order

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Blanket Sales Orders > Creating a New Blanket Sales Order

... > Creating/Copying a New BSO Procedure

... > New Blanket Order Field Reference

Quantity and Value Definitions

Quantity and Value Definitions

- Blanket Total Values - Maximum
- Contract Quantity /Value
  - Quantity/Value
    - Minimum
    - Maximum
  - Release Quantity/Value
    - Minimum
    - Maximum

Defining Quantity and Value

- Quantities and values are not required. If you do not specify quantities or values, the BSO will not track them.
- Quantities are measured in units; values are measured monetarily.

Blanket Total Values

In the Additional Information tabbed page on the BSO header, the Maximum field in the Blanket Total Values region specifies the maximum monetary value for the Blanket Order in total. The sum of BSO open value (all open releases) and the shipped value (shipped sales orders released against the BSO) cannot exceed the BSO maximum value.

Blanket Line Quantity/Value Limits

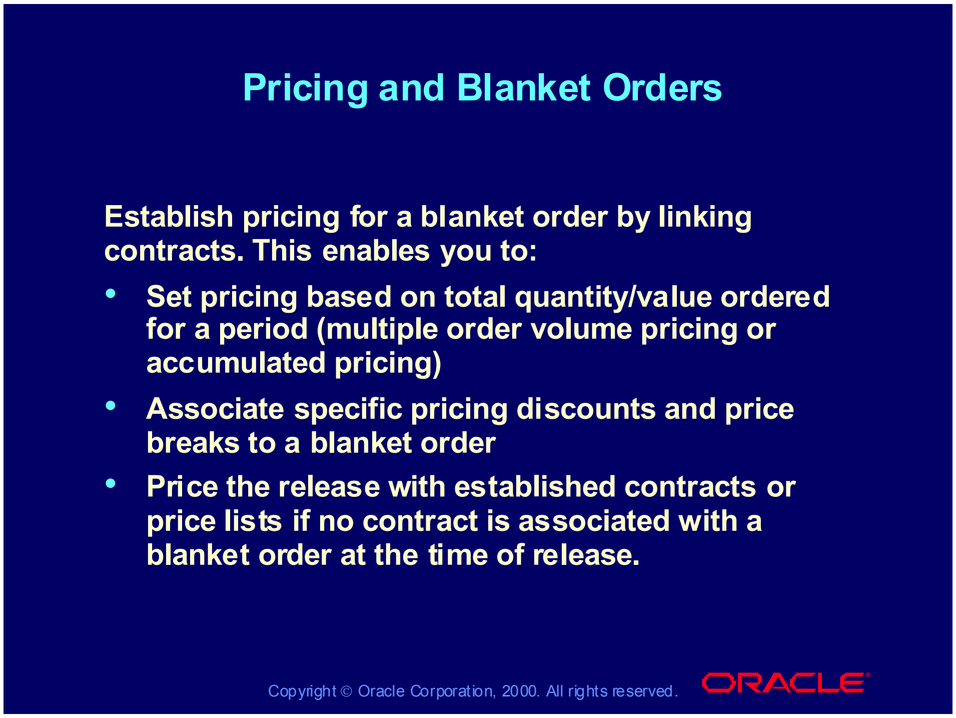
- Minimum/maximum contract quantity/value

  In the Contract Quantity and Contract Value tabbed pages, the Minimum and Maximum fields in the Quantity region refer to the minimum and maximum quantity and value that can be released against a BSO line during its lifetime. The line cannot be closed until the minimum has been met and a line will not be released if the line exceeds the maximum. The minimum and maximum cannot be changed once a release has been made against the line.

Blanket Line Quantity/Value Limits (continued)

- Minimum/maximum release quantity/value

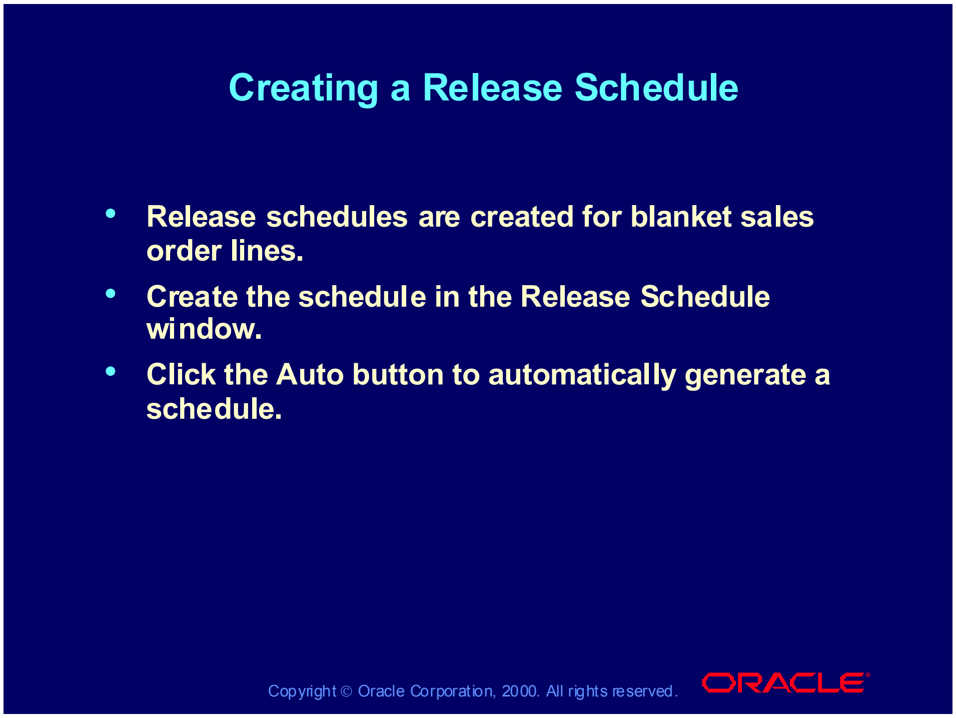
  In the Contract Quantity and Contract Value tabbed pages, the Minimum and Maximum fields in the Release Quantity region or Release Value region refer to the minimum and maximum quantity and value that can be allowed for any single release. The BSO line cannot be closed until the line minimum has been met, nor will it be released if it exceeds the maximum. The minimum and maximum cannot be changed once a release has been made against the line.



Pricing and Blanket Orders

The Total Order Pricing indicator on the Order Type is not used for blanket releases.

Blanket releases are priced based on order line quantity or value only.

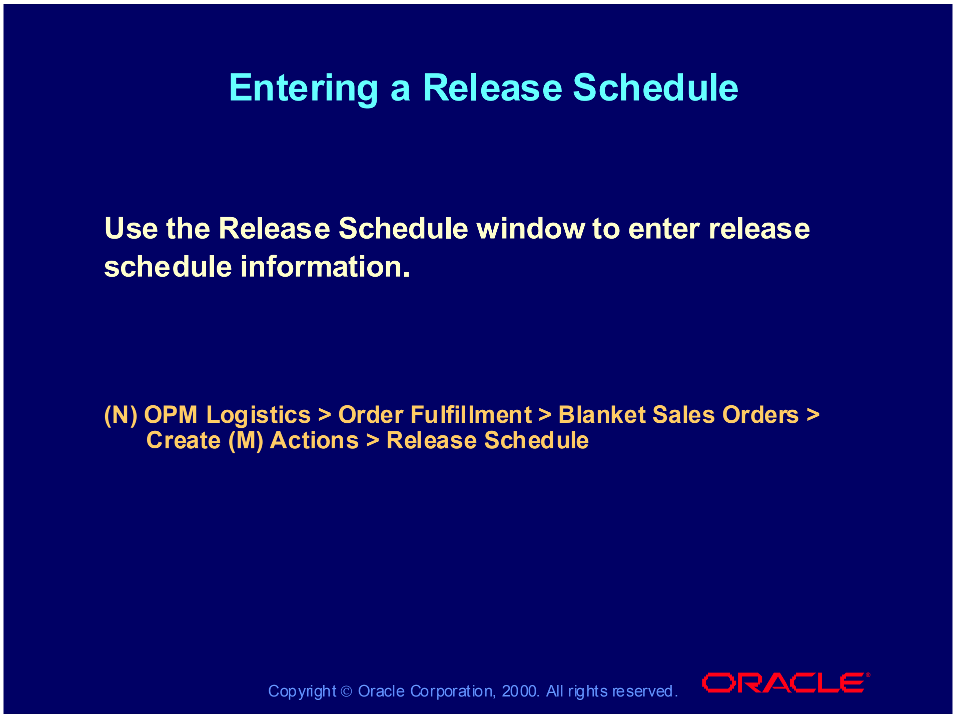


Release Schedules

Release schedules are not required, except for automatic release of blanket orders. A separate part of the Blanket Order form allows entry of a release schedule for each blanket order line. You can manually enter all information for a release schedule (scheduled ship dates, ship from warehouse, item quantity). The Auto button in the Release Schedule window displays parameters so that a release schedule can be generated.

Example: If the customer wants delivery of the same quantity every week, you can generate the release schedule by indicating that the same quantity needs to be released every week. Otherwise, you would have to manually create a release schedule line for each weekly delivery.

Entering a Release Schedule



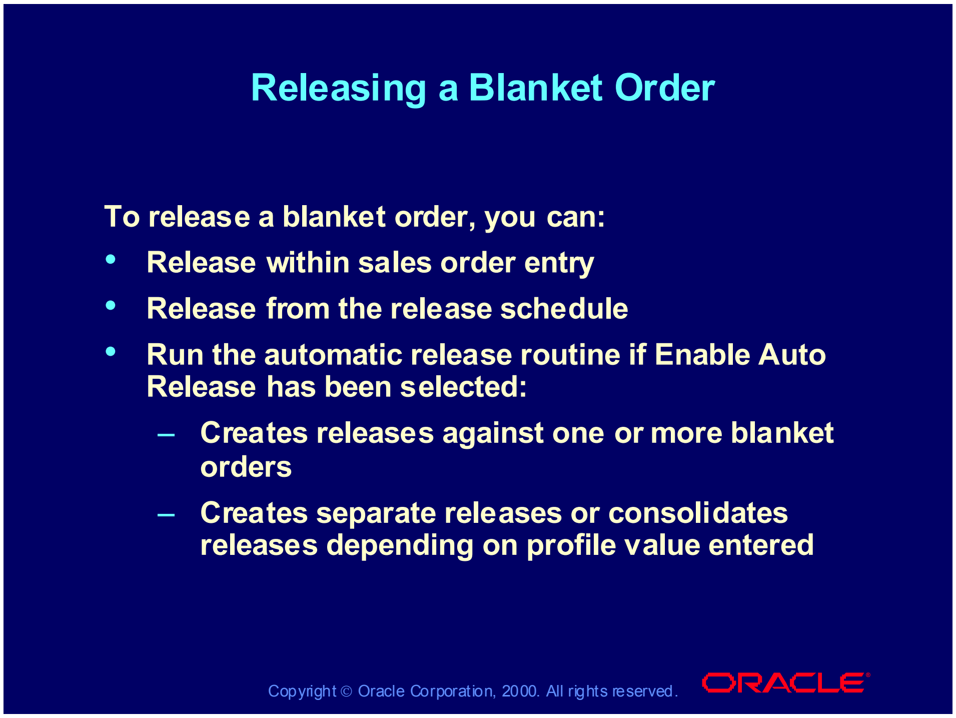
Entering a Release Schedule

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Blanket Sales Orders > Entering a Release Schedule

... > Creating/Copying a New BSO Procedure

... > New Blanket Order Field Reference

Releasing a Blanket Order



Releasing a Blanket Order

These are three ways to release against a blanket sales order. The first two ways create releases against only one blanket order. The third way (automatic release) creates releases against one or more blanket orders.

Blanket Order Statistics

When sales orders and shipments are created against blanket orders, the following statistics on the blanket sales order line are updated:

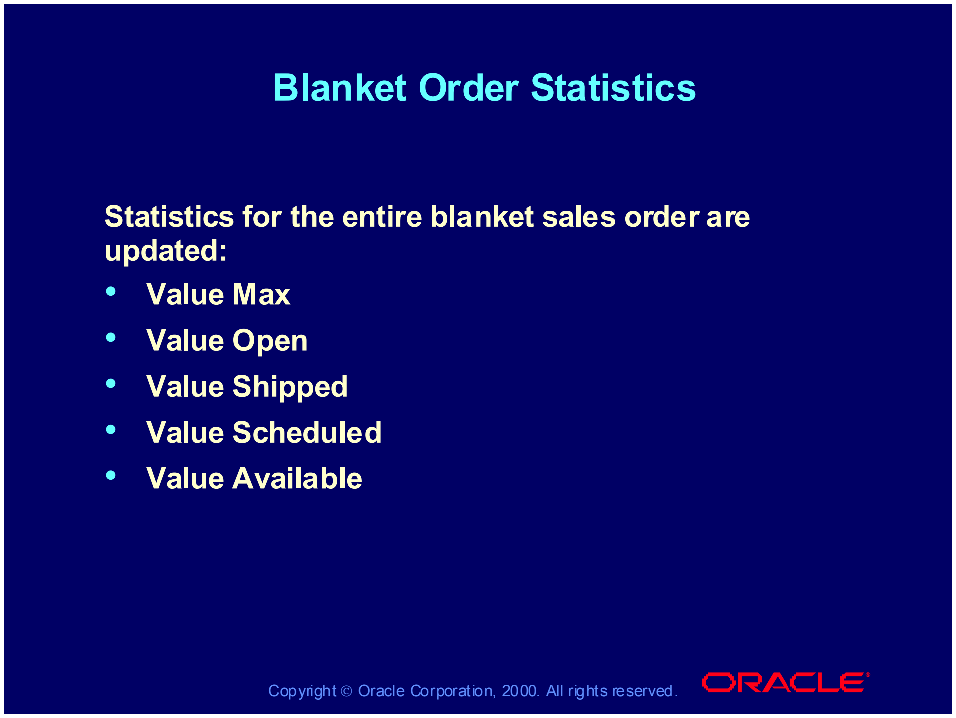
- Open Quantity and Value
- Shipped Quantity and Value
- Scheduled Quantity and Value
- Available Quantity and Value

Blanket Order Statistics

Statistics maintained for each Blanket Order Line include:

- Open Quantity and Value:This is the quantity (and corresponding value) that has been released to sales orders.
- Shipped Quantity and Value:This is the quantity (and corresponding value) that has been shipped to the customer.
- Scheduled Quantity and Value:This is the quantity (and corresponding value) that has been placed on a release schedule.
- Available Quantity and Value:This is the quantity (and corresponding value) that has not been scheduled, released, or shipped. This number is derived from the maximum quantity or value on the line.

Blanket Order Statistics



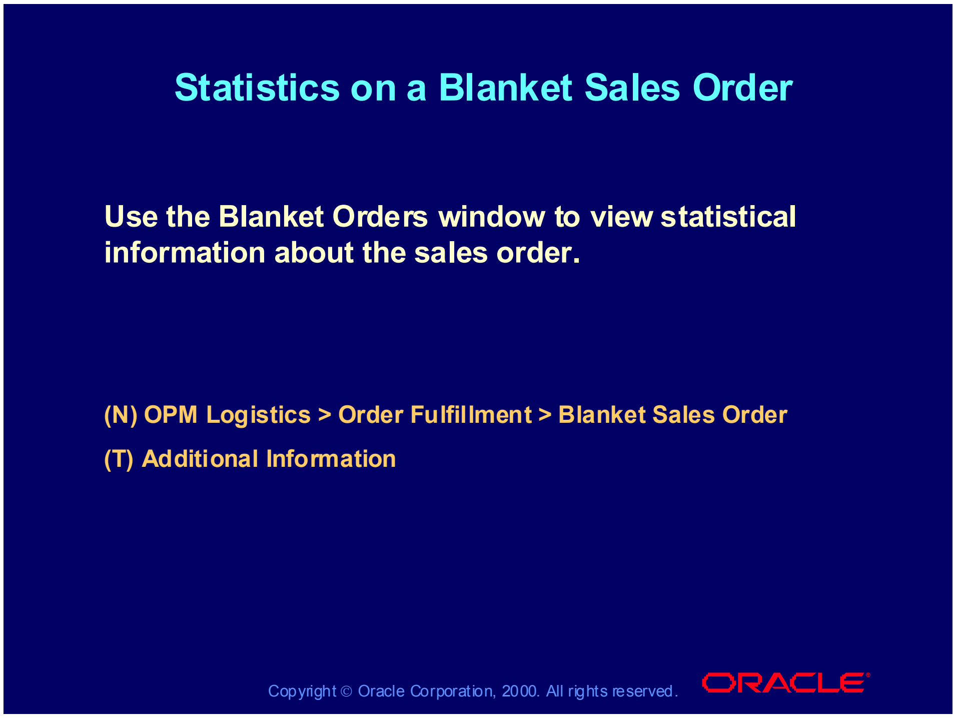
Blanket Order Statistics (continued)

Statistics maintained for each blanket order (header) include the following:

- Value Max: This is the maximum value for the blanket order, as entered by the user.
- Value Open: This is the value that has been released to sales orders.
- Value Shipped: This is the value that has been shipped to the customer
- Value Scheduled: This is the value that has been placed on a release schedule.
- Value Available: This is the value that has not been scheduled, released, or shipped. This number is derived from the Maximum Value on the order

Note: Only statistics pertaining to “value” are maintained for the entire blanket order. Quantity statistics are maintained only at the line level.

Statistics on a Blanket Sales Order



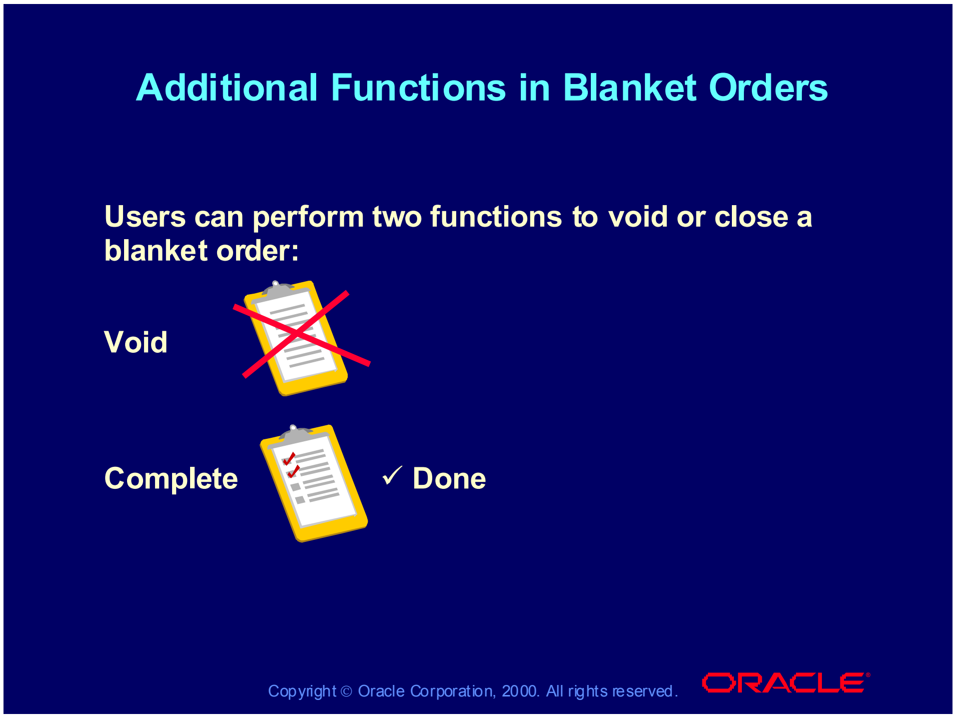
Blanket Order Statistics (continued)

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Blanket Sales Orders > Entering a Release Schedule

... > Creating/Copying a New BSO Procedure

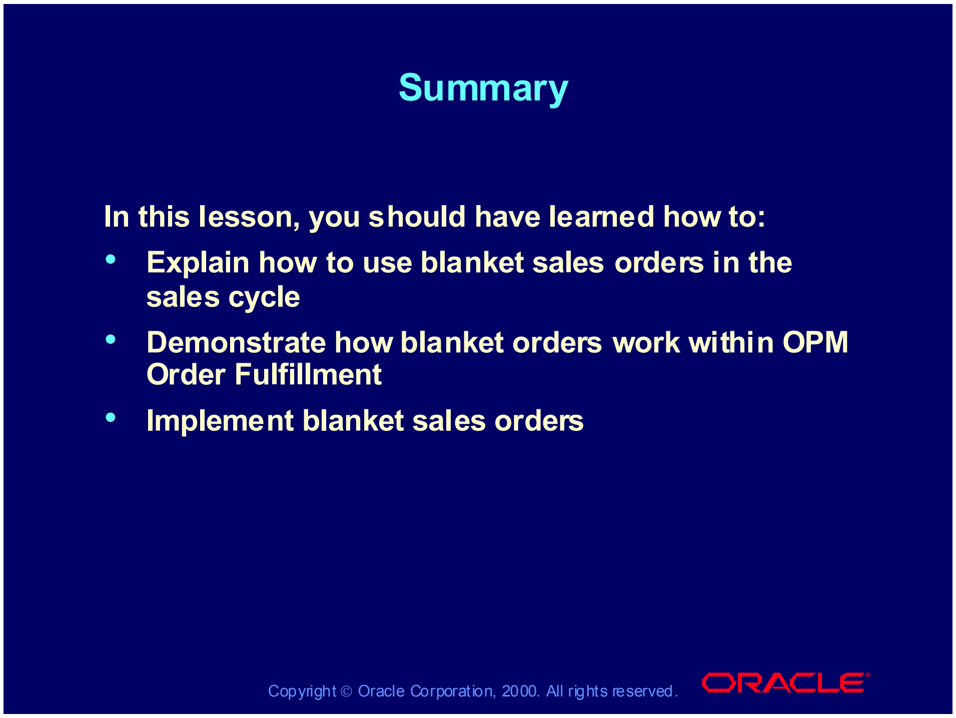
... > New Blanket Order Field Reference

Additional Functions in Blanket Orders



Voiding and Completing a Blanket Order

- Voiding a blanket order or order line prevents the blanket order from future release and marks it as Voided.
- Completing a blanket order or order line is similar to voiding; it prevents future release and marks the blanket as Closed.


Summary
In this lesson, you should have learned how to:
• Explain how to use blanket sales orders in the sales cycle
• Demonstrate how blanket orders work within OPM Order Fulfillment
• Implement blanket sales orders
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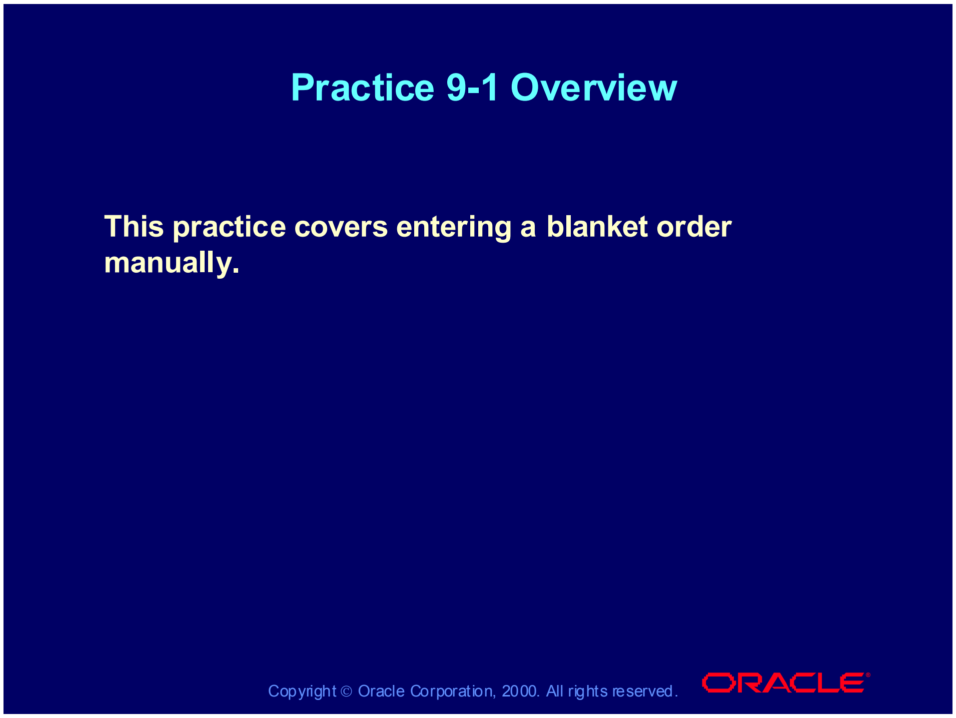
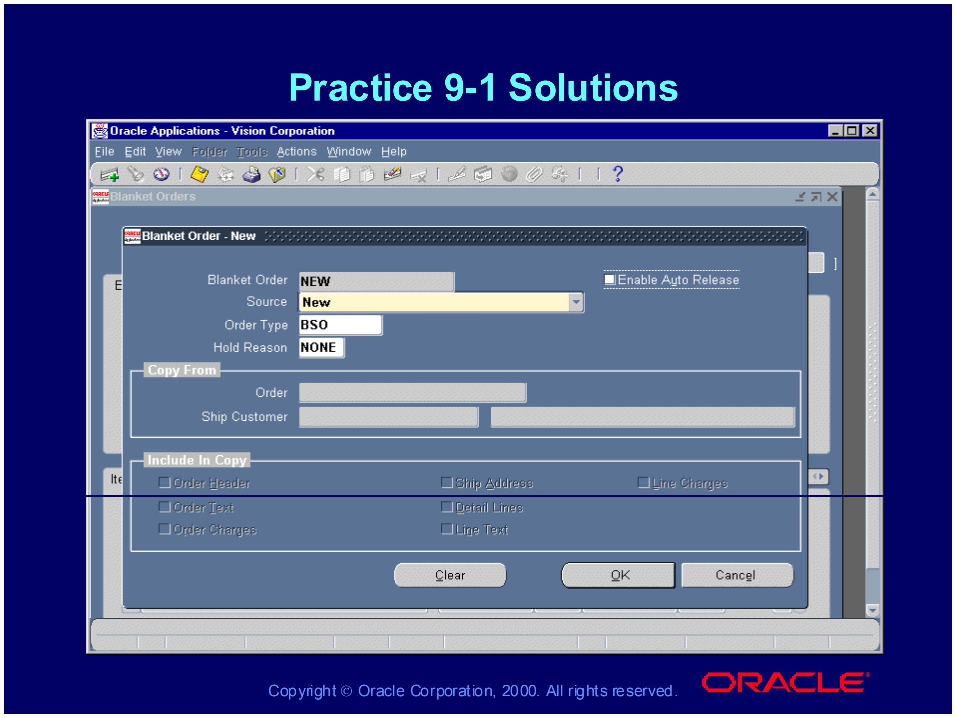
Practice 9-1 Overview



Scenario

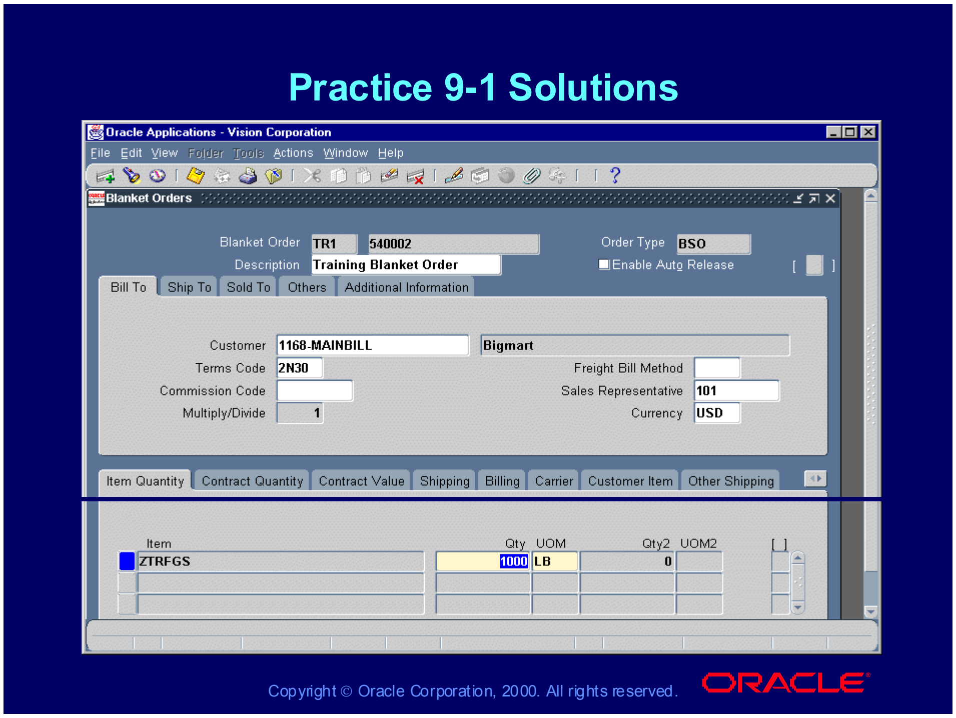
You want to release an order from a blanket sales order. Enter a manual blanket order, using an intermediate or finished product to ship.

Practice 9-1 Solutions



Creating a Blanket Sales Order

1. Navigate to OPM Order Fulfillment to create a blanket sales order.
   (N) OPM Logistics > Order Fulfillment > Blanket Sales Orders > Create
2. Select New from the list of values for the source field.
3. Select BSO as the Order Type from the list of values. This will default to all releases created from the BSO.
4. (Optional) Select a hold reason from the list of values. This will default to all BSO lines.
5. If you are generating a release schedule and will be automatically releasing against the BSO, you must select the Enable Auto Release box.
6. Click OK. The Blanket Orders window opens.



Creating a Blanket Sales Order (continued)

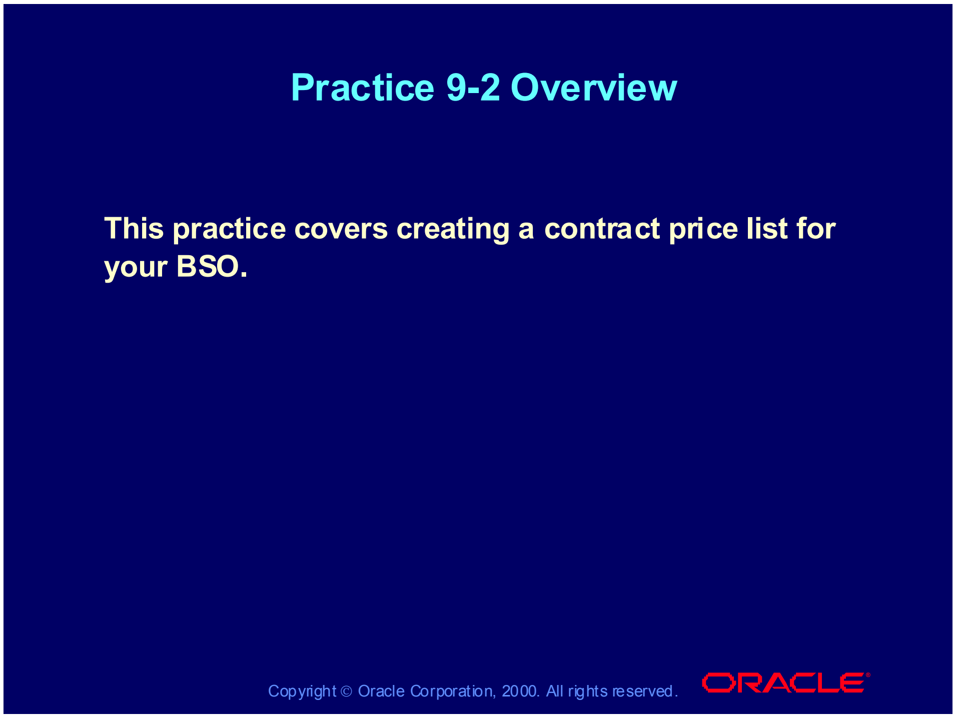
7. Enter a description of your BSO.
8. In the Bill To tabbed page, enter or select a customer. The other header information will be populated from the customer record. The commission code and freight bill method can be edited.
9. In the Ship To tabbed page, enter or select a customer if different from the customer specified in the Bill To tabbed page.
10. Enter the from warehouse from which material will be shipped.
11. In the Additional Information tabbed page, enter the maximum value of the BSO. The total of all releases and shipments cannot exceed this value.
12. Enter the start and end dates for which the BSO is effective.
13. In the Item Quantity tabbed page, select a finished good item beginning with ZTR% from the list of values and the quantity required. The unit of measure will default in from the item master.

    Note: The percent sign (%) is a wild-card character used to search a list of values.

Create a Blanket Sales Order (continued)

14. Enter the standard quantity that will default into each release.
15. In the Contract Quantity tabbed page, enter a minimum and maximum for the release quantities.
16. In the Contract Value tabbed page, enter the minimum and maximum for the release value.
17. In the Shipping tabbed page, change the from warehouse if different for this line item.
18. In the Carrier tabbed page, select an FOB code from the list of values.
19. Save your work. Make a note of the new BSO number:_____.
20. Click OK.

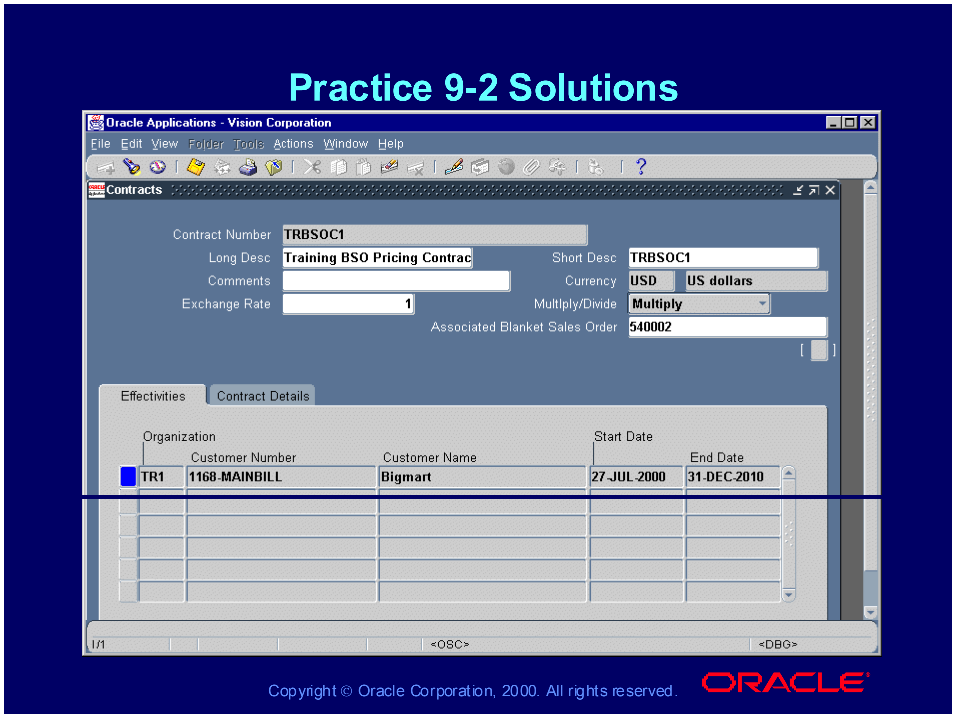
Practice 9-2 Overview



Scenario

In order to see the values updated on a blanket sales order, you must have a contract tied to the blanket order or a contract or price list for the customer or item.

Create a contract for the BSO created in practice 9-1.

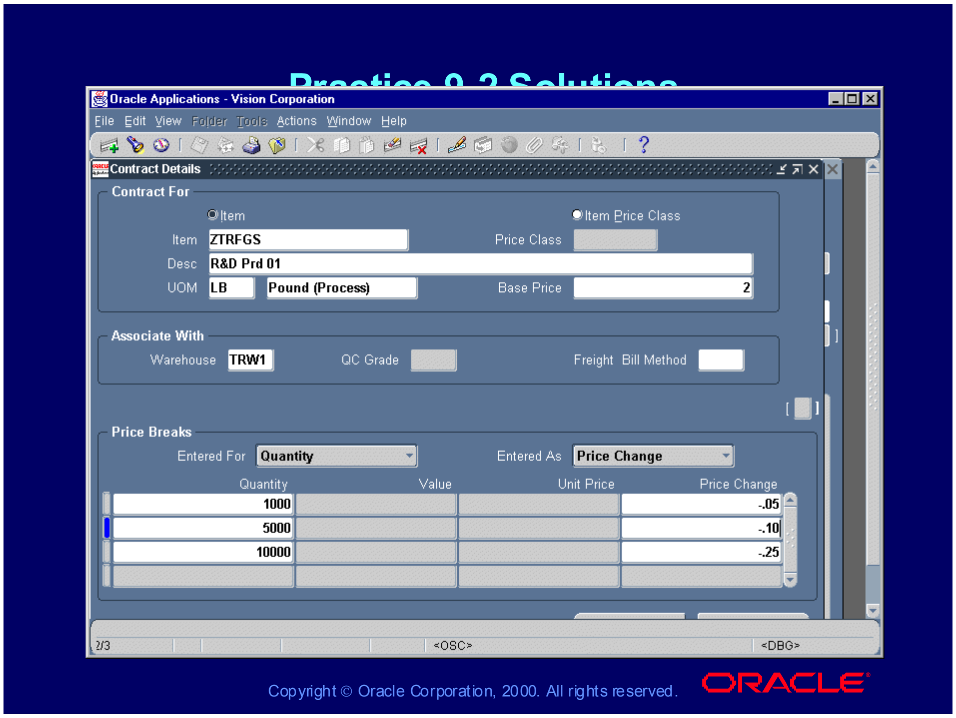


Creating a Contract for a BSO

1. Navigate to OPM Order Fulfillment to enter a contract for a blanket order.
   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Contracts
2. Enter a unique contract number. It can be alphanumeric.
3. Enter a full description for this contract.
4. Enter a short description that can be searched on.
5. Enter the currency type of this contract. The currency description will default in.
6. Enter an exchange rate for this BSO. If the contract currency is the same as the organization's default currency, enter `1` in this field.
7. Select Multiply or Divide if using a currency type other than the organizations default currency. Otherwise accept the default.
8. Select your BSO from the list of values.

Creating a Contract for a BSO (continued)

9. In the Effectivities tabbed page, select the highlighted character box or go to the Actions menu to enter the effectivity details of this contract.
   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Contracts
   (M) Actions > Add Effectivities
10. Select the appropriate option button if this effectivity is associated with all organizations or one specific organization. Your default organization will automatically default in. You may change the organization only to one that your user is associated with.
11. Enter the start and end dates for which this contract is effective. Select the check box to inactivate this contract.
12. (Optional) You can associate this contract to either a ship-to or bill-to address of a customer. You must specify the preference number for this contract regardless of address. If there is more than one contract for this customer, during the same time period, under the same organization, the system then uses the preference to determine which contract to choose.
13. Click OK. This brings you back to the Contracts window and populates the lines on the Effectivities tab.



Creating a Contract for a BSO (continued)

14. In the Contract Details tabbed page, select the highlighted character box or go to the Actions menu to enter the details of this contract.

    (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Contracts
    (M) Actions > Add Contracts

15. Select the Item or Item Price Class option button for which the contract is going to be defined.
16. Enter either the item or item price class code of this contract. The description will default in.
17. Accept or change the default UOM.
18. Enter a base price for the item. This price is what the item will be priced at if there are not price breaks defined.
19. (Optional) Enter any combination of warehouse, QC grade, or freight bill method to narrow the contract pricing requirements.

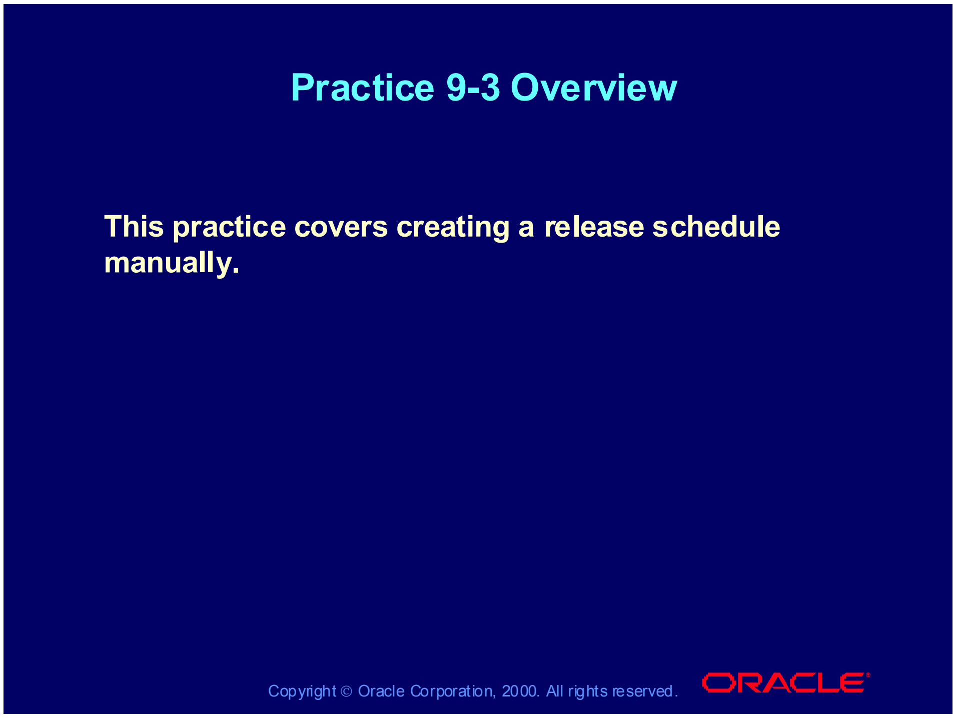
Creating a Contract for a BSO (continued)

20. Select the price break method on which this contract will be based.

Note: If the price break is entered as a percent change or price change as a discount off of the base price, enter the price break as a negative number. A positive percent or price change will add to the base price.

21. Click OK. This returns you to the Contracts window and populates the lines on the Effectivities tab.
22. Save your contract.

Practice 9-3 Overview

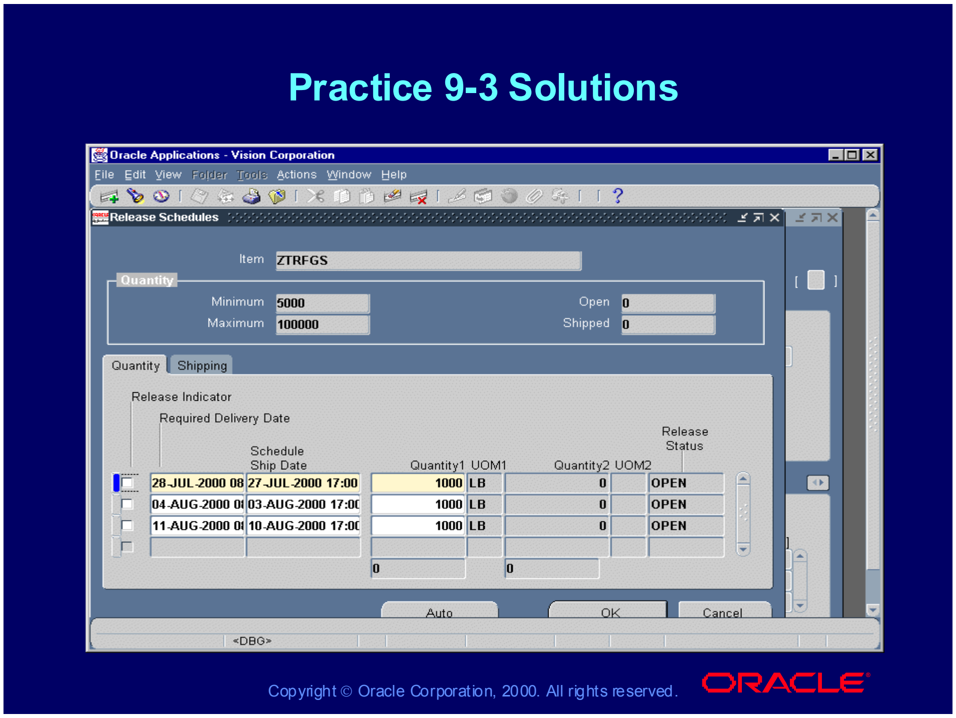


Scenario

You have a customer who requires delivery of a finished product at uneven intervals. Create a new BSO and contract and manually enter a release schedule off the following dates:

Required Delivery Date	Scheduled Ship Date	Quantity
June 3, 2000	June 1, 2000	5,000 lb
June 20, 2000	June 17, 2000	5,000 lb
July 3, 2000	July 1, 2000	5,000 lb
July 24, 2000	July 21, 2000	5,000 lb
August 15, 2000	August 12, 2000	5,000 lb
September 5, 2000	September 2, 2000	10,000 lb
October 3, 2000	October 30, 2000	10,000 lb

Practice 9-3 Solutions



Manually Creating a Release Schedule

1. Navigate to OPM Order Fulfillment to create a blanket sales order.

   (N) OPM Logistics > Order Fulfillment > Blanket Sales Orders > Create

2. Complete creating a BSO, using the procedures followed in practice 9-1.

3. Navigate to OPM Order Fulfillment to enter a contract for a blanket order.

   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Contracts

4. Complete creating a contract for the new BSO, using the procedures followed in practice 9-2.

5. Manually create a release schedule for a new BSO.

   (N) OPM Logistics > Order Fulfillment > Blanket Sales Orders > Open

6. Find your new BSO.

Manually Creating a Release Schedule (continued)

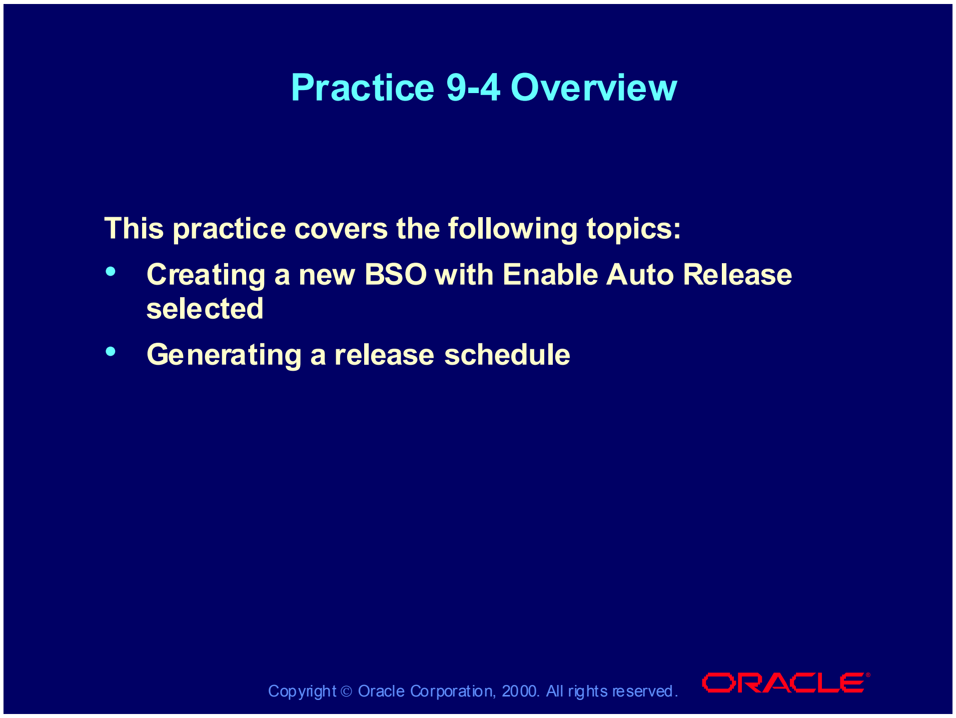
7. To manually create a release schedule, either select the highlighted character box next to your item (the release schedule window will open automatically) or move your cursor to the item field and open the release schedule from the Actions menu.

   (N) OPM Logistics > Order Fulfillment > Blanket Sales Orders > Open (M) Actions > Release Schedule
8. Enter your release schedule.

Note: Before you click OK, the expected net price will not change until the release schedule is saved.

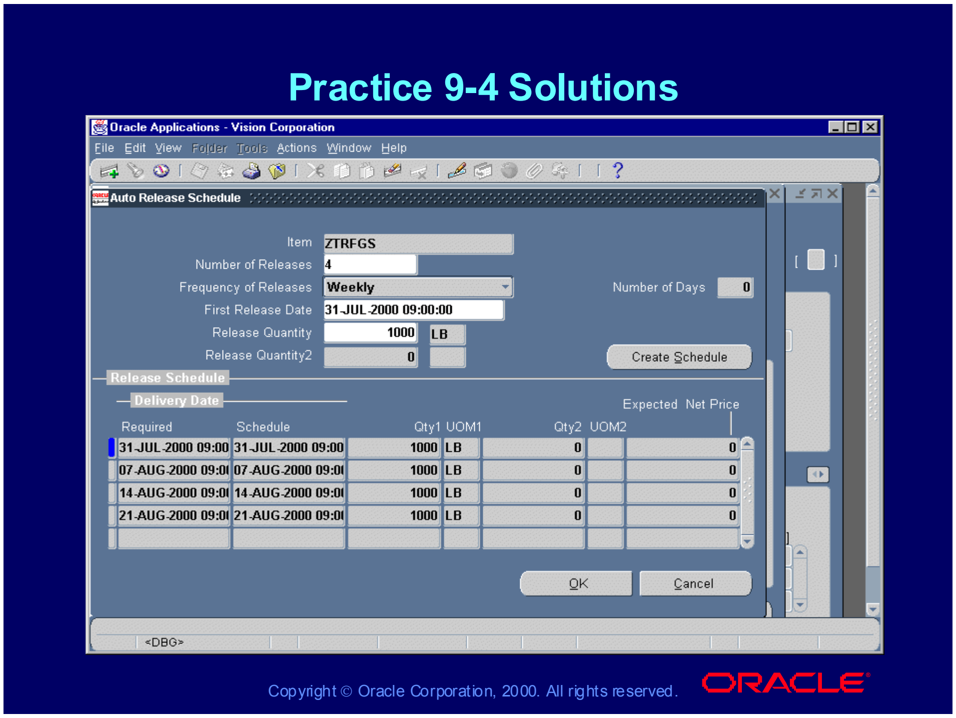
9. Click OK. This returns you to the Blanket Orders window.
10. Select the highlighted character box next to your item to review the release schedule. Note that the expected net price has changed.
11. Save your release schedule.

Practice 9-4 Overview



Scenario

Create a new BSO with the Enable Auto Release check box selected, create a new contract, and automatically create a release schedule by using this new blanket order.



Automatically Creating a Release Schedule

1. Navigate to OPM Order Fulfillment to create a blanket sales order.

   (N) OPM Logistics > Order Fulfillment > Blanket Sales Orders > Create

Note: If you are generating a release schedule and will be automatically releasing against the BSO, you must select the Enable Auto Release check box before entering your line detail.

2. Complete creating a BSO, using the procedures followed in practice 9-1.
3. Navigate to OPM Order Fulfillment to enter a contract for a blanket order.

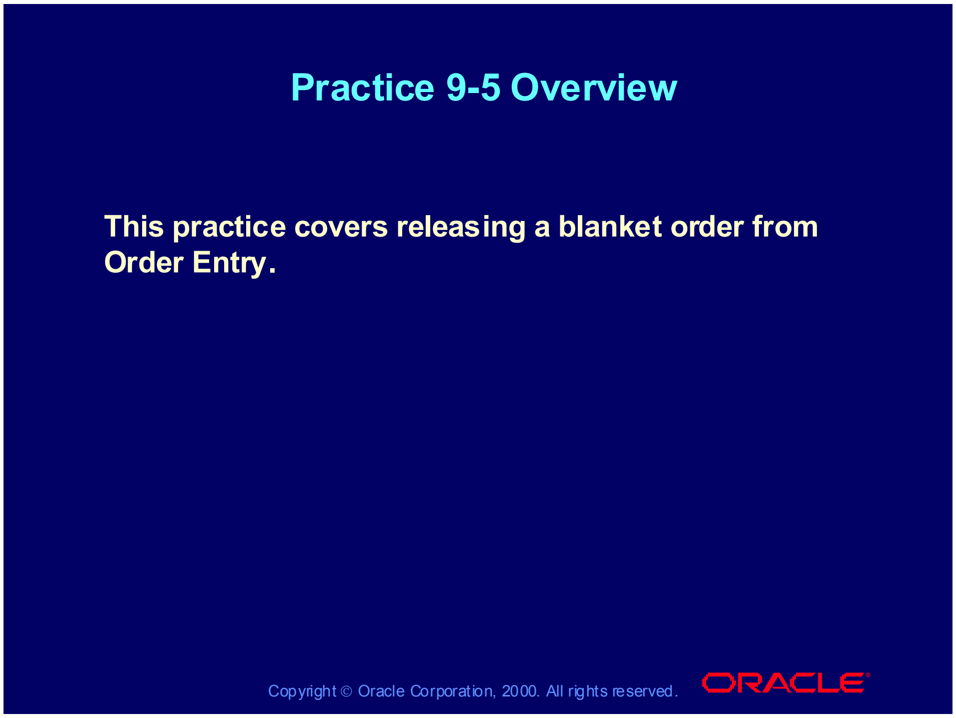
   (N) OPM Logistics > Order Fulfillment > Setup > Pricing > Contracts
4. Complete creating a contract for the new BSO, using the procedures that you followed in practice 9-2.
5. Open your new BSO.

Automatically Creating a Release Schedule (continued)

6. To generate a release schedule, either select the highlighted character box next to your item (the release schedule window will open automatically) or move your cursor to the item field and open the release schedule from the Actions menu.

   (N) OPM Logistics > Order Fulfillment > Blanket Sales Orders > Open (M) Actions > Release Schedule (B) Auto
7. Click the Auto button. A Caution window opens with the message Confirm Mark for Delete. Click OK. This deletes the release line from the Release Schedules window and opens the Auto Release Schedule window.
8. Enter the number of releases that you want to create for this schedule.
9. Select the Frequency of Release drop-down list.
10. Accept or edit the first release date.
11. Accept the standard release quantity.
12. Click the Create Schedule button.
13. Click OK to accept the generated schedule. This returns you to the Release Schedules Window.
14. Click OK in the Release Schedules Window.
15. Save your work.

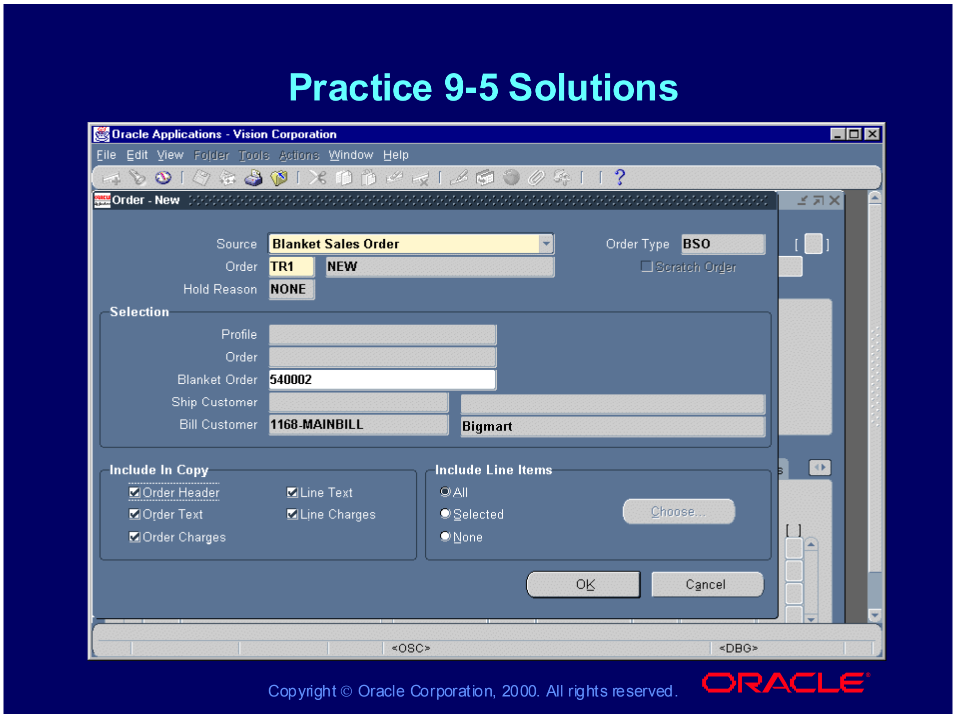
Practice 9-5 Overview



Scenario

Create a release from your first blanket sales order, using a standard sales order. Use the BSO that you created in practice 9-1.

Practice 9-5 Solutions



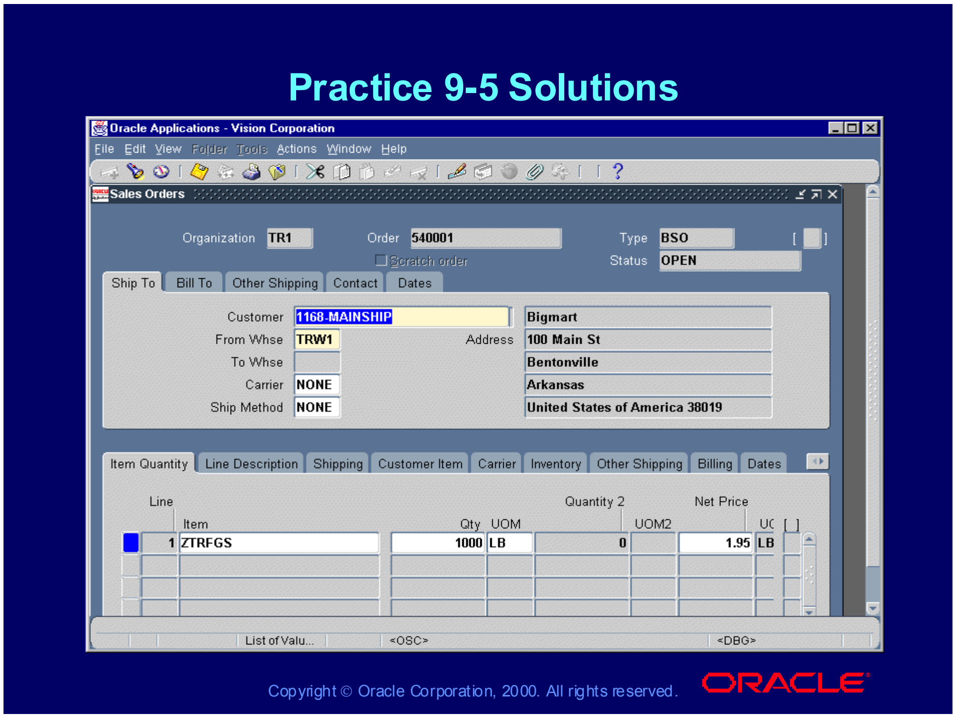
Releasing from a BSO by Using a Sales Order

1. Navigate to OPM Order Fulfillment Sales Orders to release against a BSO.

   (N) OPM Logistics > Order Fulfillment > Sales Orders > Create

2. In the Create Sales Order window, select Blanket Sales Order as the Source. Press the [Tab] key. The system automatically takes you to the Blanket Order field.
3. Select your first blanket order created from the list of values.
4. Accept all other defaults.
5. Click OK.

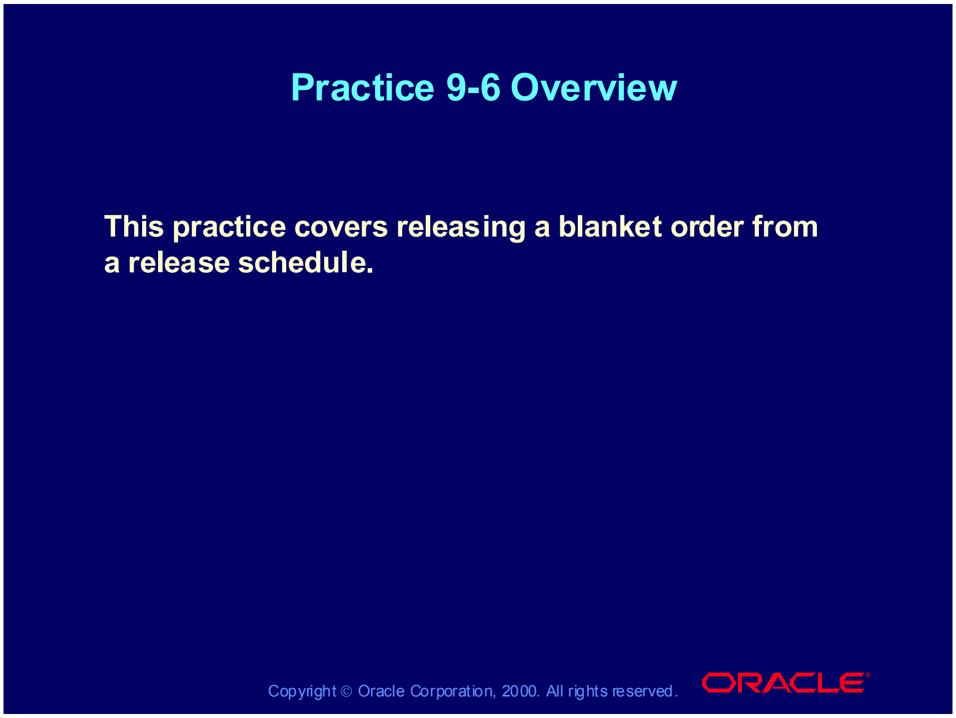
Practice 9-5 Solutions



Releasing from a BSO by Using a Sales Order (continued)

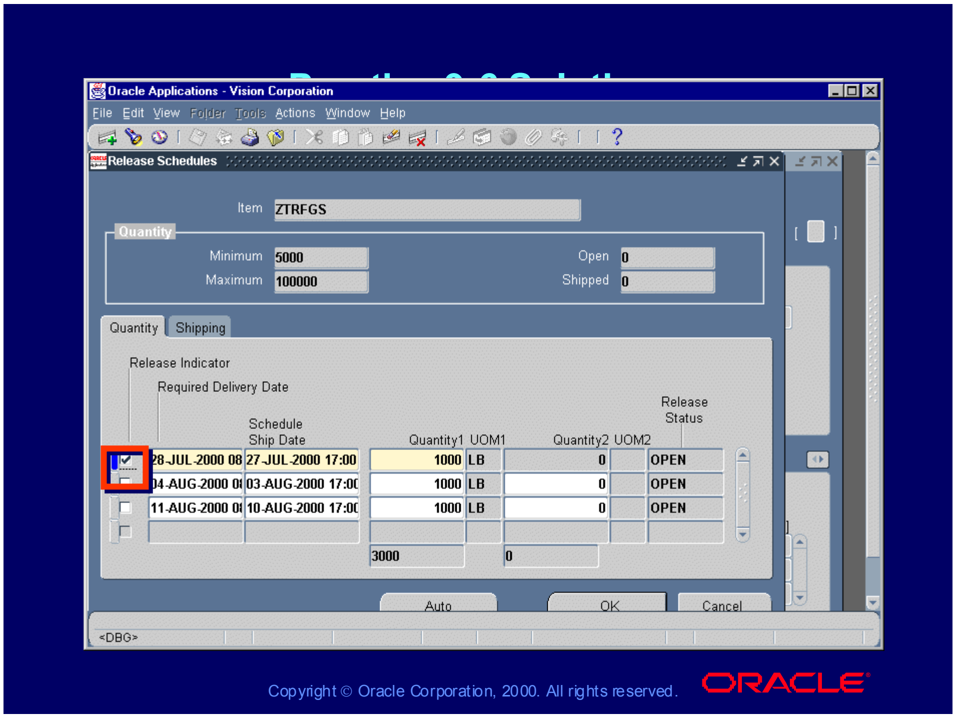
6. A new sales order will be created. Make note of the new number: __________.
7. Review the details.
8. Save your work.

Practice 9-6 Overview



Scenario

Release a line from the BSO that you created in practice 9-3.

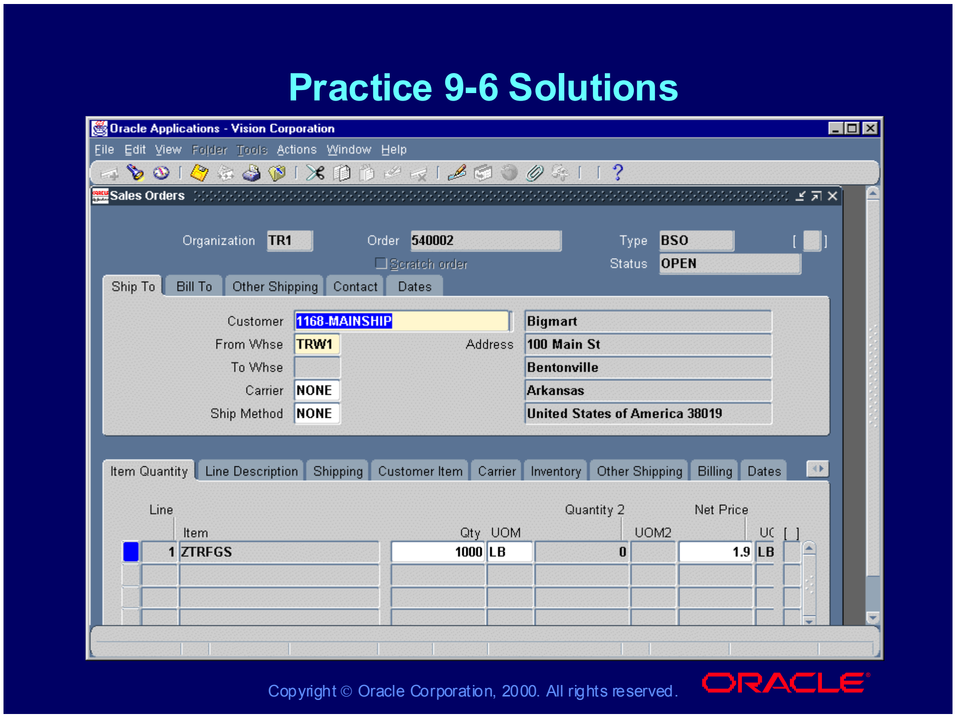


Releasing a BSO from a Release Schedule

1. Navigate to OPM Order Fulfillment to release against a BSO from a manually created release schedule.

   (N) OPM Logistics > Order Fulfillment > Blanket Sales Orders > Open (M) Actions > Release Schedule
2. Find the second BSO that you created.
3. Select the highlighted character box next to your item. (The Release Schedules window opens automatically.)
4. Select the Release Indicator check box next to the line or lines on the schedule that you are releasing.
5. Click OK. The Release Schedules window closes.
6. Save the order.

Practice 9-6 Solutions



Releasing a BSO from a Release Schedule (continued)

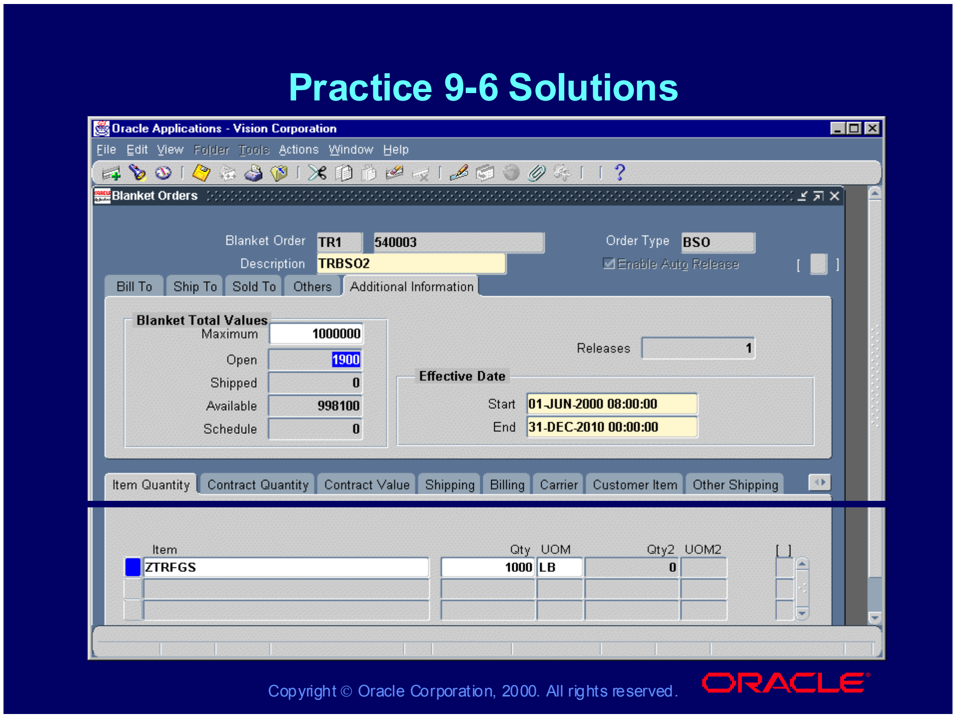
7. A new sales order will be created. Note the new number: _____________.

Note: When you save the order, one or more sales orders will be created for the release schedules. One sales order will be created with all of the checked lines if the profile option GML : Number of Sales Orders Per BSO Release is set to 0. If this profile value is set to 1, then separate sales orders will be created for each release schedule line.

8. Navigate to OPM Order Fulfillment Sales Orders to review new sales orders.

   (N) OPM Logistics > Order Fulfillment > Sales Orders > Open

Practice 9-6 Solutions



Releasing a BSO from a Release Schedule (continued)

9. Navigate to OPM Order Fulfillment to review the blanket sales order values.

   (N) OPM Logistics > Order Fulfillment > Blanket Sales Orders > Open (T) Additional Information

Practice 9-7 Overview

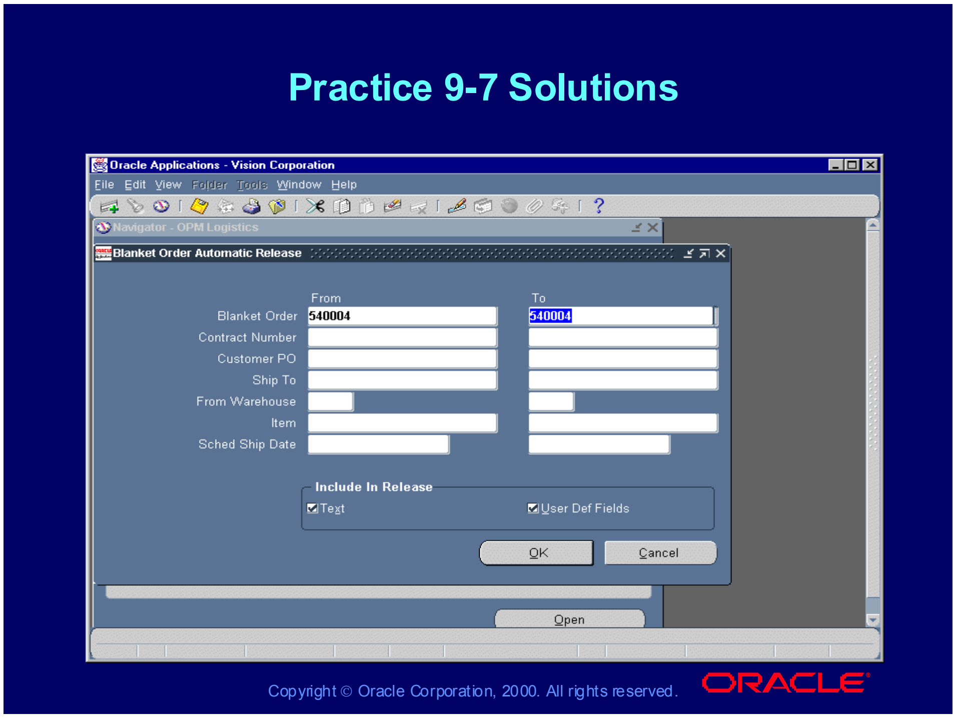
Practice 9-7 Overview

This practice covers automatically releasing a blanket order.

Scenario

Use the automatic release feature to create a release from your third blanket order.

Use the BSO that you created in practice 9-4.



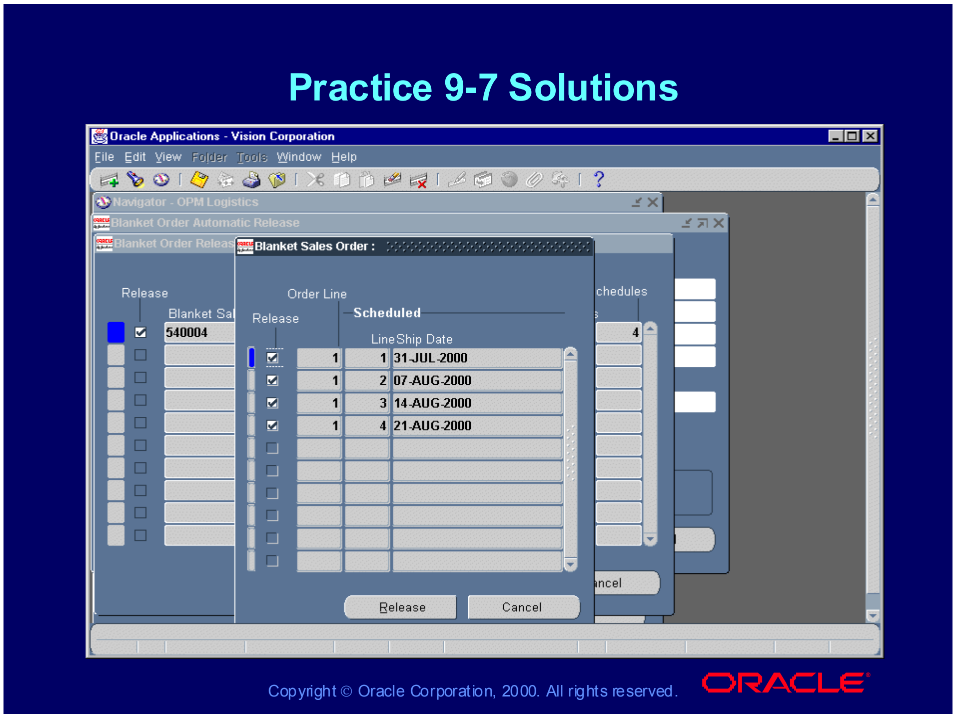
Automatically Releasing from a Blanket Sales Order

1. Navigate to OPM Order Fulfillment to automatically release against a BSO.

   (N) OPM Logistics > Order Fulfillment > Blanket Sales Order > Auto Release

2. Select the third blanket order created in the From and To fields. You can use the Blanket Order Automatic Release window to release several blanket orders at once. Release schedules must exist for any blankets to be released.

3. Click OK. The Blanket Order Release Query Results window opens.



Automatically Releasing from a Blanket Sales Order (continued)

4. Select the highlighted character box next to the line you are releasing to select or deselect the lines to be released.
5. Click Release.
6. A new sales order will be created. Note of the new number: ___________.
7. Navigate to OPM Order Fulfillment Sales Orders to review new sales orders.

   (N) OPM Logistics > Order Fulfillment > Sales Orders > Open

Managing Shipments

Chapter 10


10
Managing Shipments
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Objectives

Lesson Topics

This lesson describes the procedures you use to create a new shipment based on a wide variety of criteria, and to enter a back order when you do not have enough stock to fill a sales order shipment line completely.

Creating a New Shipment

Overview

Your first step in creating a shipment is to select the sales order line items to be included in it. After specifying the warehouses from which to ship the goods, you can restrict the shipment to all orders scheduled for shipping within a specified date range or on a single date.

You can also restrict the shipment to items from a specific sales order, orders shipped by a specific carrier or shipping method, or orders for items in a specific shipping class.

Selecting Customer Carriers

If you specified a range of customers for open orders in the Shipment Selections dialog box, there is a good possibility that more than one carrier was associated with that range of customers. Shippers are linked to customers in the Customer window.

The Customer Carrier Selections dialog box displays a list of all carriers found on the selected order lines based on the criteria in the Shipment Selections dialog box. The shipping method used by each carrier is also indicated.

Selecting Customer Carriers (continued)

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Shipment > Creating New Shipments

... > Creating New Shipments Procedure

... > Shipment Selections Field Reference

Selecting Shipping Lines

Selecting Shipping Lines

Use the Shipping Lines window to:

- Select the lines from one or more sales orders to be shipped
- Enter the shipping quantities for each line being shipped

(N) OPM Logistics > Order Fulfillment > Shipments > Shipments
(M) Actions > Line Items

Selecting Shipping Lines

The Shipping Lines window displays all of the order line items that meet the criteria that you specified in the Shipment Selections dialog box. You may include all of these lines in the shipment or edit and delete specific lines.

You can ship one or all lines complete, or ship a line short and back-order it. Entering back orders is discussed later in this lesson. In this window you can edit the Ship Quantity and Warehouse fields for each shipment line displayed. You can also edit these fields in the Shipping Lines Detail window.

The scheduled ship date and ship-to customer from the sales order appear at the bottom of the window for each shipment line selected.

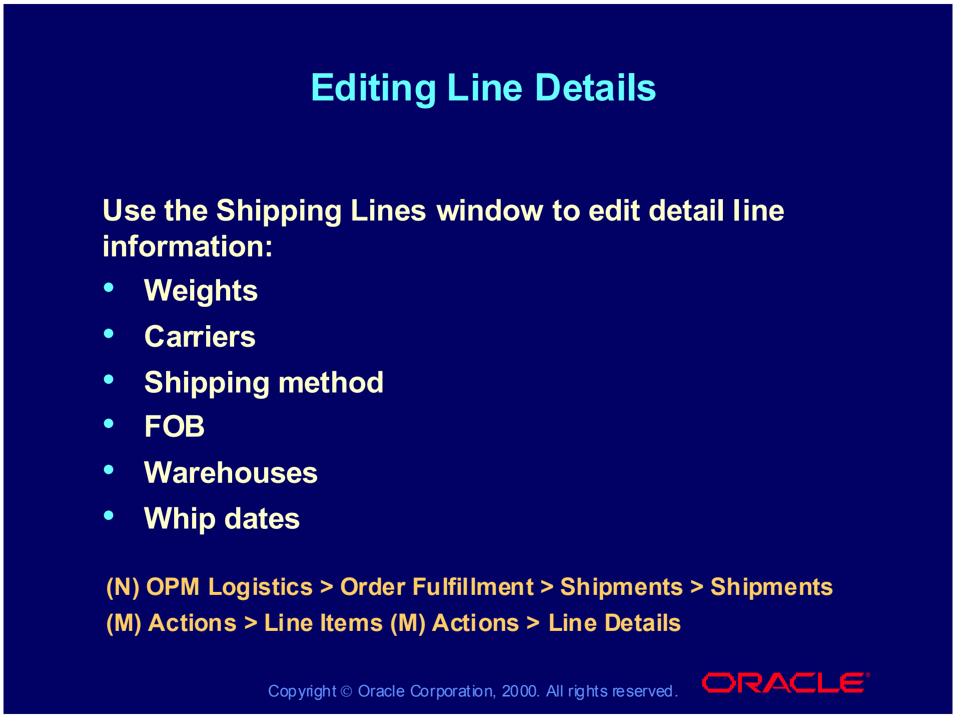
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Shipment > Selecting and Editing Shipping Lines

... > Selecting and Editing Shipping Lines Procedure

... > Shipping Lines Field Reference

... > Shipping Lines - Actions Menu Options

Editing Line Details



Editing Shipment Line Details

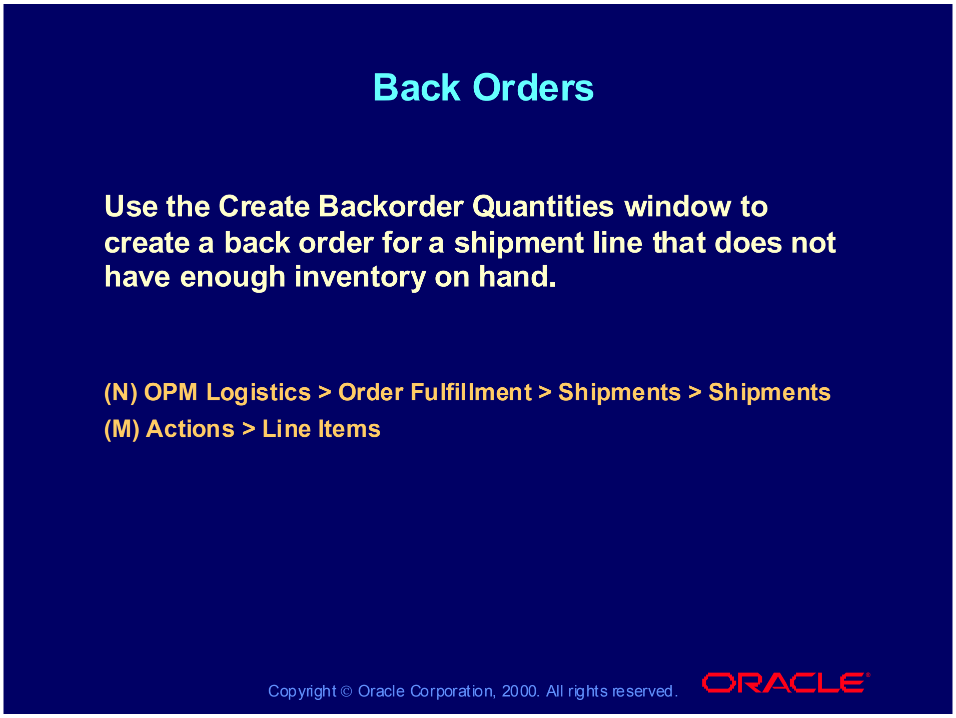
This window contains details for the line that you highlighted in the Shipping Lines window. You can edit this information from the sales order until the shipment line is released. Information fields that you can edit include Net weight, Tare weight, Pallet weight, Freight Bill weight, Ship weight, Ship Volume, Carrier Code, Shipping Method, From Warehouse, To Warehouse, FOB Code, Requested to Ship date, Promised to Ship date, and Schedule to Ship date.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Shipment > Entering Shipping Line Details

... > Entering Shipping Line Details Procedure

... > Shipping Line Field Reference

... > Shipping Lines - Actions Menu Options



Overview of Back Orders

When you do not have enough stock to fill a sales order shipment line completely, you can ship the available stock and then create a back order for the balance of the order line quantity. When you later purchase or produce sufficient stock to fill the balance of the order line, you can create a new shipment to satisfy the line shipment requirements.

Note: The back order flag in the Customer window must be set for back orders to be allowed for the shipment customer.

Example:

Assume that you have a sales order line item for 200 units of an item. When you open the Shipping Lines window, the order quantity becomes the default shipping quantity for the shipment line.

Before trying to fill the shipment, check the inventory summary by selecting Inventory Summary from the Special menu to confirm that you have enough stock in the designated shipping warehouse to fill the shipment. If, for example, you have 100 of the item available, you can ship the available 100 and then create a back order for the remaining 100.

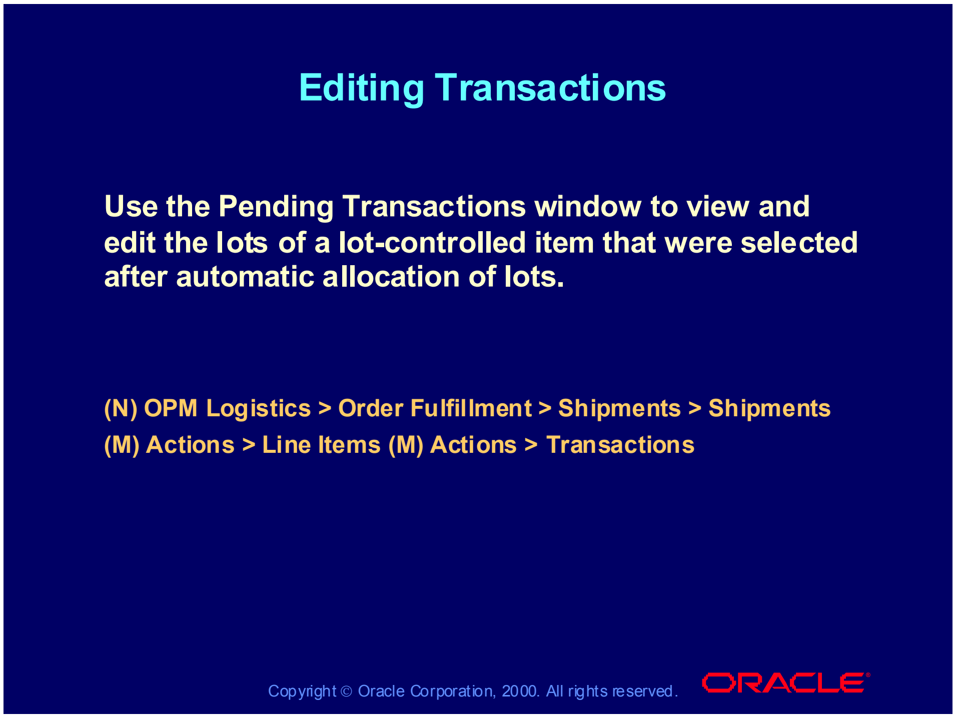
Overview of Back Orders (continued)

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Shipment > Creating New Shipments

... > Creating New Shipments Procedure

... > Shipment Selections Field Reference

Editing Transactions



Editing Transactions

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Shipment > Entering Pending Transactions

... > Entering Pending Transactions Procedure

... > Pending Transactions Field Reference

Viewing Shipping History

Shipping History

Your first step in creating a shipment is to select the sales order line items to be included in it. After specifying the warehouses from which to ship the goods, you can restrict the shipment to all orders scheduled for shipping within a specified date range or on a single date.

You can also restrict the shipment to items from a specific sales order, orders shipped by a specific carrier or shipping method, or orders for items in a specific shipping class.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Sales Orders > Creating a New Sales Order > Sales Orders Line Level - Actions Menu Options

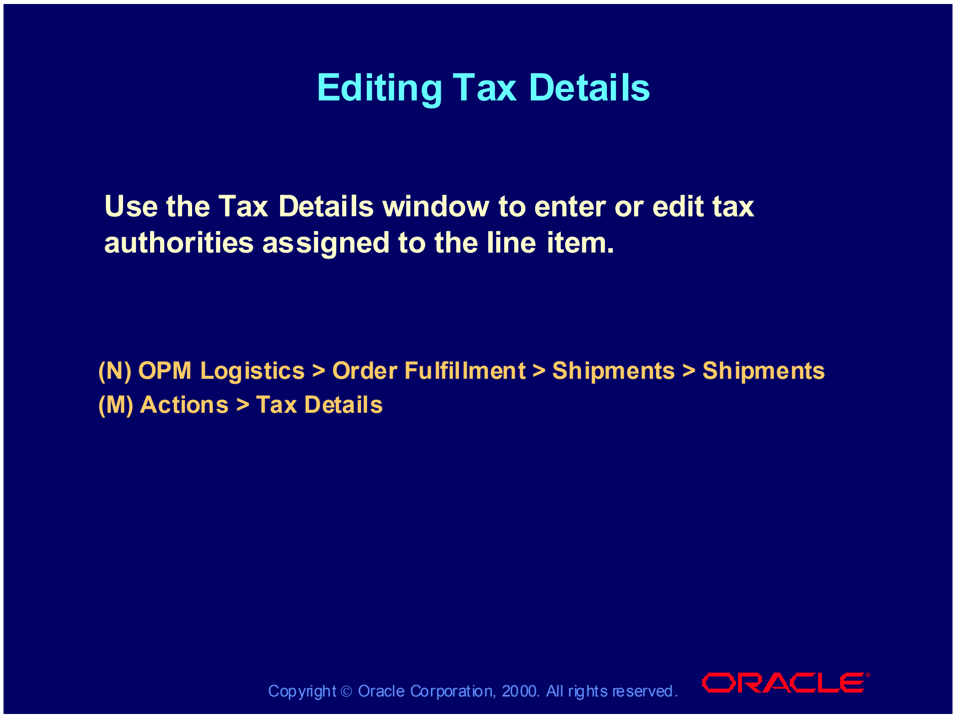
Inventory Summary

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Inventory > OPM Inventory Management > Inventory Inquiries > Displaying an Inventory Summary

... > Displaying an Inventory Summary Procedure

... > Inventory Summary Field Reference

Editing Tax Details



Editing Tax Details

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User’s Guide > Shipment > Entering Shipping Line Details > Shipping Lines - Actions Menu Options

Selecting Pick Lots

Selecting Pick Lots

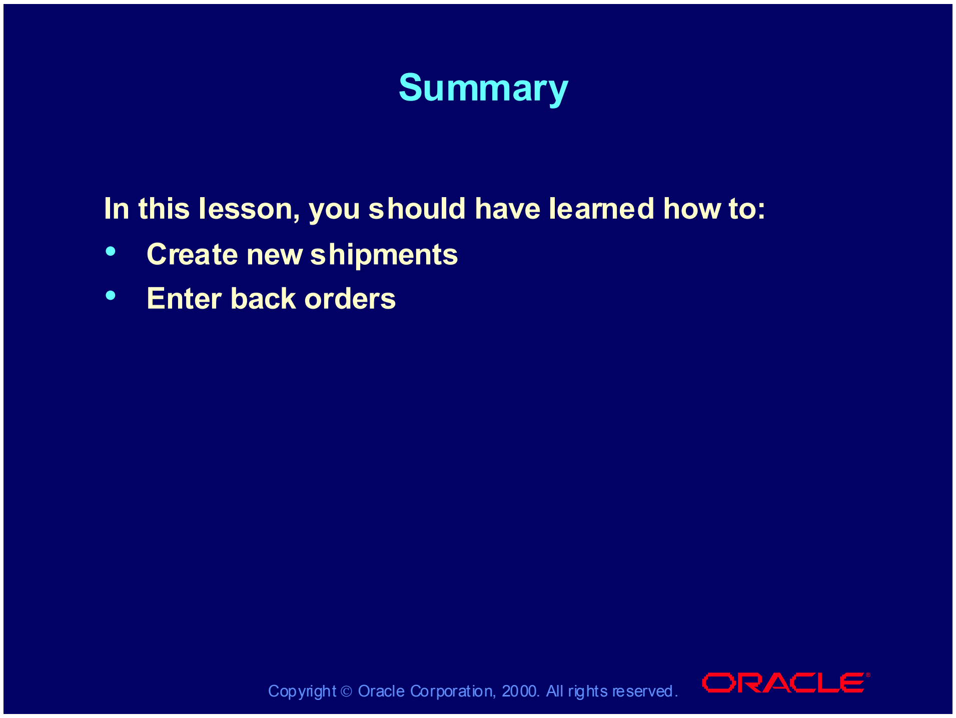
(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Logistics > OPM Order Fulfillment User's Guide > Shipment > Selecting and Editing Shipping Lines

... > Selecting and Editing Shipping Lines Procedure

... > Shipping Lines Field Reference

... > Shipping Lines - Actions Menu Options

Summary



Summary
In this lesson, you should have learned how to:
• Create new shipments
• Enter back orders
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Practice 10-1 Overview

Practice 10-1 Overview

This practice covers the following topics:

- Creating a new shipment
- Entering a back order

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Scenario

With your sales orders now in place and inventory in the warehouse, you are ready to make your first shipment.

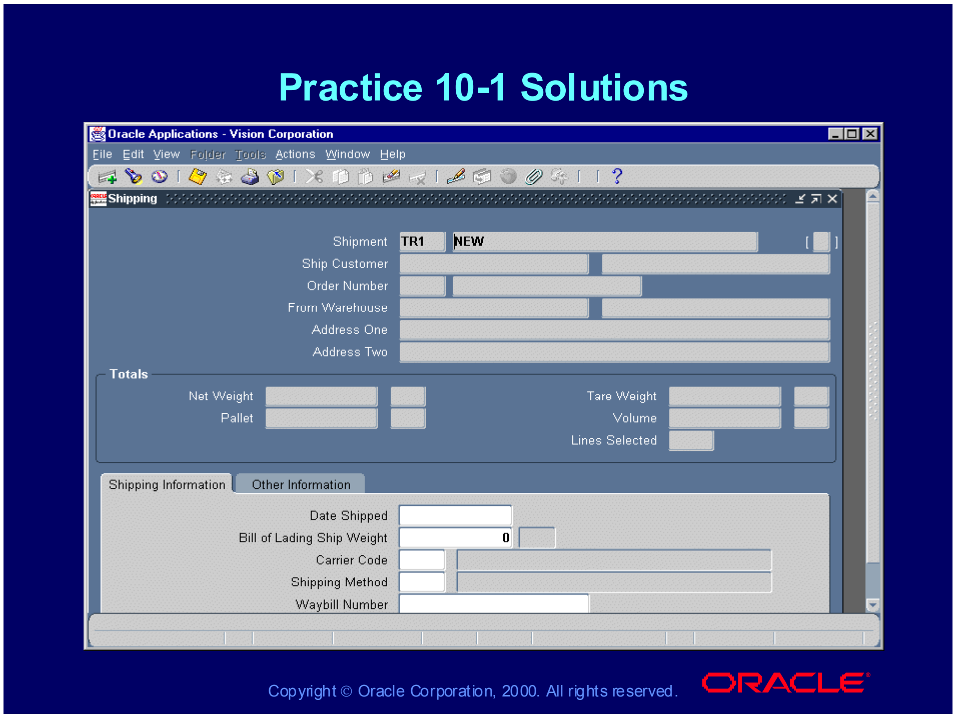
Creating and Releasing a Shipment with a Back Order

1. Create a shipment for one of your sales orders created in the previous exercise.
2. In the Shipment Selections dialog box, you can enter the criteria that limit the open line items to include in the shipment you are creating, or leave the fields blank to include all open line items.
3. If necessary, select a desired carrier for this shipment from the Customer Carrier Selections window.
4. Create a back order by entering a quantity less than the original ordered quantity for one of your line items.
5. You may enter any additional optional information in the Shipping Information region, such as Waybill Number and Trailer Number.
6. Enter any additional optional information in the Other Information region, such as Embark Port, Debark Port, Drop-off Time, and Pickup Time.

Creating and Releasing a Shipment with a Back Order (continued)

7. Save the shipping window and note the shipment number.
8. Enter the shipment number in the Shipment field and release the shipment.

Practice 10-1 Solutions

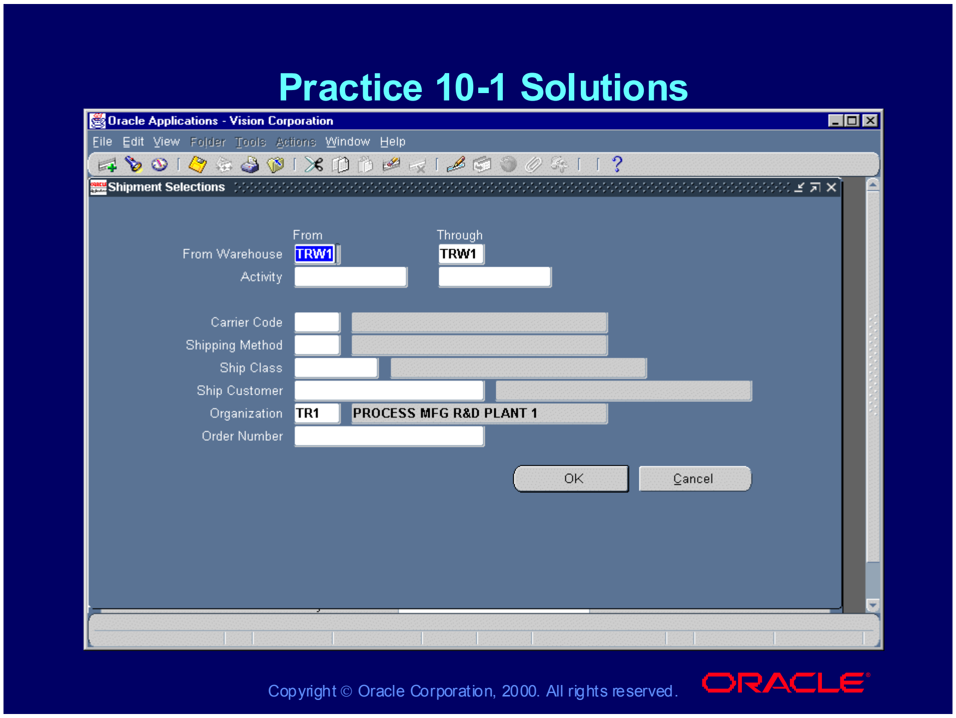


Creating and Releasing a Shipment with a Back Order

1. Navigate to the Shipping window.

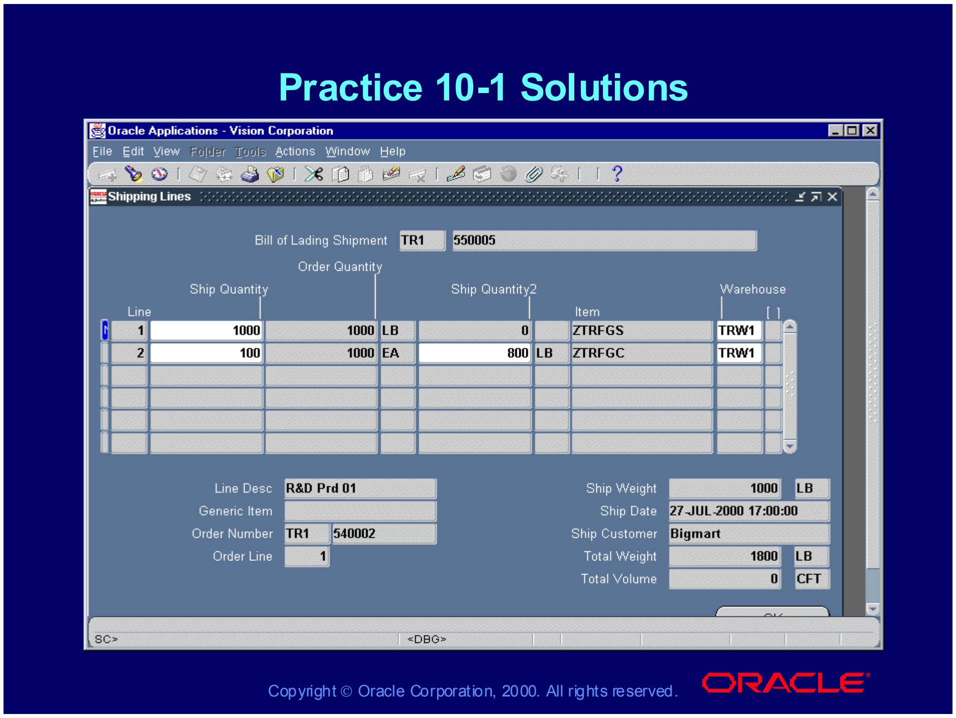
   (N) OPM Logistics > Order Fulfillment > Shipments > Shipments

2. Press [Tab]. The Shipment Selections window appears.



Creating and Releasing a Shipment with a Back Order (continued)

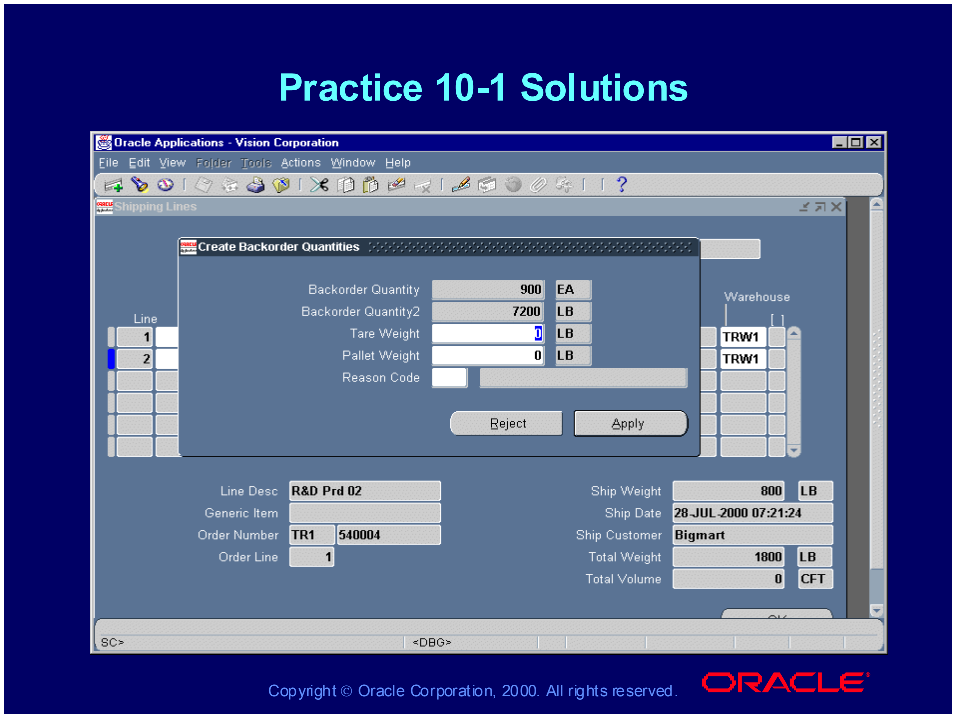
3. You can enter your warehouse and any other criteria that you want to use to determine which open line items to include in your shipment, or leave the fields blank to include all open line items.
4. Click the OK button.



Creating and Releasing a Shipment with a Back Order (continued)

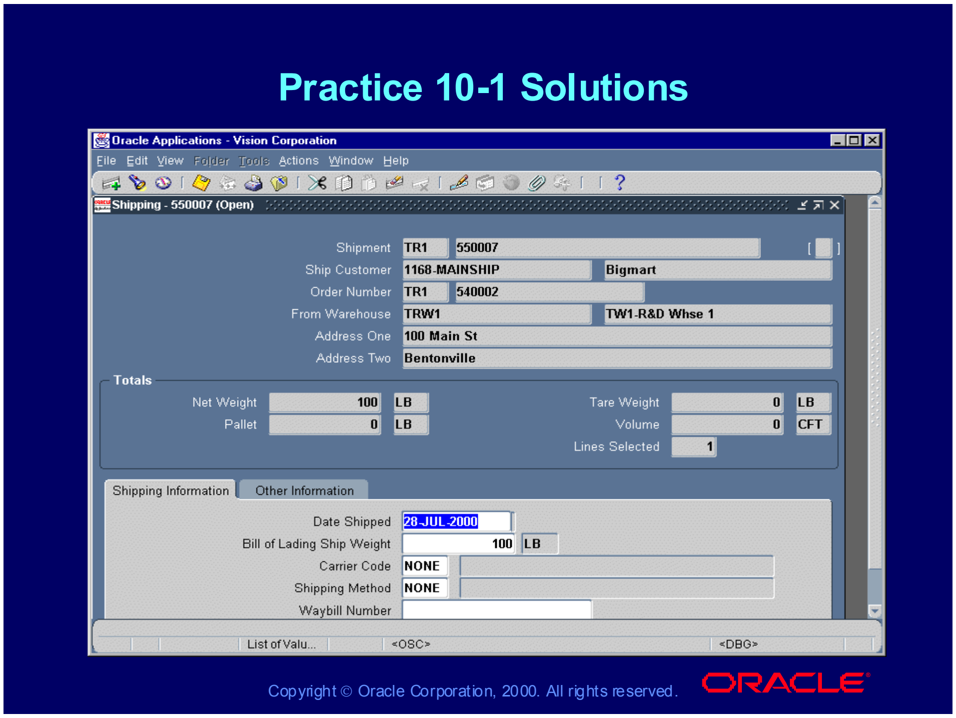
5. If more than one carrier was associated with the range of ship-to customers in the search, the Customer Carrier Selections window appears. Select the desired carrier for this shipment.
6. Click the OK button.
7. The Shipping Lines window appears, displaying all of the order line items that meet the criteria that you specified in the Shipment Selections window. Edit one of the ship quantities to a quantity less than the original ordered quantity.
8. Click the OK button.

Practice 10-1 Solutions



Creating and Releasing a Shipment with a Back Order (continued)

9. The Create Backorder Quantities window appears with the calculated back order quantity. Click the Apply button to create the back order.
10. The Shipping Lines window appears. Click the OK button. The Shipping window appears.
11. Enter any additional optional information in the Shipping Information tab, such as Waybill Number and Trailer Number.
12. Select the Other Information tab and enter any additional optional information, such as Embark Port, Debark Port, Drop-off Time, and Pickup Time.
13. Save the Shipping window and note the shipment number assigned by the system.



Creating and Releasing a Shipment with a Back Order (continued)

14. Enter the shipment number in the Shipment field.
15. Enter the date shipped in the Shipping Information tabbed page.
16. Select Release Shipment from the Actions menu to release the shipment.
17. Select Save from the Edit menu to save it.

Generating Standard Reports and Inquiries

Chapter 11

11

Generating Standard Reports and Inquiries

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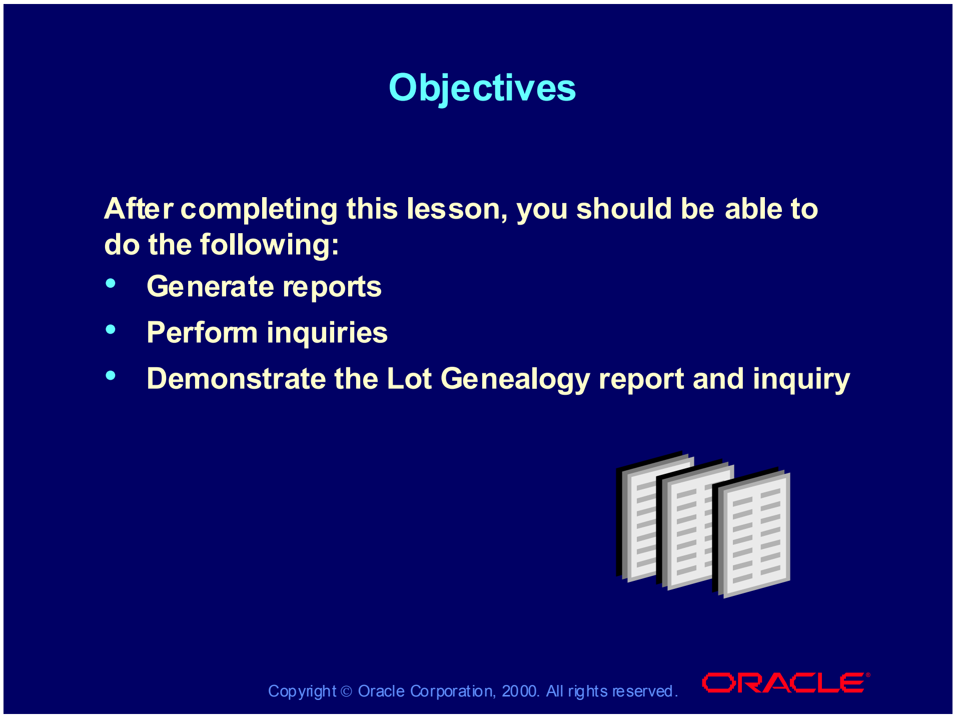
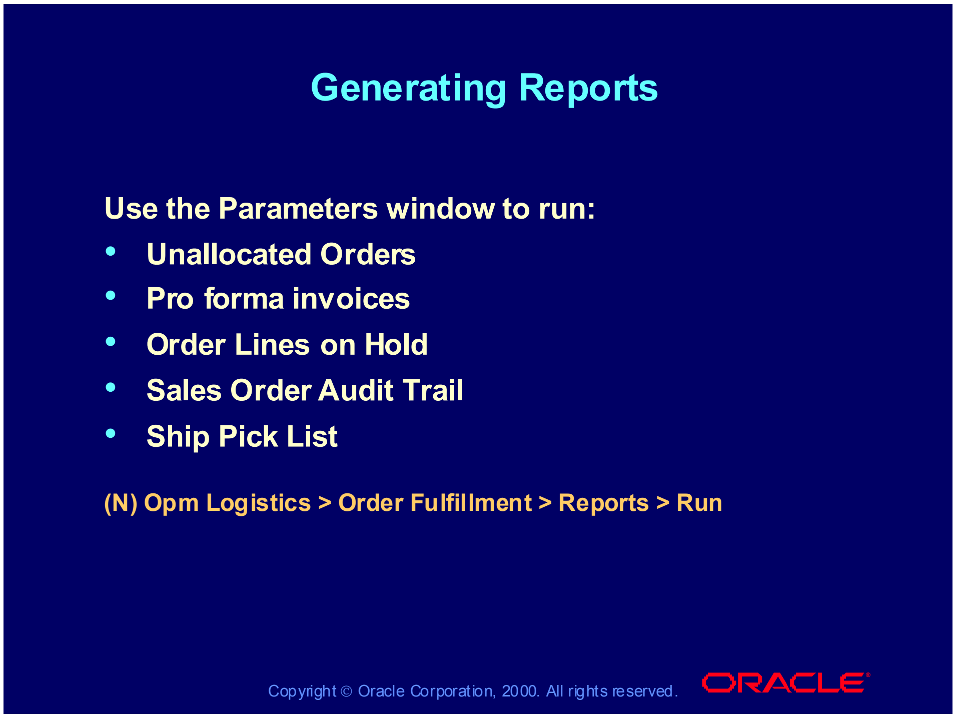
Objectives



Lesson Topics

This lesson describes the various standard reports already formatted in the Oracle Process Manufacturing (OPM) Order Fulfillment module. For each report you can specify restriction criteria to limit the report to the information that you desire. The new Lot Genealogy report and inquiry will be demonstrated.



Unallocated Orders Report

You can generate the Unallocated Orders Report to list sales orders for which inventory allocations have not yet been performed. You can restrict the report to unallocated orders for specific ship-to customers, items, or warehouses.

Pro Forma Invoices

You can generate a pro forma invoice, which is a shipping document used in the international environment. You can optionally restrict print to invoices for a specific range of sales orders, customers, shipments, and carriers.

Order Lines on Hold Report

You can generate the Order Lines on Hold Report to list all sales orders that have been placed on hold. You can restrict the report to orders placed on one or more specific type of hold.

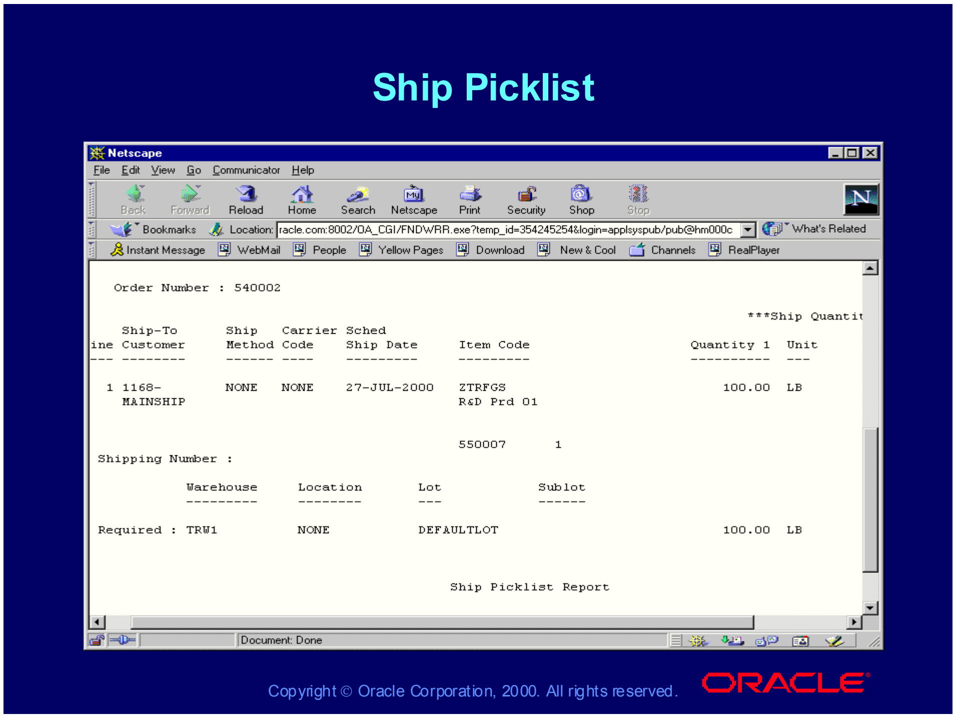
Sales Order Audit Trail Report

You can generate the Sales Order Audit Trail Report to list all sales order changes recorded for the range of orders that you specify. You can restrict the list to a range of orders or orders for a range of ship-tos, inventory items, operators, or order change dates.

Sales Order Audit Trail Report (continued)

Note: The Log Audit Trail flag must be activated in the Order Types window for the audit to be generated. Only order types with the flag turned on are included in the report.

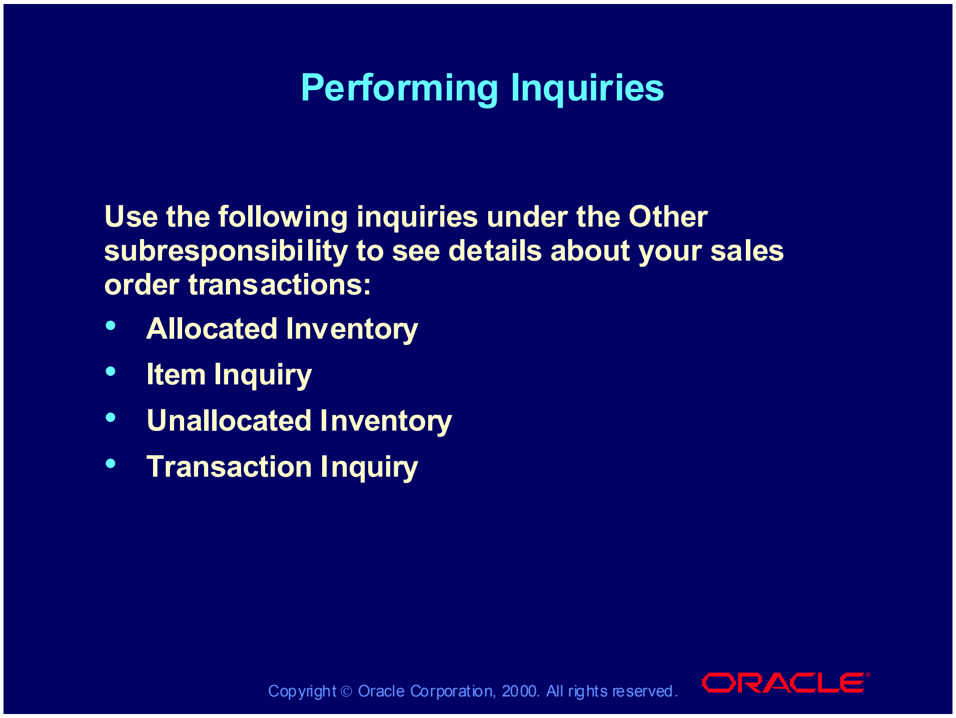
(Help) Oracle Applications User's Guide > Viewing Reports > Viewing Requests > Using the Requests Window



Ship Picklist Report

You can generate the Ship Picklist Report to list the item quantities required to fill order shipment demands, as well as the inventory available to meet those demands. It also lists any actual allocations that have been made. You can limit the report to list picking requirements for only the shipments, orders, customers, warehouses, and dates that you choose.

The Ship Picklist Report is restricted to those order shipments created for the logged-on user’s organization. Only orders in the process of being shipped are included, whether allocations have been made or not. Order lines on hold for picking are not included.

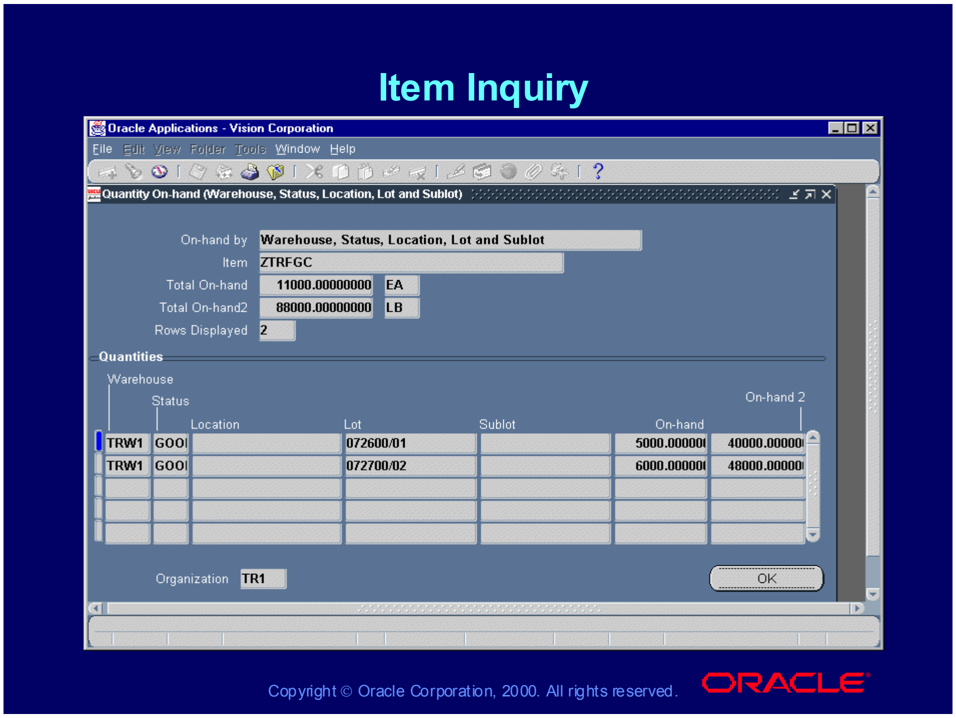


Performing Inquiries

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Inventory > OPM Inventory Management > Inventory Inquiries > Making an Allocated Inventory Summary Inquiry

... > Making an Allocated Inventory Summary Inquiry Procedure

... > Allocated Inventory Summary Field Reference



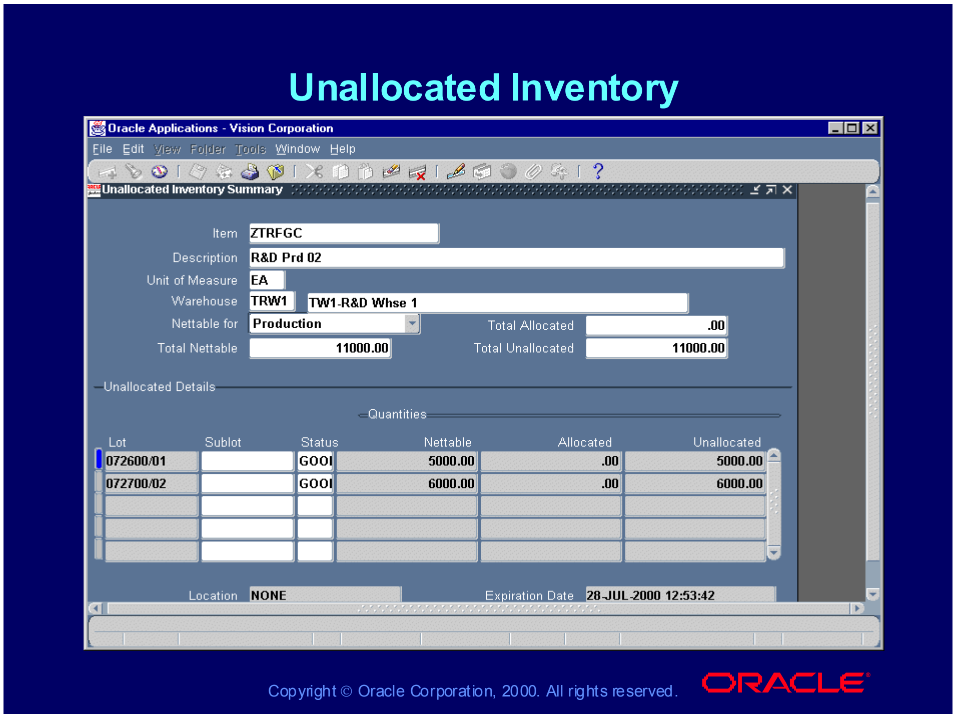
Item Inquiry

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Inventory > OPM Inventory Management > Inventory Inquiries > Making an Item Inquiry

... > Making an Item Inquiry Procedure

... > Item Inquiry Field Reference

Unallocated Inventory

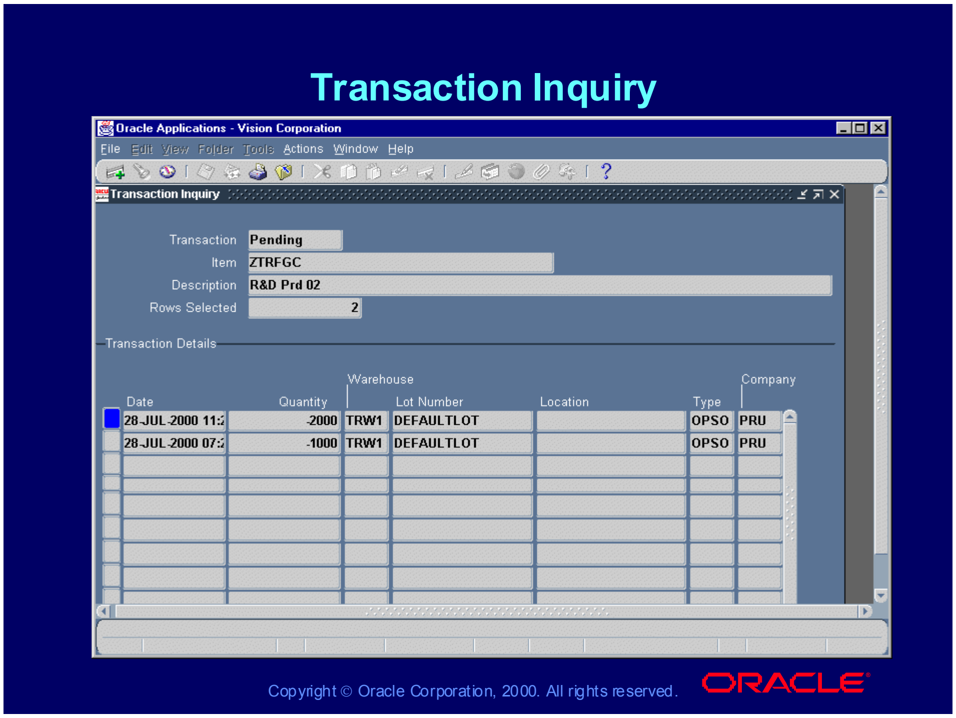


Unallocated Inventory

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Inventory > OPM Inventory Management > Inventory Inquiries > Making an Unallocated Inventory Summary Inquiry

... > Making an Unallocated Inventory Summary Inquiry Procedure

... > Unallocated Inventory Summary Field Reference



Transaction Inquiry

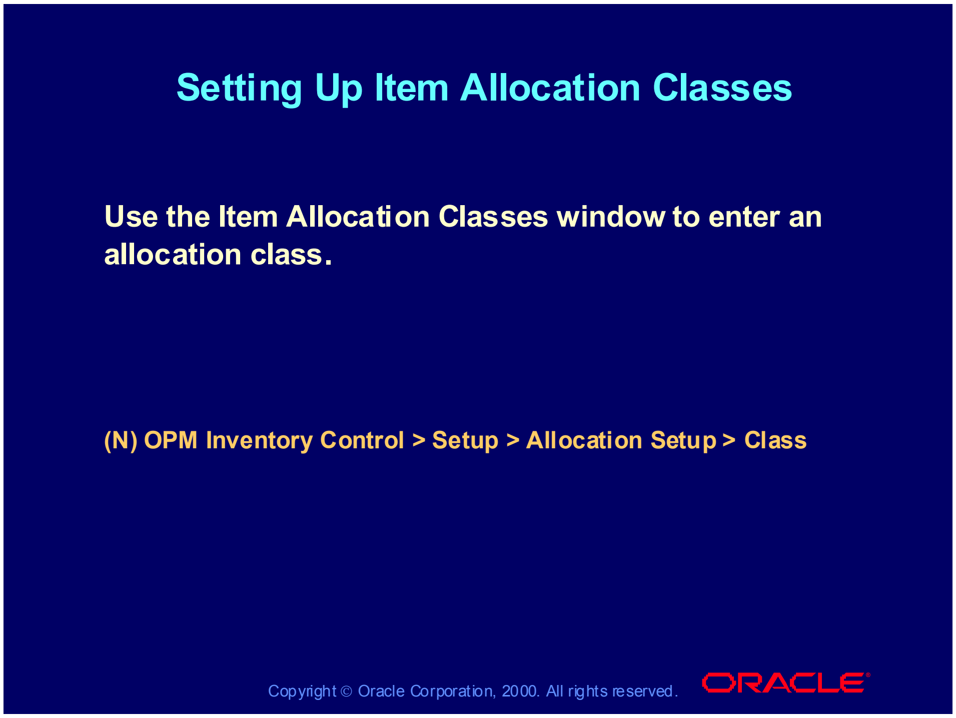
(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Inventory > OPM Inventory Management > Inventory Inquiries > Making a Transaction Inquiry

... > Making a Transaction Inquiry Procedure

... > Transaction Selection Box Field Reference

... > Transaction Inquiry Field Reference

Setting Up Item Allocation Classes



Setting Up Item Allocation Classes

(Help) OPM Inventory > OPM Inventory Management User's Guide > Inventory Types and Classifications > Setting Up Item Allocation Classes

... >Setting Up Item Allocation Classes Procedure

... >Item Allocation Classes Field Reference

Making a Lot Genealogy Inquiry

Lot genealogy provides an essential tool to identify defective materials quickly and efficiently so that management can take appropriate action. Using the inquiry, you can:

- Perform a Lot Source inquiry to determine what ingredients went into a lot
- Perform a Where Used inquiry to find out the products in which a lot was used

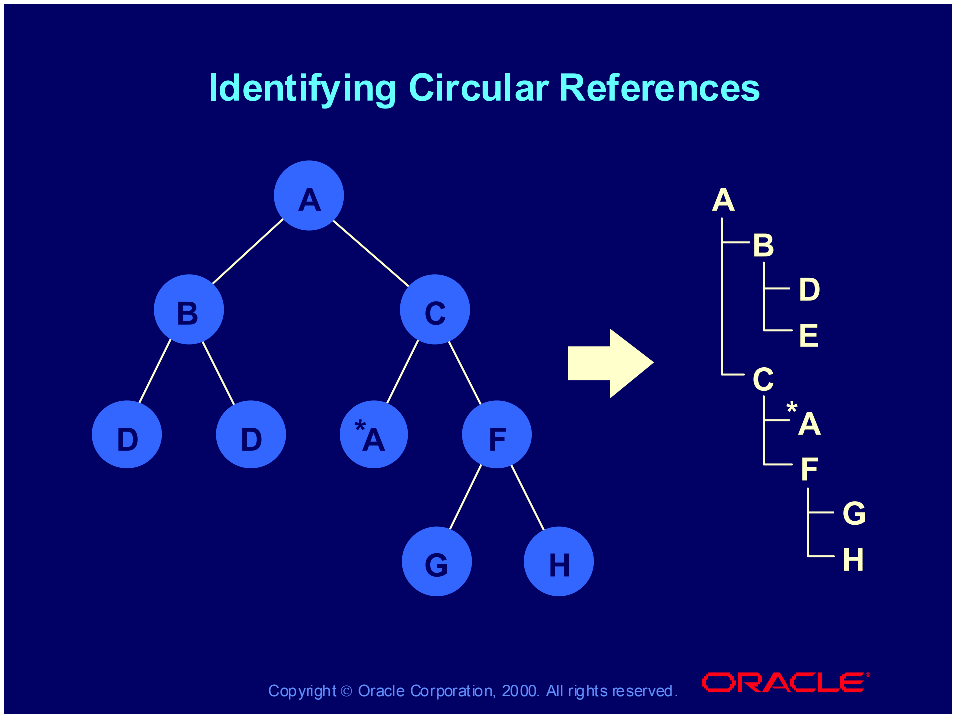
Additional Lot Genealogy Information

Additional Lot Genealogy Information

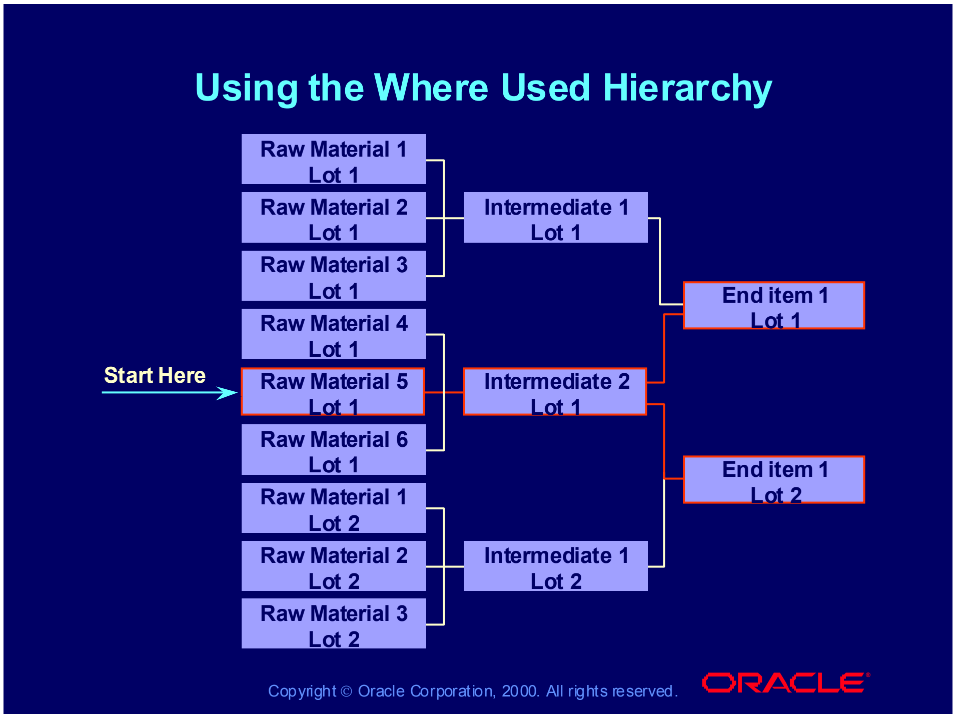
Additional lot information available on the Lot Genealogy Navigator includes the following:

- **Lot attributes**
- **Lot ingredients**
- **Lot products**
- **Lot events**
- **Current on-hand inventory**
- **Quality control**

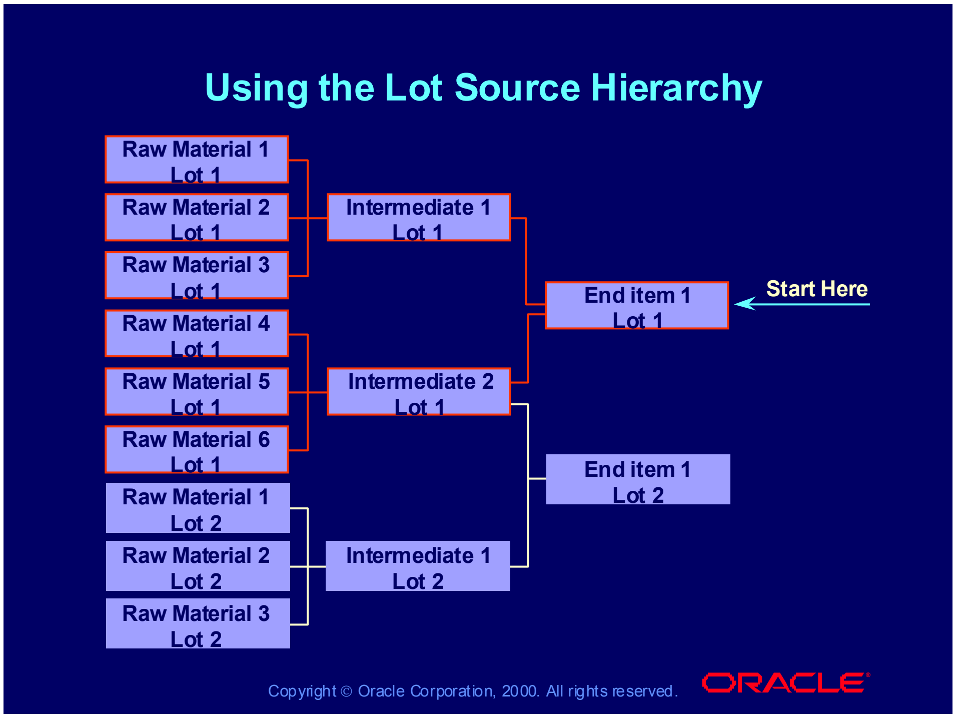
Identifying Circular References



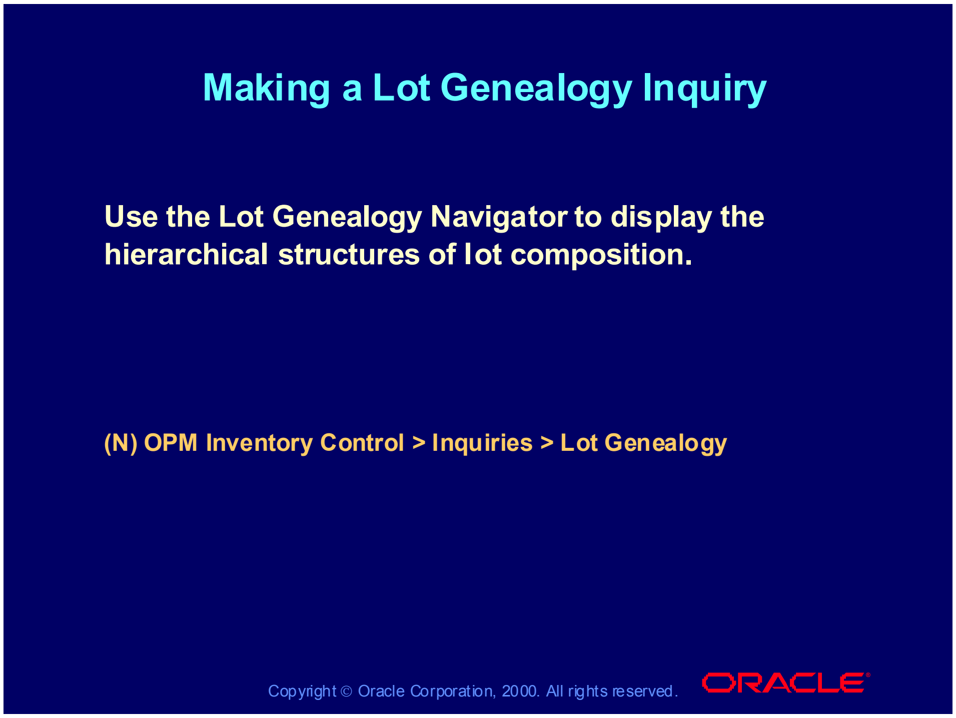
Using the Where Used Hierarchy



Using the Lot Source Hierarchy



Making a Lot Genealogy Inquiry



Making a Lot Genealogy Inquiry

(Help) OPM Inventory > OPM Inventory Management User's Guide > Inventory Inquiries > Determining Lot Genealogy Procedure

... > Find Lot Genealogy Field Reference

... > Lot Genealogy Field Reference

Note: You can also run the Lot Genealogy report by submitting the Lot Genealogy report from the Requests window.

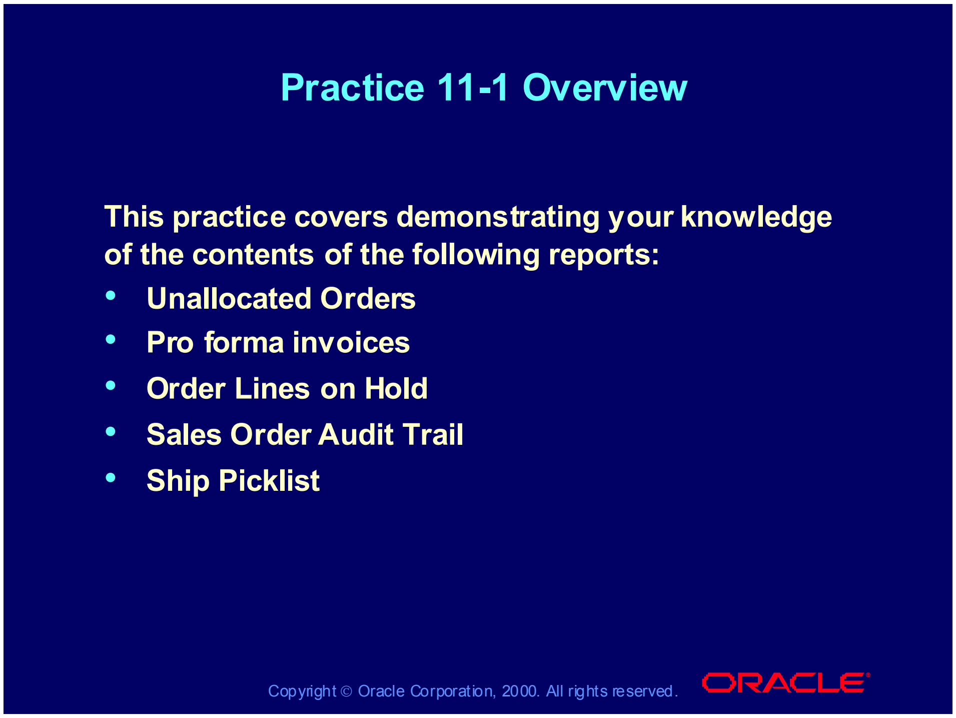
Summary

Summary

In this lesson, you should have learned how to:

- Generate reports
- Perform inquiries
- Demonstrate the Lot Geneology report and inquiry

Practice 11-1 Overview



Scenario

OPM Order Fulfillment offers a series of standard reports, already formatted for you to generate. In this exercise, you will determine which report to use to generate the given information.

1. Which report lists sales orders that have been placed on hold?
2. Which report serves as a shipping document in the international environment?
3. Which report lists all sales order changes recorded for the range of orders that you specify?
4. Which report lists the item quantities required to fill order shipment demands and the inventory available to meet those demands?
5. Which report lists sales order lines for which inventory allocations have not yet been performed?

Practice 11-1 Solutions

Practice 11-1 Solutions

This practice covers demonstrating knowledge of the contents of the following reports:

- **Unallocated Orders**
- **Pro forma invoices**
- **Order Lines on Hold**
- **Sales Order Audit Trail**
- **Ship Picklist**

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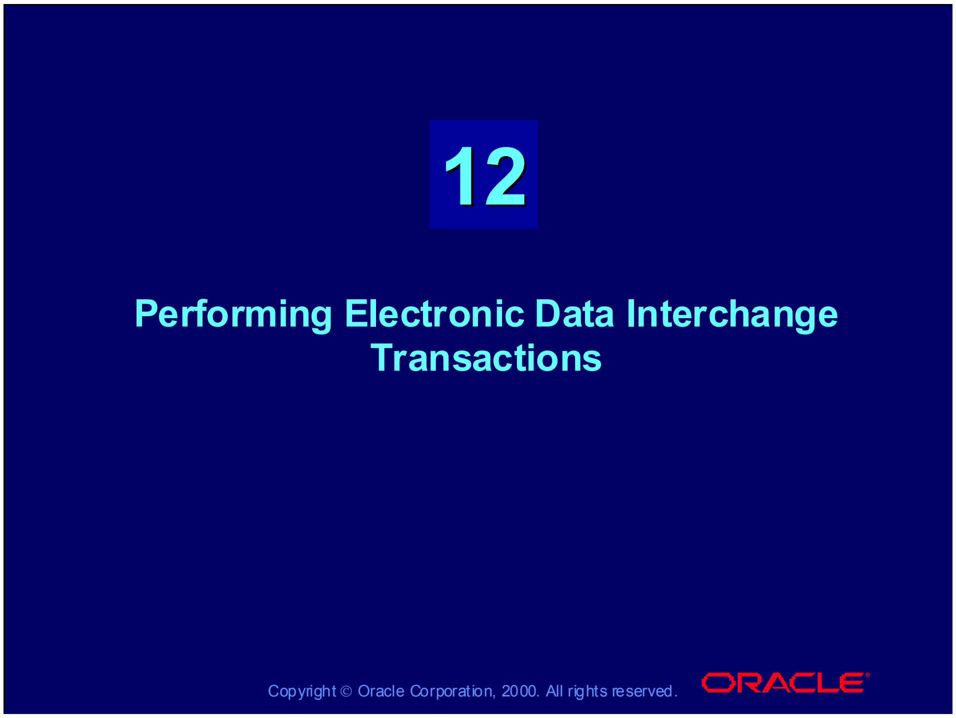
Solutions

1. Order Lines on Hold
2. Pro forma invoices
3. Sales Order Audit Trail
4. Ship Picklist
5. Unallocated Orders

Performing Electronic Data Interchange Transactions

Chapter 12


12
Performing Electronic Data Interchange Transactions
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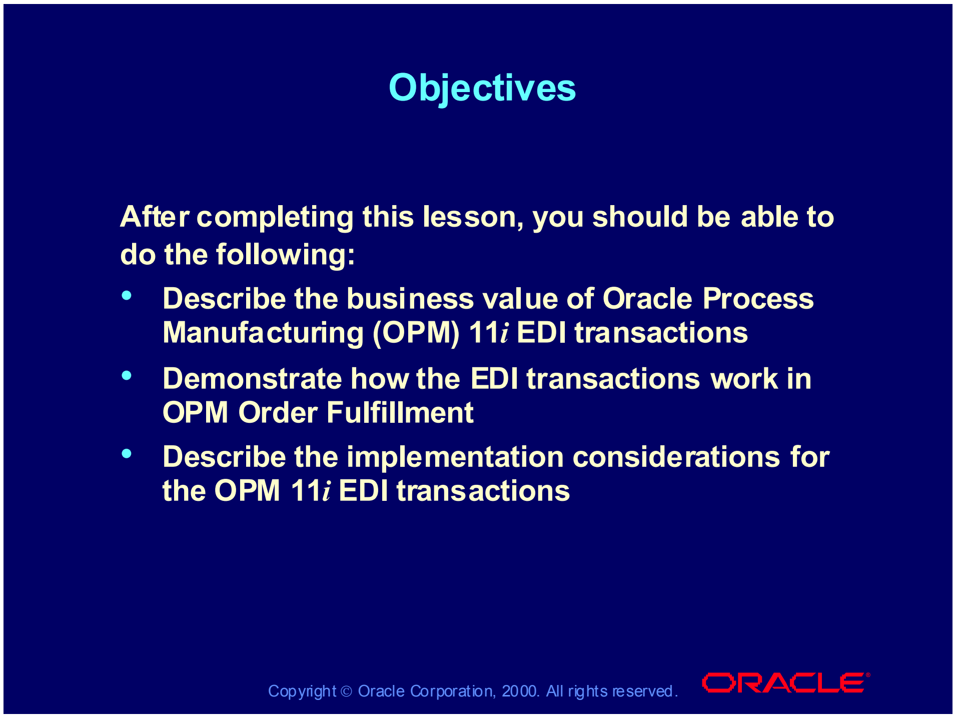
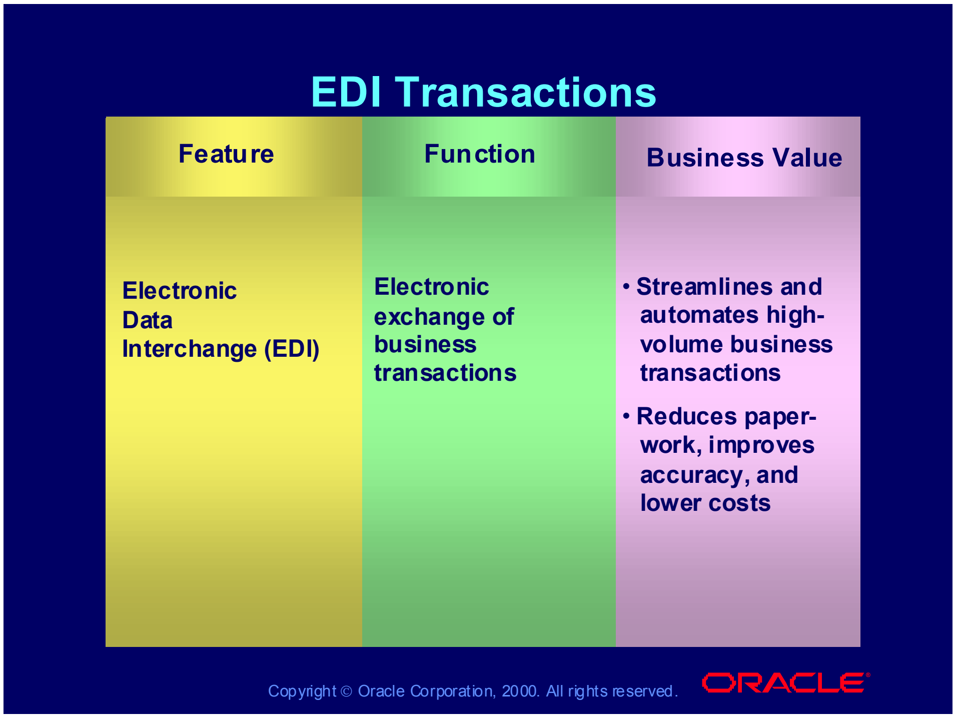
Objectives



Lesson Topics

This lesson describes how to use EDI to enable electronic exchange of business transactions between OPM and trading partners. The three EDI transactions supported in OPM Order Fulfillment will be discussed, as well as how to set them up.

EDI Transactions

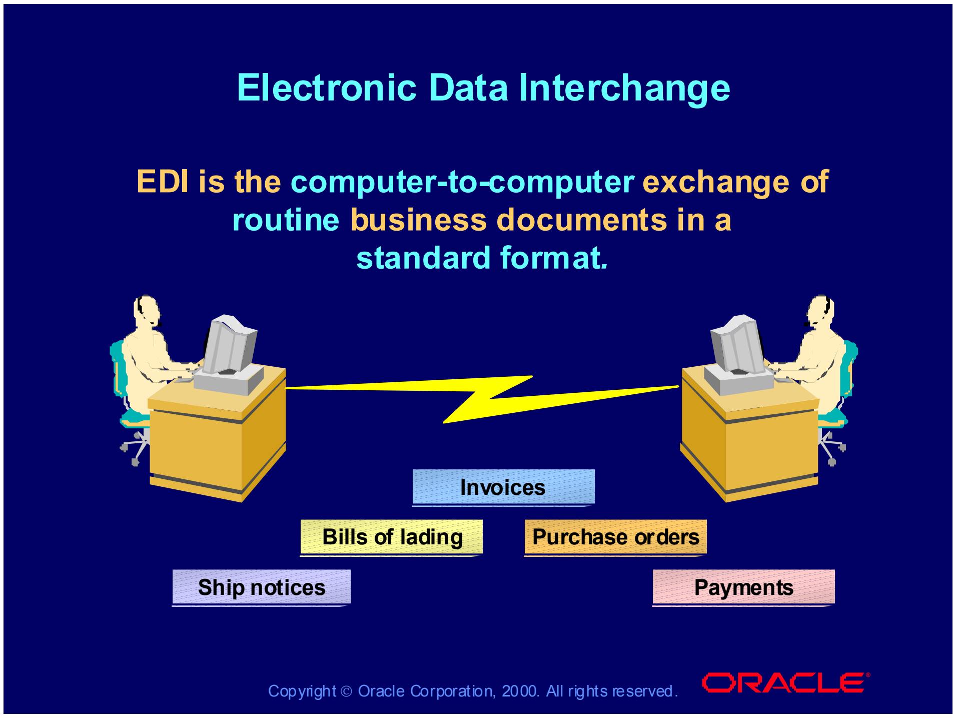


Overview

Three types of EDI transactions are supported in OPM Order Fulfillment:

- Inbound purchase order (which creates a sales order in Order Fulfillment)
- Outbound order acknowledgment
- Outbound ship notice/manifest

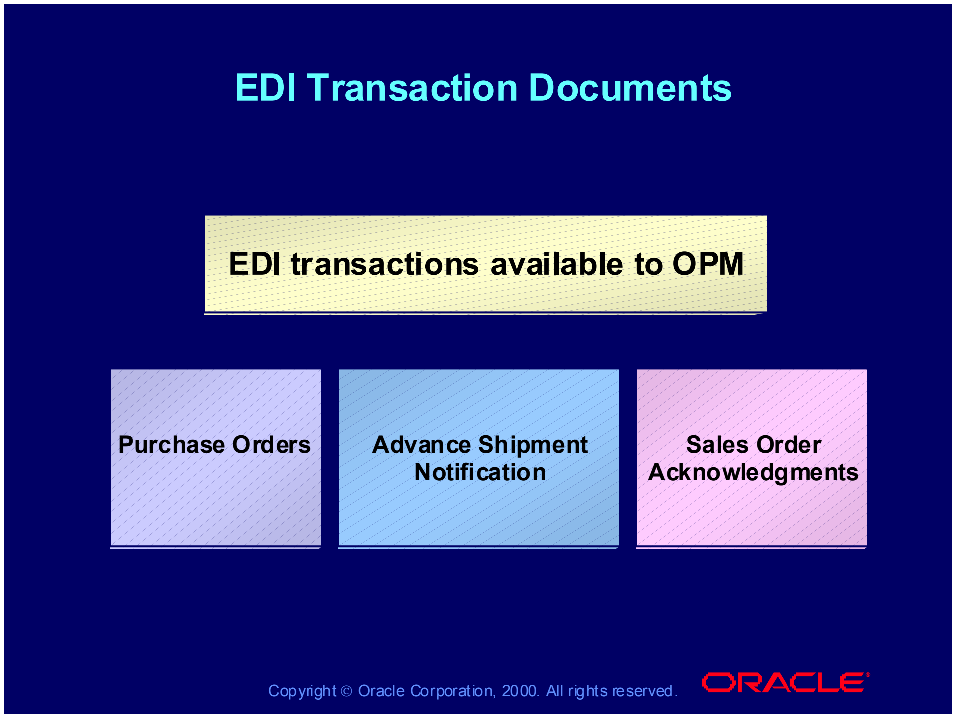
Electronic Data Interchange



Electronic Exchange of Business Documents

- Describes the electronic processing of routine business documents in a standard format
- Assumes that the data is exchanged between well-established business partners such as customers and suppliers
- Enables mass batches of data to be transmitted and electronically processed in a completely paperless environment
- Is not used to send occasional or ad hoc transactions

EDI Transaction Documents



Electronic Data Interchange

Various trading partnerships and business documents are exchanged using EDI. EDI transactions span every business cycle:

Preorder Cycle: Requests for quotes, responses to requests for quotes, price/sales catalogs, award contracts

Forecasting/Planning Cycle: Forecasts, delivery schedules (for JIT)

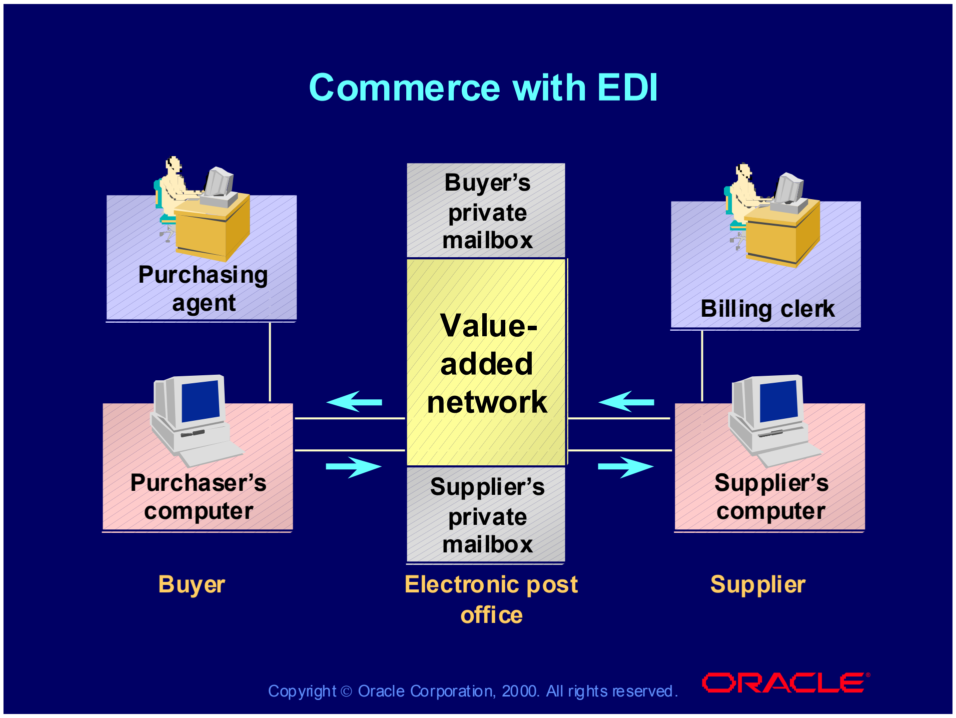
Order/Procurement Cycle: Purchase orders, change orders, purchase order acknowledgments

Domestic Shipping Cycle: Ship notices

International Shipping Cycle: Ship notices, customs declarations

Financial/Payment Cycle: Payment, remittance advice, invoices

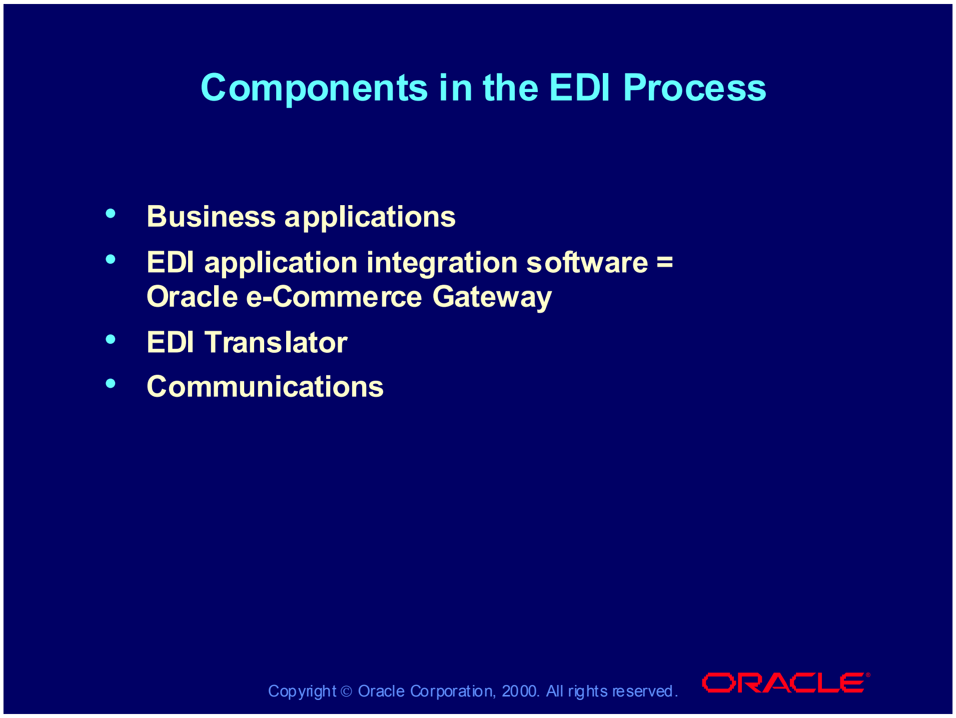
Environmental Data Reporting: Material safety data sheets



Commerce with EDI

- The implementation of EDI streamlines data exchange.
- The EDI process is designed to create electronic purchase orders in real time or on a regular schedule, such as hourly or nightly.
- The purchase orders may be transmitted to the supplier by using third-party networks called value-added networks (VANs), the Internet, or by a direct connection to the trading partner's computer.

Components in the EDI Process



EDI Components

Business Applications

The applications contain all the business data.

EDI Application Integration Software

Outbound transactions: The integration software accesses the applications to extract data and convert codes, then creates the flat files to pass to the EDI translators.

Inbound transactions: The integration software reads files from the EDI translator, converts codes, then loads the data into Application Open Interface tables for processing by the application.

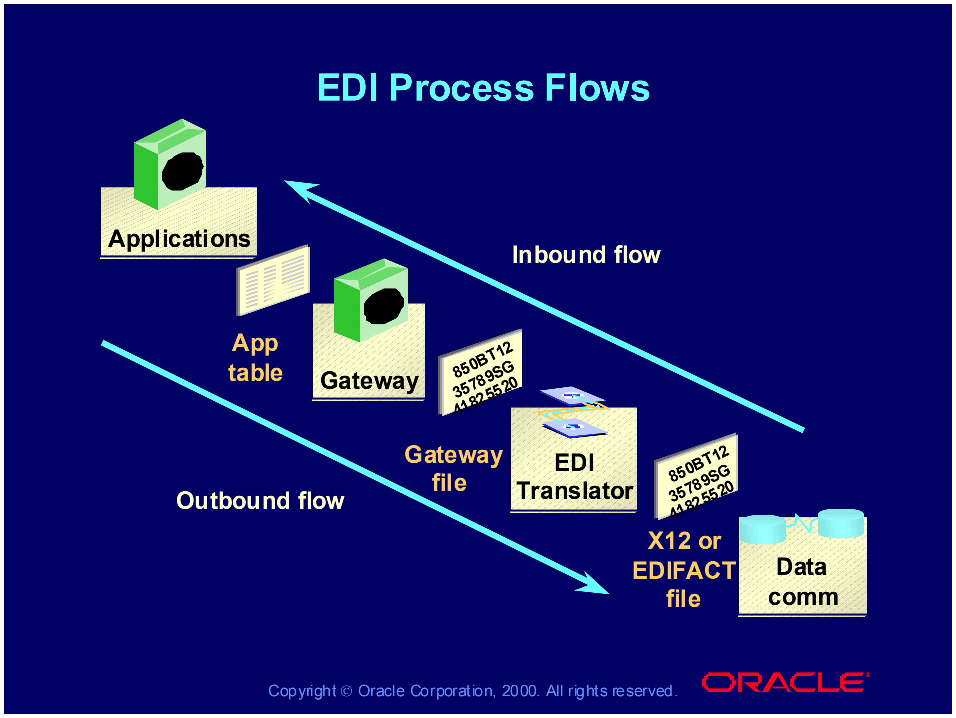
Note: Oracle e-Commerce Gateway performs the two transactions.

EDI Translator

EDI Translator software manages the data between trading partners.

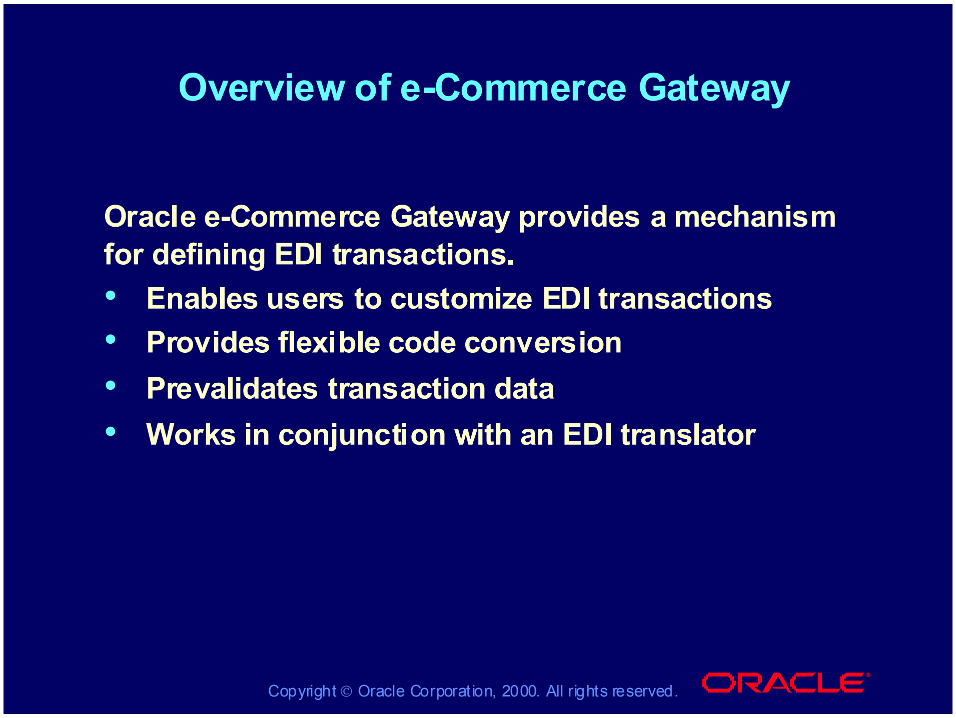
Communications

VANs are an EDI component used in about 70% of the business choices for EDI communications made by trading partners.



Information Flow

- In order to use the EDI transactions in OPM, you must install the e-Commerce Gateway as part of your Oracle Applications installation.
- Oracle e-Commerce Gateway can handle both flat and XML (Extensible Markup Language) files as input and output. Support for XML files is new for 11*i*.



Overview

- Oracle e-Commerce Gateway is a separate Oracle Application that contains extensive functionality concerning the transmission and acceptance of e-Commerce transactions.
- For a complete understanding of the e-Commerce Gateway, there is a separate course given on this product, as well as separate user's guides.

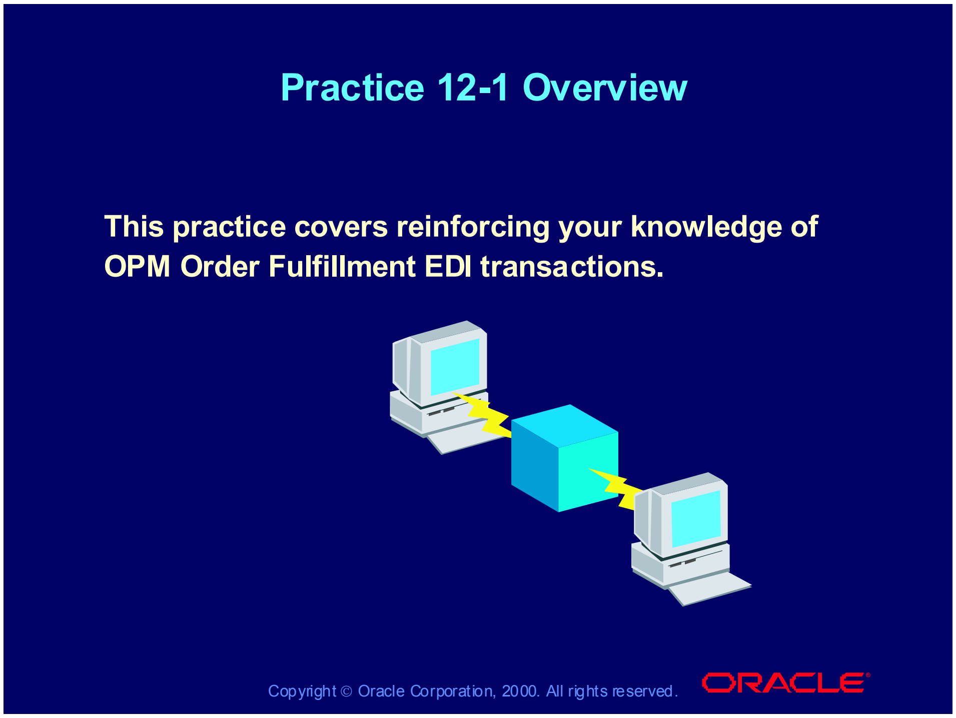
Features of e-Commerce Gateway

- Trading partner definitions
  - Trading partner must be defined as a customer in Oracle Receivables.
  - There must be a link between TP address sites and EDI Translator.
- Code conversion
  - Is user-definable
  - Can apply to one or all trading partners
- Customizable interface files—you can change files without changing or compiling program

Features of e-Commerce Gateway

E-Commerce Gateway has features that enable the application to function with OPM Order Fulfillment and other applications. Flexibility in these definitions is the key to these features.

Practice 12-1 Overview



Fill-in-the-Blank Questions

1. What does EDI stand for? ____
2. EDI is the __________________________________ exchange of routine business documents in a standard format.
3. What three business documents does OPM Order Fulfillment EDI support?

   ___________________, _____________________, ____________________
4. _______________________ is the Oracle application used to extract data, convert codes, and create a flat file to pass to the EDI translator.
5. The most common way to transmit an EDI transaction is by way of a _______________________ , which provides electronic mailboxes for the trading partners to exchange data.
6. List (in order) the components used in the flow of an outbound EDI transaction.

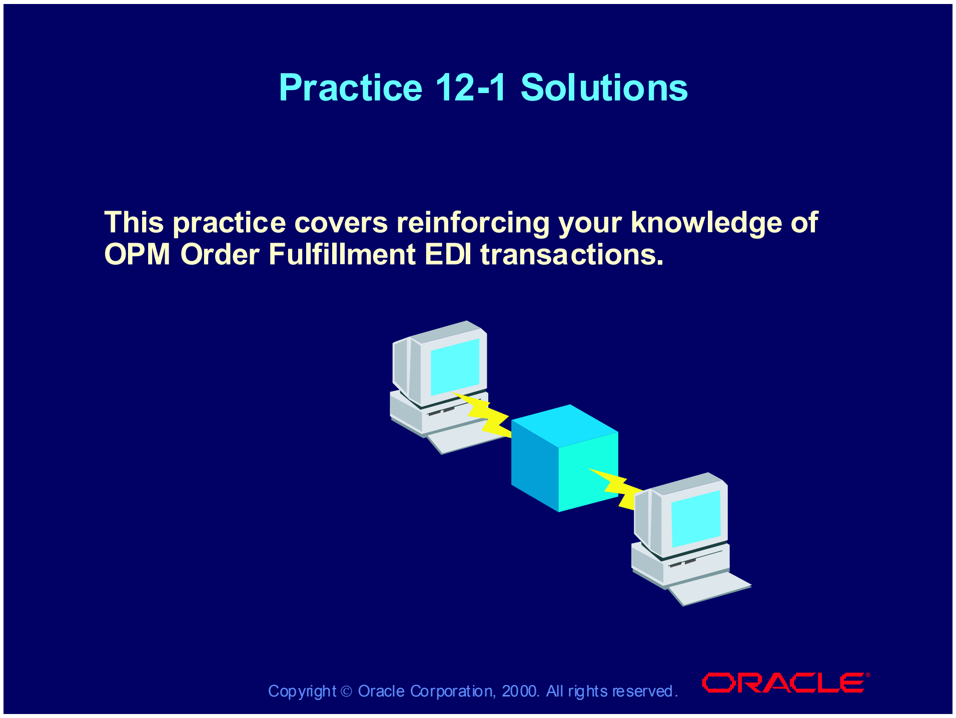
   a. ________________

   b. ________________

   c. ________________

   d. ________________

Practice 12-1 Solutions



Fill-in-the-Blank Answers

1. What does EDI stand for? **Electronic Data Interchange**
2. EDI is the **computer-to-computer** exchange of routine business documents in a standard format.
3. What three business documents does OPM Order Fulfillment EDI support?

   Inbound purchase order, outbound sales order acknowledgment, outbound advanced shipment notification
4. **Oracle e-Commerce Gateway** is the application used to extract data, convert codes, and create a flat file to pass to the EDI translator.
5. The most common way to transmit an EDI transaction is by way of a **value-added network**, which provides electronic mailboxes for the trading partners to exchange data.
6. List (in order) the components used in the flow of an outbound EDI transaction.

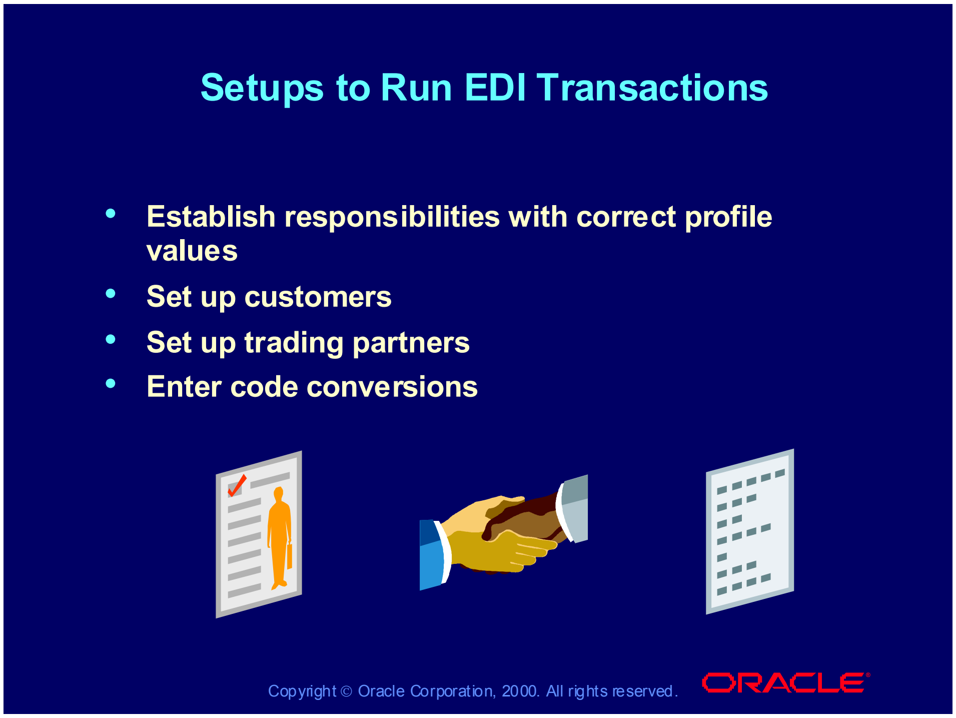
   a. Application

   b. Gateway

   c. EDI Translator

   d. Data Communications

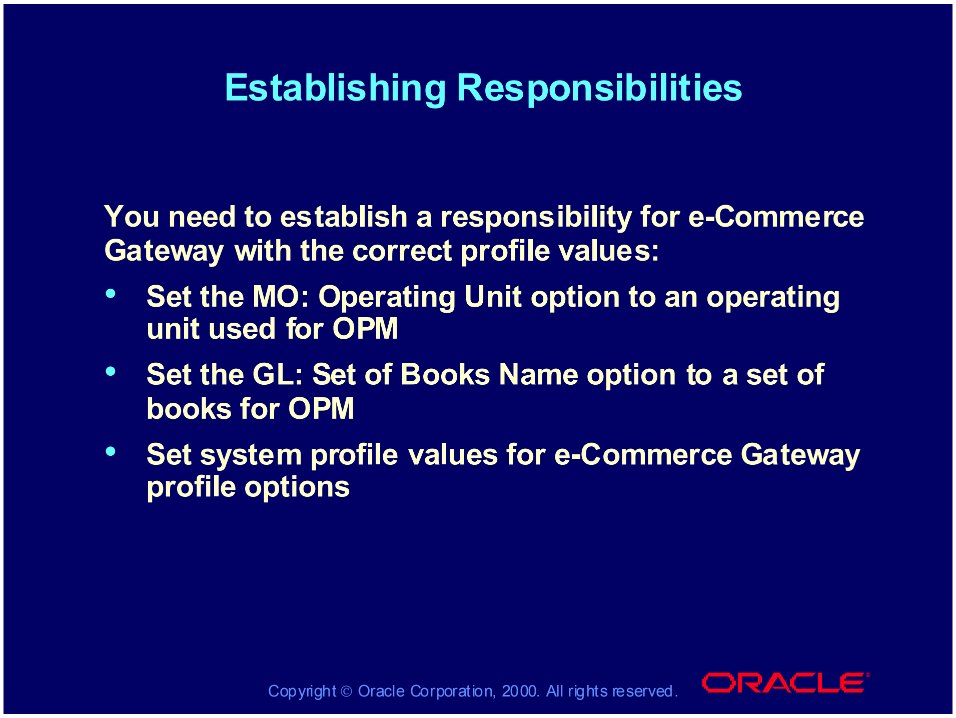
Setups to Run EDI Transactions



Setups for EDI Transactions

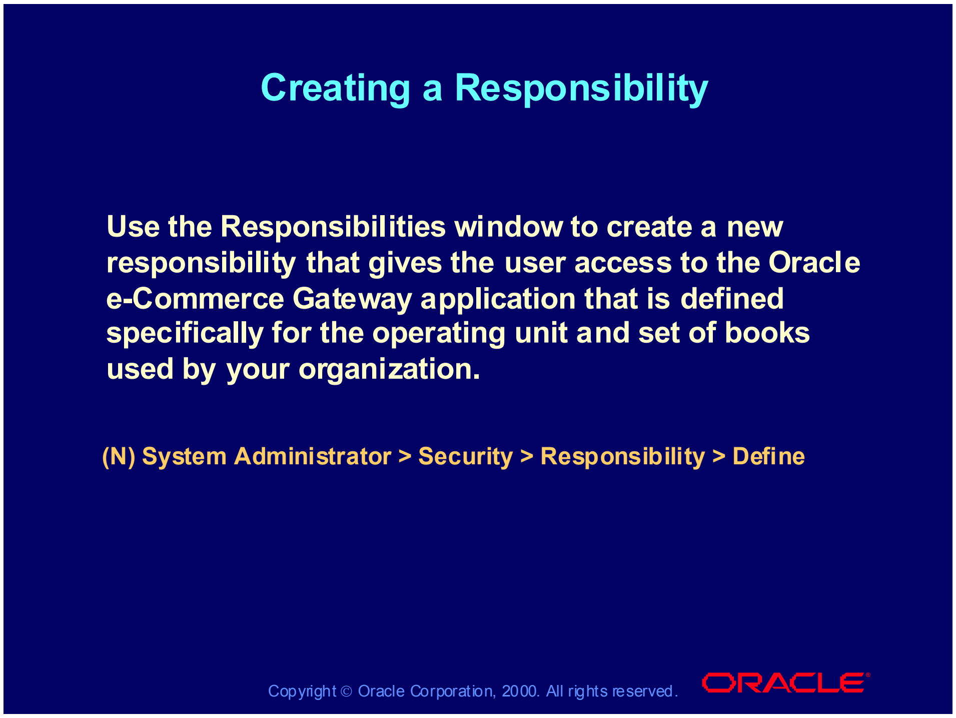
Setup is done in several applications:

- Define responsibilities in Oracle System Administration
- (N) System Administrator > Responsibility > Define
- Define customers in Oracle Accounts Receivables
  (N) Receivables SuperUser > Customers > Standard
- Trading partners and code conversions are defined in Oracle e-Commerce Gateway
  (N) e-Commerce Gateway > Setup > Trading Partners
  (N) e-Commerce Gateway > Setup > Code Conversion > Define Code Conversion Values



Profile Options

These profile values allow OPM, Oracle Financials, and e-Commerce Gateway to work together.



Creating a Responsibility

(Help) Applied Technology > Oracle Applications System Administration > Oracle Applications System Administration > Overview of Oracle Applications Security > Defining a Responsibility

e-Commerce Gateway Transaction Profiles

Use the Transaction Profiles window to view the directories where the inbound input file and the outbound transaction file reside.

(N) e-Commerce Gateway > Setup > Profile Options

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Transaction Profile Values

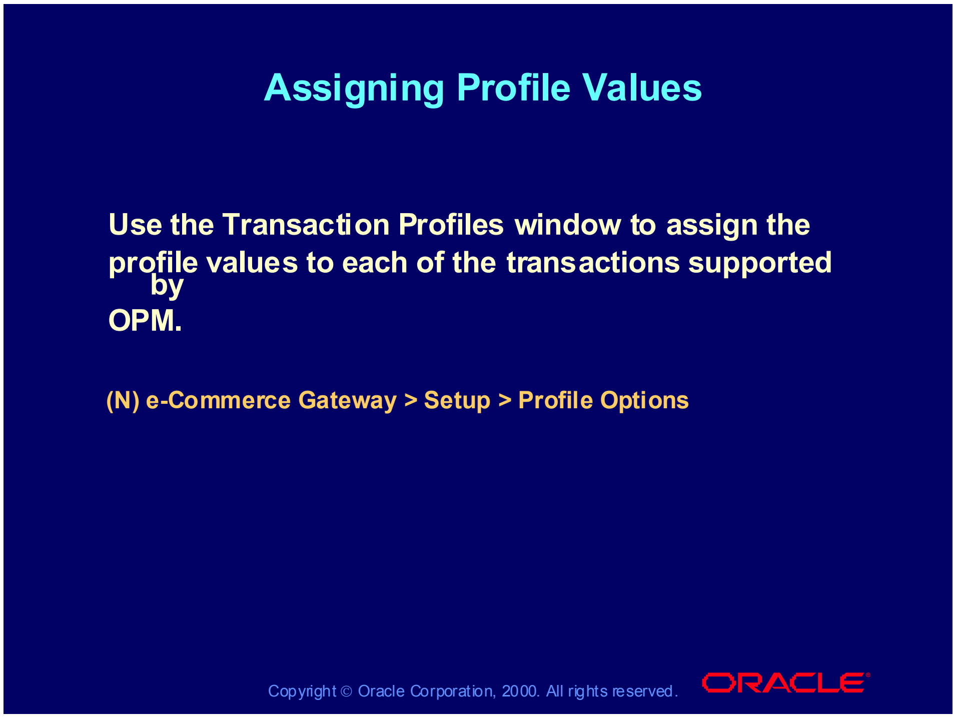
(Help) Oracle Manufacturing Applications > Oracle e-Commerce Gateway > Setting up Oracle e-Commerce Gateway > Setting Profile Options

Directories are contained in the transaction profiles as follows:

- ECE_IN_FILE_PATH contains the directory where the inbound input file resides.
- ECE_OUT_FILE_PATH contains the directory where the outbound transaction file will be written.

Note: ECE_IN_FILE_PATH and ECE_OUT_FILE_PATH must be set to directories that are established at the database level. Contact your database administrator for information about which directories are valid for your installation.

Assigning Profile Values



Profile Values for Each Transaction

(Help) Oracle Manufacturing Applications > Oracle e-Commerce Gateway > Setting up Oracle e-Commerce Gateway > Setting Profile Options

For each transaction supported by OPM there is a corresponding profile value that you must define.

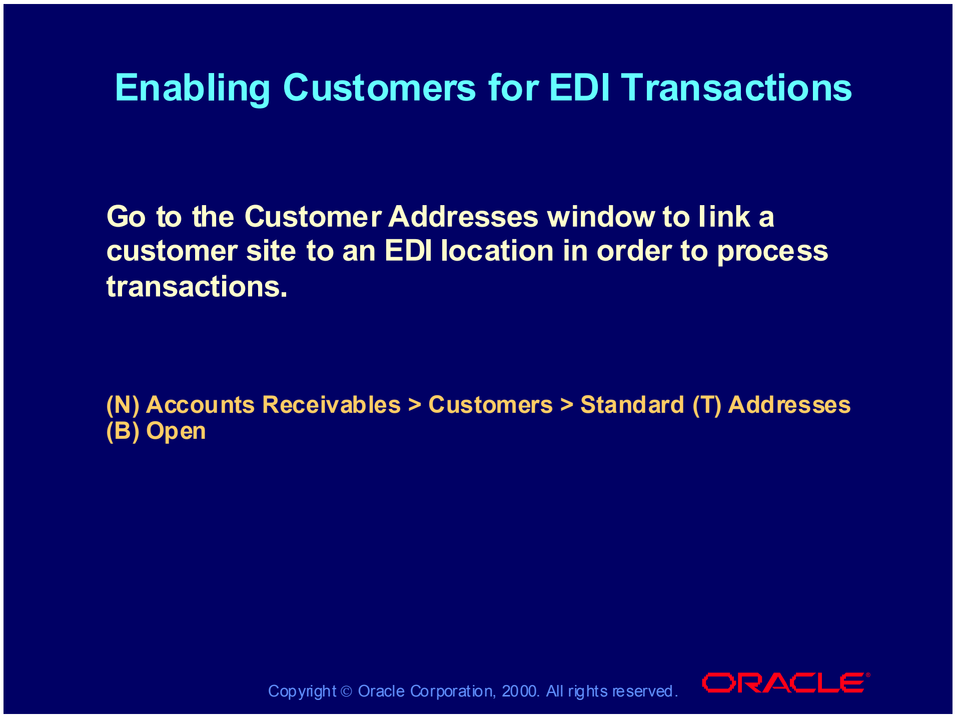
The three transactions currently used in OPM Order Fulfillment are:

Transaction Profile	Description	Profile Name	Profile Value
OUT: OPM PO PHA,LON	Outbound OPM	ECE_GPOI_ LTC,	
Ack (855)	Purchase Order Acknowledgment	ADDRESS_ PRECEDENCE	
		ECE_GPOI_ ENABLED	Yes
OUT: OPM	Outbound OPM	ECE_GASNO_	Yes

Profile Values for Each Transaction (continued)

Transaction Profile	Description	Profile Name	Profile Value
ASN (856)	Advanced Shipment Notification	ENABLED	
IN: OPM Purchase Order	Inbound Purchase Order	ECE_GPOAO_ ENABLED	Yes (850)

Note: In each profile name, the *G* represents the product GEMMS, the last letter *O* or *I* denotes outbound or inbound respectively, and the letters between them represent the transaction type.



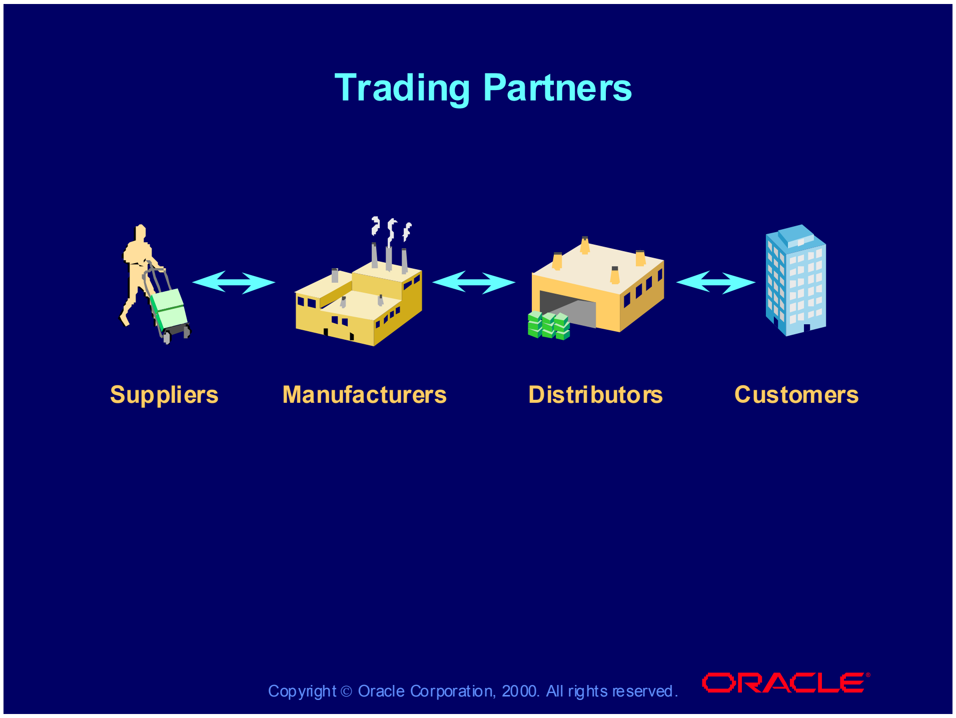
Linking Customer Information to EDI

(Help) Oracle Financial Applications > Oracle Receivables > Customers > Entering Customer Addresses

When creating a customer, you must link the customer site to an EDI location in order to process transactions. This link is located in the Customer Addresses window of each address under the Address tab. You must highlight the address that will be using EDI and open each record.

The EDI Location field is a free-form field, and the code you enter should be unique for each EDI location.

Trading Partners



Trading Partners

A trading partner is any business entity that is engaged in the process of exchanging EDI transactions.

Example: If you use the direct deposit service for your paycheck, then the bank is your trading partner for that transaction.

Customers and suppliers are other trading partner business entities.

Defining Trading Partner Groups

(Help) Oracle Manufacturing Applications > Oracle e-Commerce Gateway > Trading Partners > Defining Trading Partner Data

Defining Trading Partners

Trading Partner Details Tab

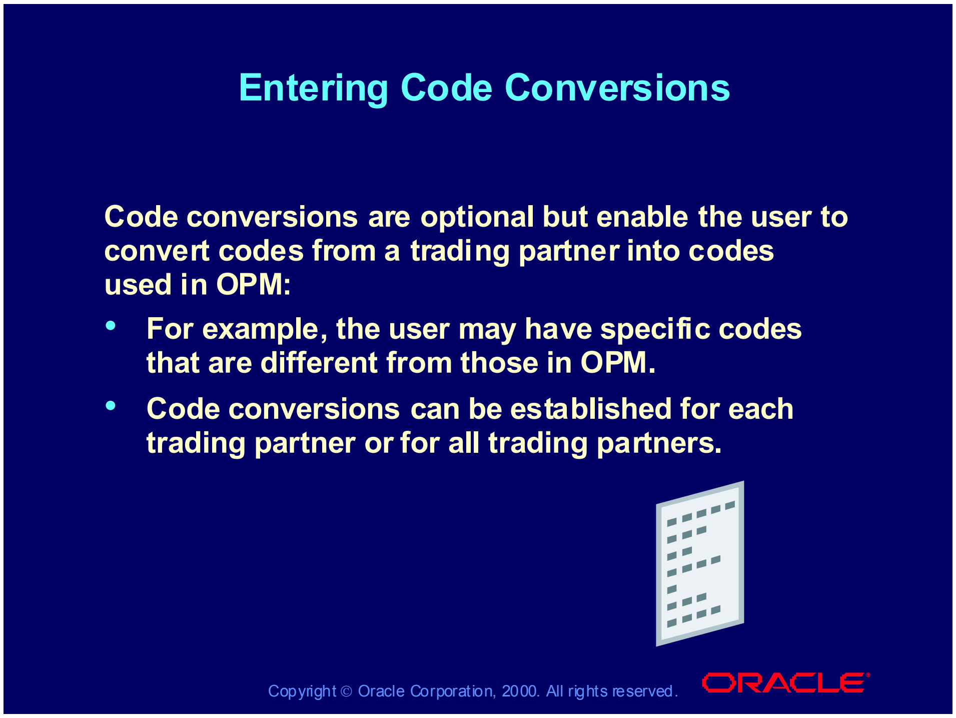
(Help) Oracle Manufacturing Applications > Oracle e-Commerce Gateway > Trading Partners > Defining Trading Partner Data

Select one, two, or all three of the transactions supported by OPM Order Fulfillment, and choose either a flat file or XML format for the inbound/outbound file format.

Note: The translator code is tied to code conversions, which are optional. If the code is different than the default translator code, then code conversions need to be defined.

Leaving this field blank will default to the default EDI translator.

Entering Code Conversions



Code Conversions

Code conversions are not required. You will need to set up code conversions only if the file format from your trading partner is different from your system default. To set up code conversions follow these steps:

1. Define code conversion categories.

   (N) e-Commerce Gateway—>Setup—>Code Conversion—>Define Code Conversion Categories

2. Assign code conversion categories.

   (N) e-Commerce Gateway—>Setup—>Code Conversion—>Assign Code Conversion Categories

3. Define code conversion values.

   (N) e-Commerce Gateway—>Setup—>Code Conversion—>Define Code Conversion Values

4. Define interface file.

   (N) e-Commerce Gateway—>Setup—>Interface File Definition

Entering Sales Order and Shipping Transactions

Entering Sales Orders and Shipments

A sales order creates a PO acknowledgment file and a shipment creates an advanced shipment notification file.

Note: Creating sales orders and shipments in OPM Order Fulfillment remains the same as in previous releases.

Review Question

Review Question

A customer is linked to the EDI location in the:

1. Customer Classification window
2. Customer Address window
3. Customer Profile window
4. Customer Business Purpose window

Review Question Solution

A customer is linked to the EDI location in the:

1. Customer Classification window

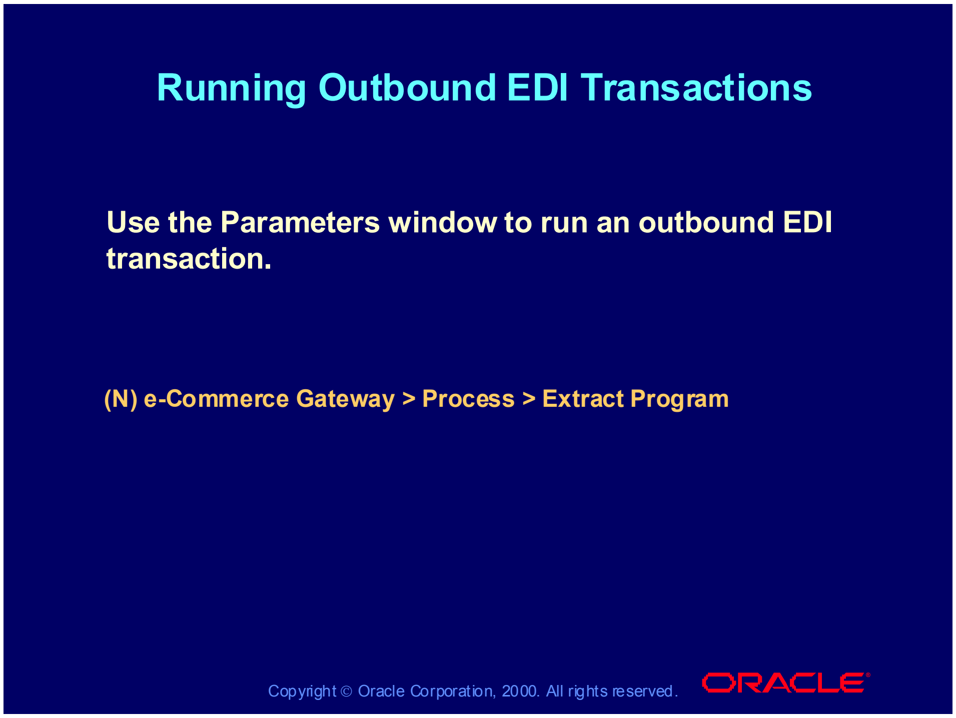
2. Customer Address window

3. Customer Profile window

4. Customer Business Purpose window

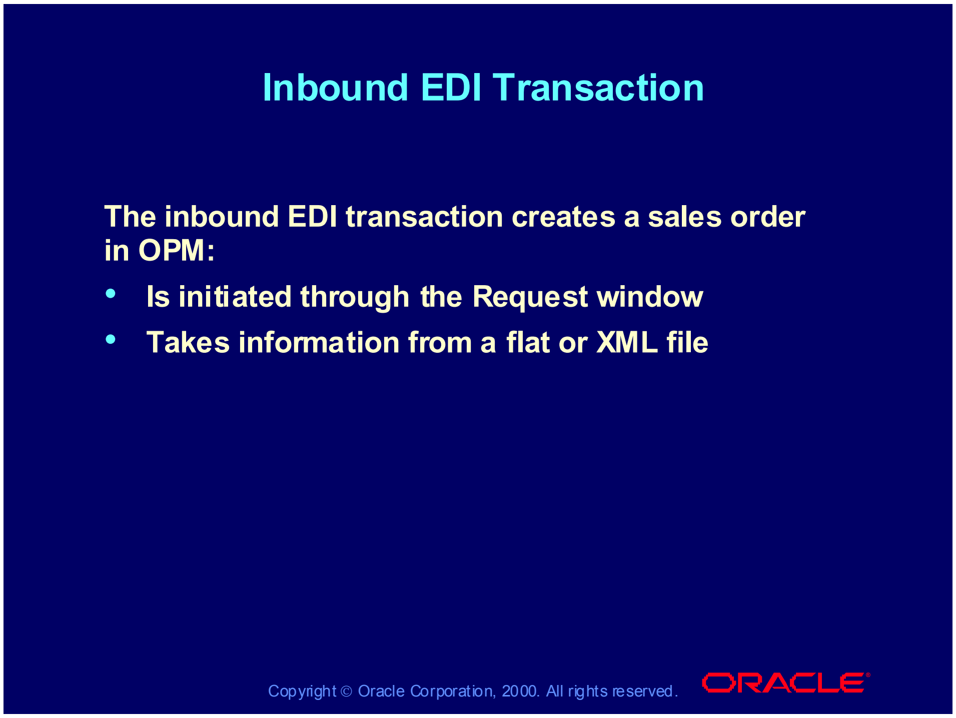
Answer:

A unique EDI location is created for each customer address to form a link.



Running Outbound EDI Transactions

(Help) Oracle Manufacturing Applications > Oracle e-Commerce Gateway > Outbound Transactions > Running the OPM ASN Extract Program

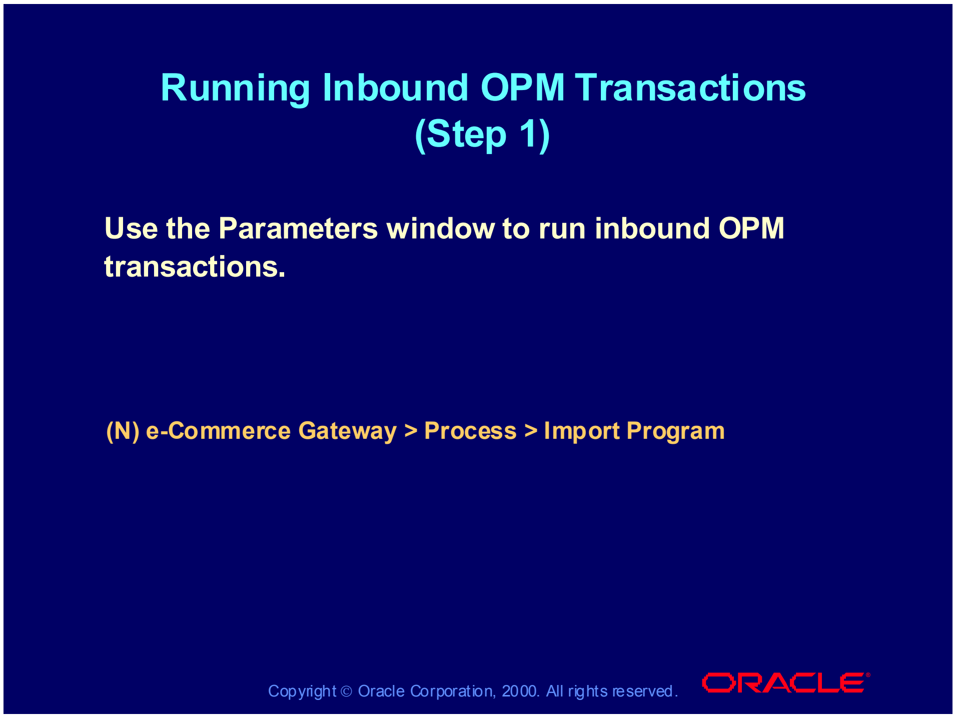


Inbound EDI Transaction

To receive inbound EDI transactions, open the Import program of e-Commerce Gateway and process either a single request or a group of requests. Inbound EDI transactions are completed in two steps:

1. Run Inbound OPM Transaction from e-Commerce Gateway to stage the flat file into the interface tables.
2. Run OPM Order Entry Open Interface from OPM Order Fulfillment to create sales orders from the information in the interface tables.

Running Inbound OPM Transactions (Step 1)



Running Inbound EDI Transactions

(Help) Oracle Manufacturing Applications > Oracle e-Commerce Gateway > Inbound Transactions > Running the OPM PO Import Program

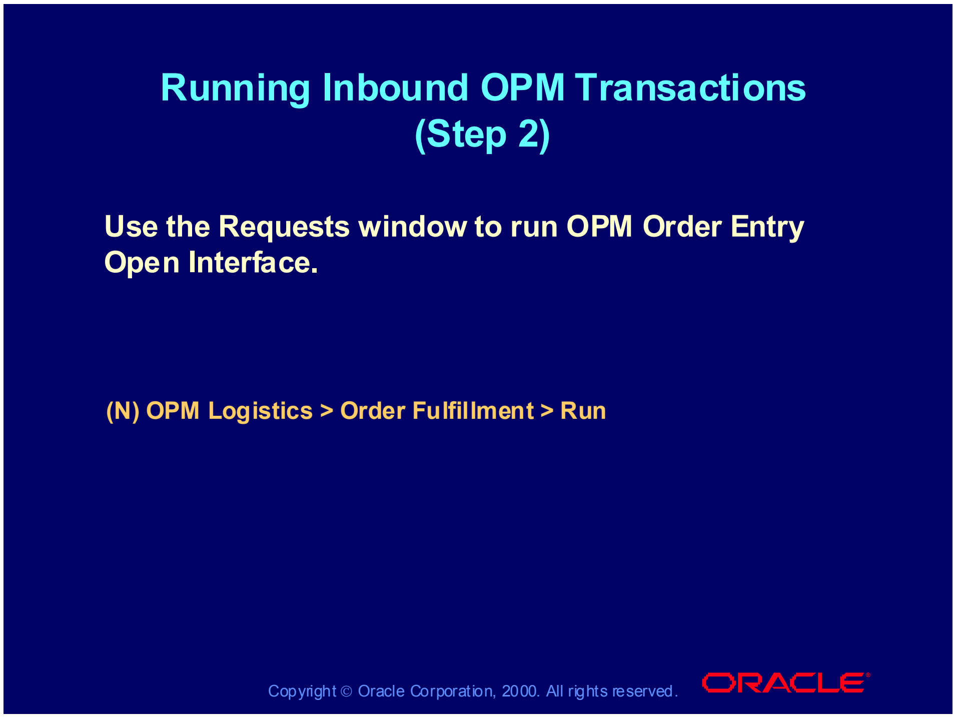
The Execute Open Interface Flag has two values:

- No: The user is required to run the two-step process outlined in this guide.
- Yes: The system runs the OPM Inbound transaction process and the OPM Order Entry Open Interface process (this feature is currently not functioning).

One of the parameters to set is Debug Level. The values are:

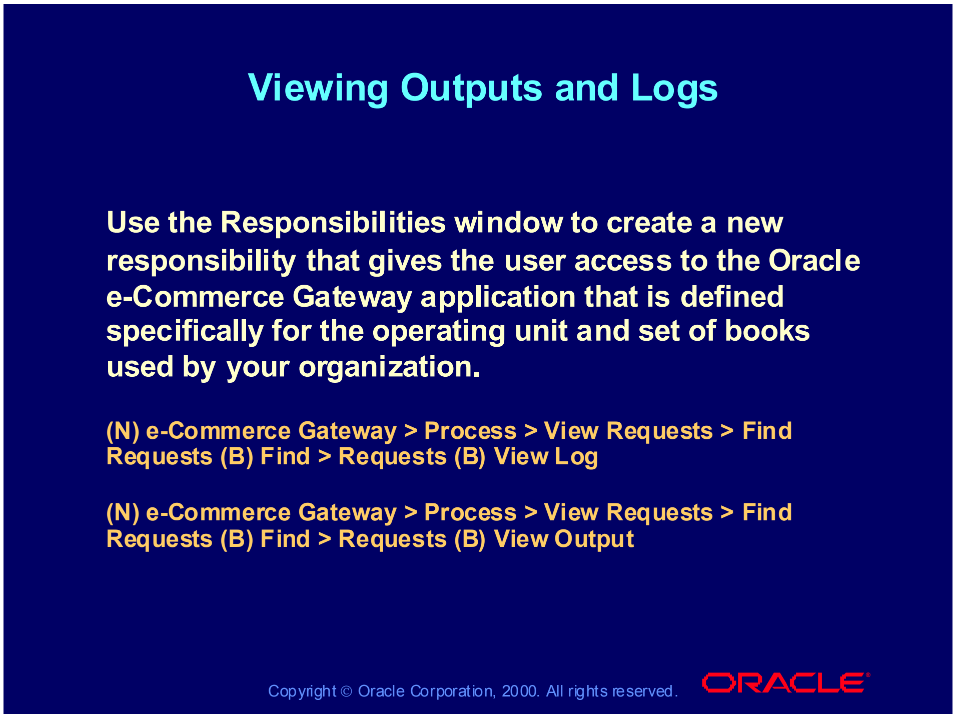
- 0: Shows the minimal amount of information on the log file (error log)
- 1: Shows more information on the log file
- 3: Shows the most information on the log file and can affect the run time (makes the transaction run slower)

The log file is viewed from the View Requests window after the transaction is completed.



Running Inbound EDI Transactions (continued)

(Help) Oracle Applications User's Guide > Viewing Reports > Viewing Requests > Using the Requests Window



Viewing Outputs and Logs

(N) e-Commerce Gateway > Process > View Requests > Find Requests

(B) Find > Requests (B) View Log

View Logs

The view log from the Concurrent Manager shows the results of the run. The amount of detail you will see depends on the value you select in the Debug Mode field in the Parameters window.

View Output

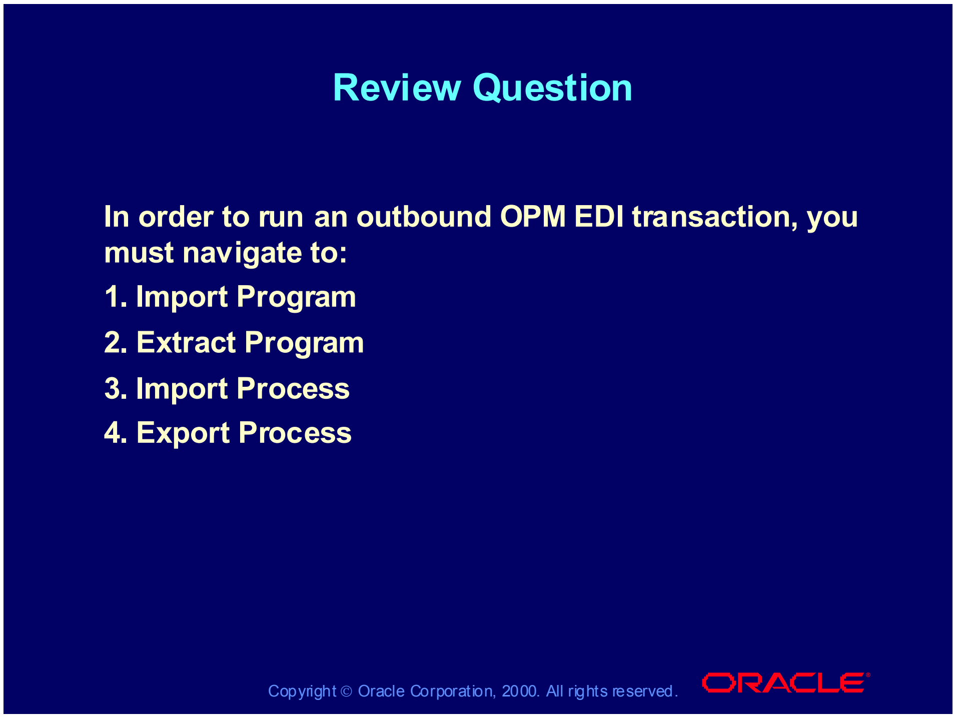
(N) e-Commerce Gateway > Process > View Requests > Find Requests

(B) Find > Requests (B) View Output

View Outputs

The view output displays a list of the number of transactions that were received and the number of sales orders that were created.

Review Question



Review Question Solution

In order to run an outbound OPM EDI transaction, you must navigate to:

1. Import Program

2. Extract Program

3. Import Process

4. Export Process

Answer:

Navigate to the e-Commerce Gateway responsibility tied to OPM > Process > Extract Program

For More Information

- Attend training on Oracle e-Commerce Gateway, Release 11*i*.
- Refer to the user’s guide for Oracle e-Commerce Gateway, Release 11*i*.

Summary

Summary

In this lesson, you should have learned how to:

- Explain how to use the EDI transactions in the order fulfillment cycle
- Demonstrate how the EDI transactions work within OPM Order Fulfillment
- Explain the implementation considerations of Oracle e-Commerce Gateway

Course Setup Considerations

Chapter 13


13
Course Setup Considerations
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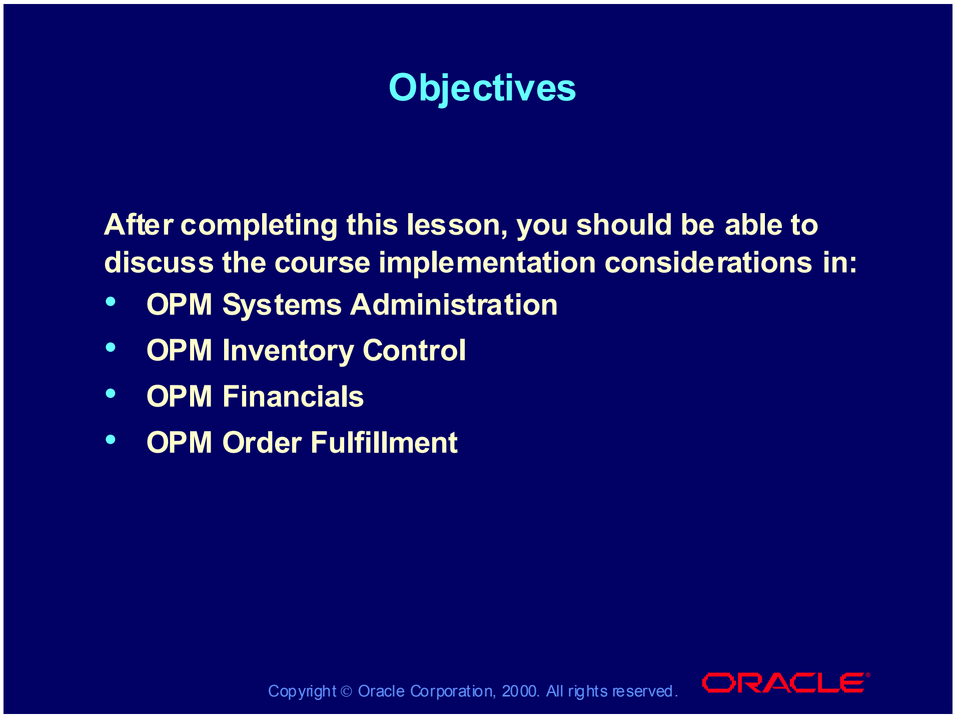
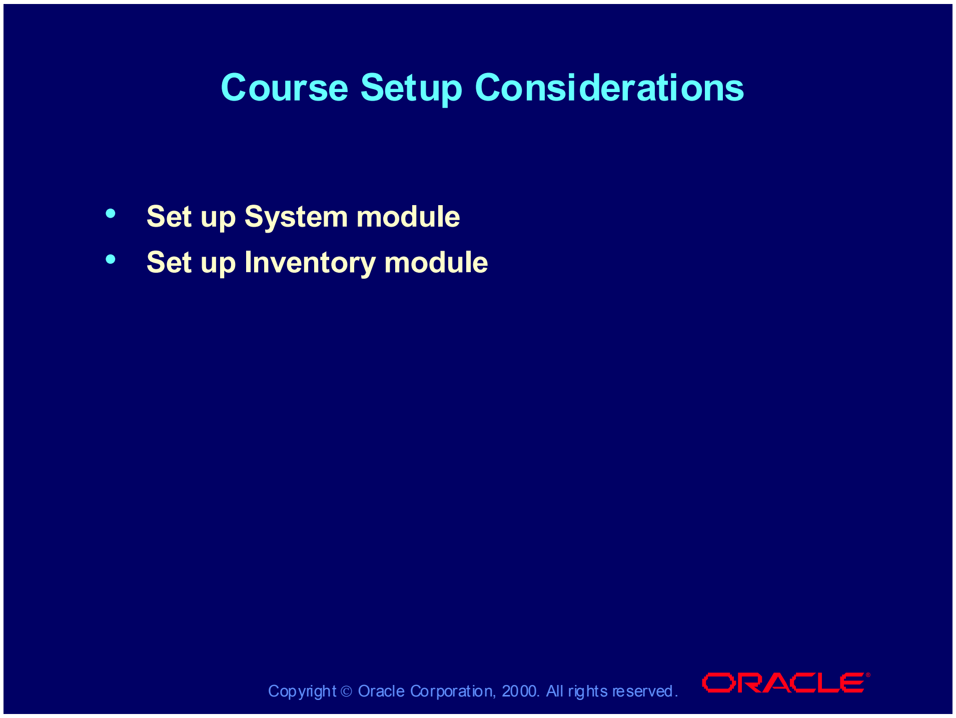
Objectives



Introduction

The following discussions highlight the information that must be defined before you can use Oracle Process Manufacturing (OPM) Order Fulfillment to the fullest advantage.

Course Setup Considerations



Systems Setups

The following must be set up in the Systems responsibility:

- Unit of measure types
- Units of measure
- Organizations
- Document ordering
- Reason codes

Inventory Setups

The following must be set up in the Inventory responsibility:

- Items
- Item/Lot UOM conversions
- Warehouses

Oracle Financial Setups

The following must be set up in Oracle Human Resources and Oracle Financials:

- Sales representatives
- Free on board (FOB) codes
- Freight bill methods
- Carriers
- Terms codes
- Currency
- Exchange rate types
- Exchange rates
- Customers

Sales Management Setup

You must define basic data that OPM requires to process sales orders. This data includes the carriers and shipping methods used to send ordered goods to your customers and the values to be defined in order to create sales order holds.

You must also define various customer and trade classifications for sorting and reporting purposes to use Order Fulfillment to the fullest advantage.

Order Fulfillment Setups

Modify Order Status Descriptions

OPM Order Fulfillment provides a series of predefined order status codes. Each of these status codes indicates the processing stage for a sales order (for example, Inventory Allocated). You can enter new descriptions for these status codes to better fit your enterprise’s order-processing procedures.

Maintain Order Types

Each type determines which processing steps apply to an order. Examples of order types include:

- Normal orders
- Emergency orders
- Samples
- Transfer orders

A series of switches enables you to determine which processing functions occur for each order type.

- If the order will be processed for shipping
- If taxes will be calculated for the orders
- If OPM will process the orders automatically

Order Fulfillment Setups (continued)

Note: Order type code and language code together produce the order type key; each type code/language code combination must be unique.

Maintain Packaged Items

Define the containers in which bulk items will be packaged, as well as the bulk item fill quantities. Also indicate package configuration on a loading pallet.

Define Lockboxes

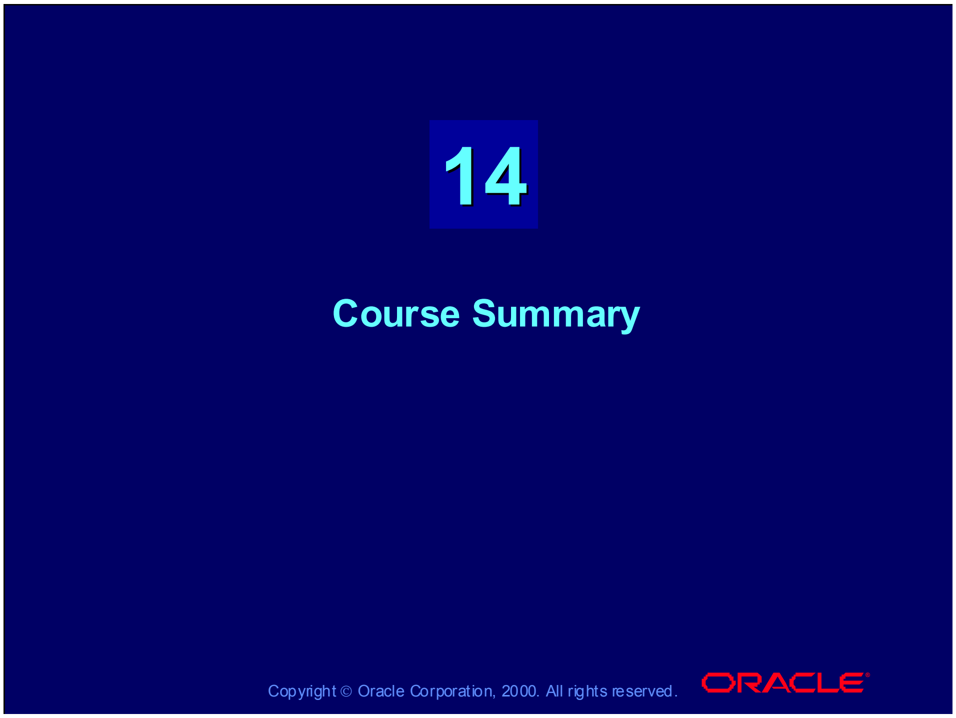
If you have customers who send payments to one or more lockboxes for your organization, you can describe those lockboxes.

Define Customers

Establish each of your customers in OPM, designate each as a ship-to or bill-to customer, and enter the corresponding address. Also specify default ordering, shipping, and billing information, customer-specific items, and contacts at the customer site.

Course Summary

Chapter 14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Course Summary
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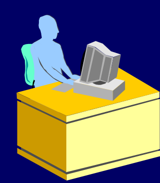
Course Summary

In this course, you should have learned how to:

- **Perform sales management setup**
- **Execute customer setup**
- **Perform Order Fulfillment setup**
- **Manage order pricing**
- **Administer sales order entry**
- **Manage shipments**
- **Generate standard reports**



Summary

OPM Sales Management improves order processing and fulfillment by helping you carefully manage each phase of your order cycle, including sales order initiation, pricing, inventory allocation, order tracking, shipping, and invoicing. To facilitate your ability to respond efficiently and accurately to customer orders, OPM Sales Management maintains centralized, detailed account information that defines your business relationship with every customer.