

Oracle PeopleSoft Order Management

Oracle's PeopleSoft Order Management is an order-to-cash solution that enables customers, partners and employees to select the right products and services, negotiate the best prices, and ensure timely fulfillment.

Improve Operational Efficiency for your Order-to-Cash Process

PeopleSoft Order Management's quote-to-cash process consists of three main tasks:

- Capturing the perfect order, that consists of functions such as product selection, pricing, promotions, and cross and upsell opportunities.
- Orchestrating flawless fulfillment that consists of advanced logic to determine how a specific order or order line should be processed.
- Executing timely fulfillment that requires order information to flow seamlessly to PeopleSoft Manufacturing, Inventory, Procurement and third-party warehouse management systems.

The PeopleSoft Order Management and fulfillment solution allows the creation of an integrated and seamless, order-to-cash process across the three above tasks by providing these capabilities:

- Accurate capture of customer orders across multiple channels.
- Streamlined orchestration of order details for a seamless fulfillment process.
- Communication and visibility of order status information to customers throughout the order lifecycle.
- Efficient freight shipping and shipment planning process.

The integrated order-to-cash process provided by PeopleSoft Order Management enables companies to realize benefits that include:

- **Enhanced customer experience** through the selection of the right product at the right price, accurate supply visibility that includes alternate sourcing and automatic order status updates from fulfillment systems to multiple channels.
- **Reduced operational costs** through faster order entry, reduced order errors, and reduced manual steps for fulfillment processing.
- **Increased revenue** through margin maximization and faster order fulfillment.

Key Features

- Create and view orders from multiple business units without changing forms or windows.
- Alternate options for sources of supply if product is not readily available.
- Header attribute changes cascade to lines automatically or by user choice.
- Allow multiple payment methods on the same order.
- Calculate and capture deposits required on an order if payment terms dictate prepayment.
- Honor credit holds across business units.
- View margin and target margin input to attain desired margin goals
- Automatic application of Buying Agreement terms and pricing.
- Automatic application of Pricing Rules based on user-defined combinations of order conditions and formulas with embedded Enterprise Pricer product.
- Support customer returns using Return Material Authorizations.
- Allow users to indicate how they wish to interact with the order and quote entry pages.
- Global support for Denied Parties screening, VAT processing, multicurrency and multi-language

Enhanced Customer Service

Select the Right Product at the Right Price from the Right Fulfillment Center

PeopleSoft Order Management works seamlessly with the PeopleSoft Inventory, Purchasing, and pricing applications. PeopleSoft Enterprise Pricer functionality extends Order Management's pricing capabilities with an engine that applies the correct prices, terms, and discounts to every order line, including orders based on negotiated buying agreements. Order Management enables you to define product catalogs to control who can order what goods and services. PeopleSoft Inventory provides visibility into on-hand and incoming stock, so customer service levels can be attained with on-time fulfillment and shipment. When a product is not available, users can request a purchase be made specifically for the customer order using a seamless integration with PeopleSoft Purchasing.

Key Benefits

- Enhanced customer service.
- Reduced order processing costs.
- Increased revenue.

Reduce Errors and Delays through Order Validation and Automatic Defaults

PeopleSoft Order Management enables you to validate an order during the capture process, and ensures that the order has all the necessary and correct information to be processed for fulfillment without errors. Order Management also provides flexible default functionality to automatically provide order data such as payment, carrier, and shipping information to reduce the likelihood of data entry error. This validation not only supports sales orders, it also governs other orders that support order modifications, cancellations, and returns.

Accurate Order Promise Dates

PeopleSoft Order Management works with PeopleSoft Inventory, Manufacturing, and procurement products to create consistent and reliable delivery promise dates. Inventory can be immediately reserved at order entry, or automatically as a requested ship date moves within the allocation window. If material is not readily available in the customer's distribution network, alternate sourcing options are available to get the product to the customer in a timely manner. Sources of supply could be incoming purchase orders or production orders, or if allowed, the CSR or salesperson can create supply to fulfill the demand.

Timely Order Fulfillment with Direct Shipments

PeopleSoft Order Management can fill customer orders by directly shipping the goods from suppliers to the end customer. Customer sales orders are seamlessly communicated from PeopleSoft Order Management to procurement applications and then to the supplier. Customer changes to the sales order and supplier changes to the purchase order are synchronized for real-time order status updates and inquiry. When the supplier communicates the Advanced Shipping Notice (ASN) electronically or through web self-service, the customer can be invoiced.

Increase Revenue with Margin Enforcement

PeopleSoft Order Management enables you to set up margin thresholds, create margin violation order holds, and view margins during order entry. This ensures that orders meet profit goals and enables products to be allocated to the highest margin orders and order lines. In addition, authorized users can enter a target margin percentage, margin amount, or order amount, and the system recalculates pricing on each order line to attempt to attain the desired margin goal. At the same time, minimum selling prices, margin thresholds, and discount and surcharge rules are observed to ensure no margin violations.

Proactively Monitor Order and Customer Service Bottlenecks

PeopleSoft Order Management users can leverage the Messaging and Alerts framework with out-of-the-box alerts that notify them when certain service levels are threatened. A series of proactive notifications can notify individuals or groups of individuals of “Orders Past Their Scheduled Shipment Date”, “Aged Orders on Hold”, and other important information that signals a potential bottleneck in the fulfillment cycle.

Customer service users may also access and personalize a WorkCenter with an option to leverage a Dashboard that monitors conditions they deem important, so they may extend the highest level of service to their customers.

Customer service representatives, inventory and fulfillment staff, and buyers can see various demands against supply from the WorkCenter. Using the links on the left, users can navigate directly to a component to address or manage bottlenecks, arrange for alternate fulfillment options, and collaborate with others in the organization to provide the best service levels to internal or external customers.

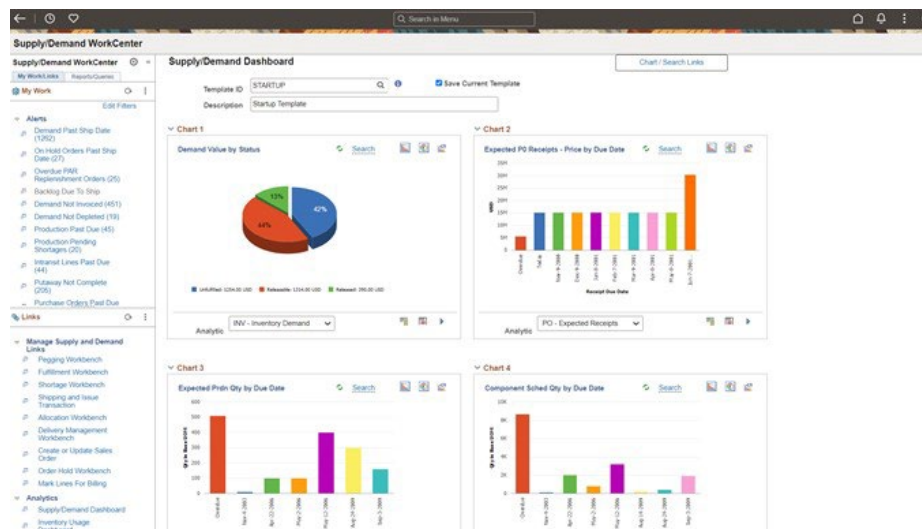


Figure 1. Supply and Demand WorkCenter

Related Products

The following PeopleSoft products integrate and collaborate with Oracle PeopleSoft Order Management:

- Enterprise Pricer
- Inventory
- Purchasing
- Manufacturing
- Project Costing
- Billing
- Receivables

Related Services

The following services support Oracle PeopleSoft Order Management:

- Update Subscription Services
- Product Support Services
- Professional Services

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