(25A) Oracle SCM Cloud: Order Management and Fulfillment Cloud Implementation

Oracle Supply Chain Management (SCM) Cloud

DURATION	MODULES	COURSE CODE
5 Days	**34 Lectures**	**—**

Course Overview

This Oracle SCM Cloud: Order Management and Fulfillment Cloud Implementation training gives you the fundamental skills you need to perform the functional setup of the Fusion SCM applications in the functional area of Order Management

What You Will Learn

Overview of Order Management and Fulfillment

- Learning Objectives
- Topics
- Order Management and Fulfillment Business Flows
- Business Flow: Physical Goods
- Business Flow: Nonphysical Goods
- Business Flow: Return Order
- Topics
- Business Flow: Transfer Order
- Business Flow: Change Order
- Topics
- Order-to-Cash Process
- Order Management and Fulfillment Flow
- Order Management Integrations
- Integrations with Oracle Cloud Applications
- Business Case: End-to-End Flow
- Summary

Importing Orders

- Learning Objectives
- Order-to-Cash Process

- Importing Orders
- Topics
- Import Methods
- Direct Web Service Integration
- File-Based Data Import
- Import Template
- Business-to-Business Messaging
- Topics
- How Orders Are Imported
- Topics
- Importing Coverage and Subscription Lines
- Import of Coverage Order Line Against Configured Covered Items
- Using Order Import to Modify and Cancel Coverages
- Import of Coverage Return Lines
- Import of Subscription Lines
- Import of Revision
- Best Practice: Optimizing Import Processing
- Topics
- Sequence of Sales Order Numbers
- Sequence of Sales Order Numbers: Setup
- Practices: Overview
- Summary

Transforming Orders

- Learning Objectives
- Topics
- Transform Orders
- Transformation: Overview
- Sales Order Versus Transformed Order
- Transformed Order: Example
- Topics
- Types of Transformation
- Product-to-Product Transformation
- Attribute-to-Product Transformation
- Context-to-Product Transformation
- Product-to-Attribute Transformation
- Attribute-to-Attribute Transformation
- Context-to-Attribute Transformation
- Topics
- Setting Up Transformation
- Transformation Using Oracle Business Rules
- Practice
- Summary

Creating Orders

- Learning Objectives
- Topics
- Order-to-Cash Process
- Creating Orders: Flow
- Topics
- Types of Items
- Topics
- Item Definition
- Topics
- Ordering a Standard Item
- Topics
- Ordering a Configurable Item: Explained
- Configure the Model: Getting Started
- Referenced Models
- Pricing Configurable Items (Models)
- Topics
- Ordering a Service Item
- Ordering Subscriptions
- Consider these Possible Scenarios
- Setting Up the Order Management-Subscription Management
- Integration: Overview
- Service Item Charges and Invoices
- Topics
- Information You Can Capture on an Order
- Header
- More on Sales Credits
- Managing Order Representative
- Order Line Information
- More on Tax Determinants
- Shipping Information
- Capture Actual Delivery Date for a Shipment
- Billing and Payment Information
- Copying an Order
- Copying an Order – Considerations
- Copying an Order – Limitations
- Demo
- Practices
- Summary

Pricing Orders: Pricing Strategies

- Learning Objectives
- Order-to-Cash Process
- Topics

- Pricing in Order Management
- Pricing Setup
- Business Use Case
- Topics
- Pricing Strategies: Overview
- Pricing Strategies: Customer Pricing Profiles
- Pricing Strategies: Pricing Segments
- Pricing Strategies: Pricing Strategy Assignments
- Pricing Strategies
- Price Execution: Derive Pricing Strategy
- Topics
- Matrixes: Overview
- Matrix Classes
- Matrix Types
- Matrix Rules
- Demo
- Practices
- Summary

Pricing Orders: Price Lists

- Learning Objectives
- Order-to-Cash Process
- Topics
- Price Lists
- Price List
- Price Lists: Types
- Price List Use Case
- Charges
- Charges: Examples of Calculations
- Adjustments: Tier-Based
- Tier-Based Adjustment: Example
- Adjustments: Attribute-Based
- Attribute-Based Adjustments: Example
- Item Extensible Attributes for Attribute-Based and Category-Based Rules
- Setting Up Adjustments Based on the Item Category
- Adjustments Based on Item Category: Where to Perform the Setups
- Setting Up Adjustments Based on Item Category Using the Price
- Adjustment Matrix
- Adjustments: Manual
- Pricing of Standard Items
- Pricing of Configurable Items (Models)
- Pricing of Coverage Items
- Pricing of Subscription Items
- Demo
- Topics

- Price List Maintenance: Redwood
- Price List Maintenance: ADFdi
- Price List Maintenance: File-Based Data Import
- FBDI: Uploading a Batch
- FBDI: Understanding the Price List Import Batch Template
- Price List Maintenance: Charges and Tiers
- Maintenance: Deleting Pricing Data from Interface Tables
- Practices: Overview
- Topics
- Price Lists – New
- New Price Lists User Interface
- Price List – Approvals
- Summary

Pricing Orders: Discounts and Promotions

- Learning Objectives
- Order-to-Cash Process
- Topics
- Discount List Use Case
- Discount Lists
- Simple Discounts
- Tier-Based Discounts
- Attribute-Based Discounts
- Item Extensible Attributes for Attribute-Based and Category-Based Rules
- Setting Up Discounts According to the Item Category
- Discounts According to Item Category: Where to Perform the Setups
- Establishing Discounts for Configurable Models
- Demo
- Topics
- Discount Lists: Management
- Practice
- Topics
- Maintenance: Deleting Pricing Data from Interface Tables
- Topics
- Discount Lists – New
- Managing Discount Rules for Standard Items
- Managing Discount Rules for Component Items
- Topics
- Pricing Promotions in Order Management
- Benefits and Eligibility
- Creating Pricing Promotions
- Adding a Promotion Line
- Adding Benefits and Eligibility
- Creating Rules: Tips and Considerations
- Predefined Order Attributes You Can Use

- Implementing Pricing Promotions
- Allow Pricing to Consider Closed Lines When Pricing an Item
- Summary

Pricing Orders: Shipping Charge Lists

- Learning Objectives
- Order-to-Cash Process
- Topics
- Shipping Charge Lists: Overview
- Topics
- Shipping Charge List Use Case
- Topics
- Define Item-Based Shipping Charges
- Create Shipping Charges
- Demo
- Summary

Pricing Orders: Guidelines

- Learning Objectives
- Order-to-Cash Process
- Topics
- Guidelines: Overview
- Guideline Validation
- Topics
- Guidelines: How Do I Set Them Up?
- Make Price Elements Eligible for Use in Guidelines
- Create Conditions in the Pricing Matrix Class
- Map a Matrix Class to the Pricing Charge Guideline Matrix Type
- Map the Pricing Operation to the Pricing Process
- Demo
- Summary

Submitting Orders

- Learning Objectives
- Topics
- Order-to-Cash Process
- Order Submission
- Detailed Order Submission Process
- Topics
- Order Submission and Defaulting Extensions
- Flow of Order Submission and Defaulting Extensions
- Topics
- Validations
- Managing Configurator Behavior

- Topics
- Credit Check
- Credit Check Failure
- Topics
- Global Trade Management
- Summary

Extending Order Management

- Learning Objectives
- Order-to-Cash Process
- Extending Order Management
- Topics
- Service Mappings
- Service Mappings: Flow
- Service Mappings: High-Level Setup Steps
- Topics
- Order Management Order Profiles
- Topics
- Order Management Parameters: General Parameters
- Order Management Parameters
- Topics
- Using Order Management Extensions
- Creating Order Management Extensions
- Order Management Extensions
- Extension Events
- Order Management Data: Read Access (all events)
- Order Management Data: Write Access
- Filtering Lines In Extensions, Rules, and Constraints
- Topics
- Personalizing the Order Management Landing Page
- Modifying the Order Management Landing Page
- Privileges for Modifying the Landing Page
- Topics
- Extensible Flexfields (EFFs)
- Extensible Flexfields on UI Pages
- Extensible Flexfields: Deployment
- Extensible Flexfields: Setup
- Migrating Setup Data
- Summary

Managing Approvals

- Learning Objectives
- Order-to-Cash Process
- Approvals
- Topics

- Approvals: Introduction
- Serial Approval
- Parallel Approval
- Parallel Approval: Example
- Topics
- High-Level Approval Flow
- Setup: High-Level Steps
- Alter the Approval Task: Assignees, Deadlines
- Alter the Approval Task: Notifications, Access, Configuration
- Create an Approval Rule
- Set Up the Start Approval Process for Sales Orders Parameter
- Demo
- Practice
- Summary

Managing Processing Constraints

- Learning Objectives
- Order-to-Cash Process
- Processing Constraints
- Topics
- Processing Constraints: Introduction
- Processing Constraint Components
- Topics
- Managing Constraint Entities
- Demo
- Topics
- Managing Processing Constraints
- Importing and Exporting Processing Constraints
- Practices: Overview
- Summary

Assigning Orchestration Processes

- Learning Objectives
- Order-to-Cash Process
- Topics
- Managing Orchestration Process Assignment
- Sales Order Before and After Process Assignment
- Managing Orchestration Process Assignment Rules
- Topics
- Orchestration Groups
- Practice
- Summary

Defining Orchestration Processes

- Learning Objectives

- Order-to-Cash Process
- Topics
- Orchestration
- Topics
- Task Types Predefined
- Predefined Task Types: Explained
- Creating Your Own Task Type
- Creating Your Own Task Type: Additional Setup
- Topics
- Predefined Orchestration Processes
- Managing an Orchestration Process Definition
- Topics
- Dependencies Between Steps
- Demo
- Topics
- Oracle Business Rules (OBR) in Orchestration Process Definitions
- Demo
- Topics
- Validating New or Updated Orchestration Process Definitions
- Topics
- Setting Up Orchestration Processes for Coverage Items
- Setting Up Orchestration Processes for Coverage Items: Fulfillment Lines in
- Same Instance
- Setting Up Orchestration Processes for Coverage Items: Fulfillment Lines in
- Different Instances
- Topics

Setting Up an Orchestration Process to Reduce Inventory When a Sales Order Isn’t

- Picked or Shipped
- Demo
- Practices: Overview
- Summary

Managing Statuses

- Learning Objectives
- Order-to-Cash Process
- Topics
- Managing Statuses
- What Are Statuses?
- Topics
- How Statuses Are Assigned
- Topics
- Status Setup
- Setting Up Status Values
- Setting Up Task Status Conditions
- Process Class and Status Catalog

- Setting Up Status Conditions
- Orchestration Process Status Conditions
- Fulfillment Line Status Conditions
- Practices: Overview
- Summary

Planning Orchestration Processes

- Learning Objectives
- Order-to-Cash Process
- Orchestration Process Planning
- What Is Planning?
- Practice
- Summary

Deploying Orchestration Processes

- Learning Objectives
- Order-to-Cash Process
- Deploying Orchestration Processes
- Releasing and Deploying the Orchestration Process Definition
- Practice
- Summary

Managing Jeopardy

- Learning Objectives
- Order-to-Cash Process
- Topics
- Managing Jeopardy
- What Is Jeopardy?
- Topics
- Managing Jeopardy Priorities
- Topics
- Managing Jeopardy Threshold Definitions
- Demo
- Summary

Promising Orders: Introduction and Overview

- Learning Objectives
- Order Promising
- Functional Architecture: Supply Chain Planning and Oracle Global
- Order Promising
- Functional Integration Touchpoints
- Functional Components
- Key Functionality
- Advanced Fulfillment Techniques

- Promising of Configure-to-Order Items
- Work Area for Managing Order Backlog
- Summary

Promising Orders: Rules

- Learning Objectives
- Topics
- Sourcing Rules
- Global and Local Sourcing Rules
- Global Sourcing Rules and Assignment
- Creating Sourcing Rules
- Assigning Sourcing Rules
- Supported Assignment Levels for Global Sourcing
- Sourcing Rule and Assignment Setup: Example
- Local Sourcing Rules
- Demo
- Topics
- ATP Rules
- Promising Attributes: Promising Modes
- Promising Mode: Supply Chain Availability Search
- ATP Rule Assignment
- Demo
- Practice
- Summary

Promising Orders: Key Functionality

- Learning Objectives
- Topics
- Order Promising Workflow
- Check Availability: Key Features
- Check Availability
- Alternate Availability Options
- Reviewing Promising When You Prioritize and Reschedule Order Lines
- Promising Only After You Release Holds On Lots
- Topics
- Capable-to-Promise
- Topics
- Profitable-to-Promise
- Demo
- Topics
- Fulfillment Line Splits
- Topics
- End Item Substitution
- Topics
- Support Advanced Fulfillment Techniques

- Topics
- CTO Promising
- Topics
- Global Order Promising Work Area
- Demo
- Summary

Promising Orders: Administration and Data Collection

- Learning Objectives
- Topics
- Data Collections for Global Order Promising
- Collected Data
- Collecting Data from Ad Hoc Processes
- Setting Up Data Collection from Ad Hoc Processes
- Consume Supply for Draft Orders When Collecting Data
- Data Collections Using File-Based Import
- Global Order Promising Data You Can Collect Through File-Based
- Data Import
- Order Management Data You Can Collect Using File-Based Data Import
- Data Collection Configuration Summary
- Data Collection from Files: Uploading the File
- Data Collection from Files: Running the Scheduled Process
- External Source System Setup
- Cross-Reference Data Collections Setup Detail
- Viewing the Cross-Reference Collected Data Setup Detail
- Topics
- Administration: When Not to Restart the Global Order Promising Engine
- High-Volume Order Promising: Functionality It Enables
- Using Pick-Pack Lead Time
- Enabling Real-Time On-Hand and In-Transit Supply Data for
- Available-to-Promise Calculations
- Reduce Inventory When a Sales Order Doesn’t Require Picking or Shipping
- Enabling Inventory Reduction When a Sales Order Doesn’t Require
- Picking or Shipping
- Enabling Inventory Reduction When a Sales Order Doesn’t Require Picking or
- Shipping (continued)
- Administration: Real-Time Supply Update
- Summary

Shipping Orders: Overview

- Learning Objectives
- Topics
- Shipping Process Flow and Users
- Integrated Trade Compliance in Oracle Inventory
- Integrated Transportation in Oracle Inventory Management

- Integrating with an External Manufacturing System
- Topics
- Pick Release Process Flow
- Topics
- Ship Confirm Process Flow
- Topics
- Quick Shipment
- Demo
- Summary

Shipping Orders: Basic Setup

- Learning Objectives
- Topics
- Shipping Parameters
- Shipping Parameters: General
- Shipping Parameters: Pick Release
- Shipping Parameters: Shipment Grouping
- Topics
- Carriers
- Topics
- Shipping Cost Types
- Topics
- Shipping Documents
- Shipping Document Job Sets
- Managing Shipping Document Job Set Rules
- Managing Shipping Document Output Preferences
- Shipping Document Sequences
- Topics
- Shipping Exceptions
- Topics
- Shipping Lookups
- Topics
- Shipping Process Flow and User Roles
- Demo
- Practice
- Summary

Shipping Orders: Manage Pick Waves

- Learning Objectives
- Topics
- What Is a Pick Wave?
- Pick Wave Usage
- Pick Release Process Options
- Pick Release
- Topics

- Movement Request
- Topics
- Pick Wave Release Rule
- Demo
- Topics
- Release Sequence Rules
- Topics
- Picking Rules
- Picking Rule Assignments
- Topics
- Pick Slip Grouping Rule
- Shipping Document Job Sets
- Practice
- Summary

Shipping Orders: Confirm Picks

- Learning Objectives
- Topics
- Pick Confirmation: Overview
- Pick Confirmation Process
- Release Process Options
- Topics
- Manual Pick Confirmation Setup
- Automatic Pick Confirmation Setup
- Demo
- Practice
- Summary

Shipping Orders: Confirm Shipment

- Learning Objectives
- Topics
- What Is Ship Confirm?
- Pick Release and Ship Confirmation Process Options
- Topics
- One-Step Shipping
- Ship Confirmation
- Ship Confirmation Actions
- Topics
- Shipping Confirmation Rules
- Topics
- Ship Confirm Rule: Shipping Parameters
- Consolidation of Backordered Lines
- Topics
- Shipment Consolidation
- Practice

- Summary

Revising Orders

- Learning Objectives
- Topics
- Order-to-Cash Process
- Change Order Processing
- Topics
- Business Flow: Revise Order
- Revising an Order
- Search for Multiple Sales Orders and Apply Actions to Them
- High-Level Steps to Enable Search and Action to Multiple Sales Orders
- Creating Your Search Indexes
- Managing Your Search Indexes
- Setting Up Your Search View
- Revise Order – Copying Data from Another Order
- Change Processing: Concepts
- Change Processing: Before
- Change Processing: Evaluating the Differences
- Change Processing: Compensating the Process
- Change Processing: Result
- Updating Orders with Split Lines Resulting from Partial Shipment: Overview
- Updating Orders with Split Lines Resulting from Partial Shipment: Creating
- a Revision
- Change Management on Updates to a Fulfillment Line That Was Split for
- Partial Shipment
- Enabling Update of Split Order Lines for Partial Shipment
- Applying Actions on Multiple Sales Orders
- Summary

Setting Up Change Order Processing

- Learning Objectives
- Order-to-Cash Process
- Change Order Processing
- Change Management Setup: Overview
- Topics
- Change Management and Change Attributes
- Change Management and Processing Constraints
- Topics
- Compare Change Order to Fulfillment Values
- Topics
- Change Management Attributes on the Orchestration Process Definition
- Topics
- Order Attributes That Identify Change (Change Attributes)
- Topics

- Compensation
- Demo
- Practice
- Summary

Managing Holds

- Learning Objectives
- Order-to-Cash Process
- Managing Holds
- Topics
- Holds in Order Management
- Topics
- Applying Holds Manually
- Applying Holds Automatically
- Topics
- Releasing Holds Manually
- Releasing Holds Automatically
- Topics
- Setting Up Holds on the Manage Hold Definitions Page
- Setting Up Holds Using Order Management Extensions
- Demo
- Summary

Understanding External Integration

- Learning Objectives
- Topics
- External Integration: Introduction
- Managing Integration with Order Management
- Topics
- Managing External Interface Web Service Details
- Topics
- Oracle Integration for Oracle SaaS
- Topics
- Manage External Interface Routing Rules
- Topics
- Business Event Notification
- Business Event Trigger Points
- Topics
- Fulfill Order Task Layer
- Topics
- Custom Task Layer
- Demo
- Summary

Overview of Project-Driven Supply Chain

- Introducing Project-Driven Supply Chain
- Project-Driven Supply Chain
- Features of Project-Driven Supply Chain
- Summary of Actions Needed to Use Execute Project-Specific Manufacturing
- Associated Training
- Additional Resources

Conclusion

- Learning Objectives
- Order-to-Cash Process
- Optional Practice