

Oracle[®] Depot Repair

Concepts and Procedures

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Understanding Oracle Depot Repair

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Oracle Depot Repair in CRM

With Oracle Depot Repair you can track and manage the complete depot repair process for service organizations. It integrates seamlessly with both back office ERP applications and Oracle CRM Service applications. Thus, it delivers a complete view of customers, products, and service records.

Oracle Depot Repair supports many scenarios that are common in the repair business:

Scenario Title	Scenario Description
Return Repair	A broken product is sent back for repair.
Walk-In Return Repair	A customer delivers a broken product to a repair depot, which fixes and returns the product.
Return Repair with a Loaned Product	A loaned product is sent to a customer to bridge the time that a broken product is being repaired.
Exchange	A replacement product is sent to a customer after a broken product is received for credit or repair.
Advanced Exchange	A replacement product is sent to a customer before a broken product is received for credit or repair.

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Scenario Title	Scenario Description
Replacement	A replacement product is sent to a customer, and no broken product is received for repair.

The scenarios define the Using section of the help system for the application. You can view the scenario that is appropriate for your needs from [Choosing a Repair Scenario](#).

Management of Repair Orders

In the Repair Orders window you can create and update repair orders that are associated with a service request. You can perform the following tasks from the window:

Creating a Repair Order

In the Details tab, you can define and display key information that is associated with a repair order.

Managing a Repair WIP Job

In the Repair Jobs tab, you can list the WIP repair jobs that are associated with a repair order. From this tab you can also open the Repair Jobs window, where you can create a repair WIP job for a repair order.

Diagnosing a Problem

In the Knowledge Base tab, you can search the knowledge base for information that can help to diagnose a repair. If you find a resolution, then you can save the symptom, cause, and action with the repair record.

Displaying Activity for a Repair Order

In the Activity tab, you can display the status and event information associated with a repair order. This information includes the quantity received, the quantity in work in process, and the quantity shipped.

Displaying Service History

In the Service History tab, you can list all the service requests and depot repair orders previously opened against the installed base product on a repair order.

Displaying Product Coverage

In the Product Coverage tab, you can display the configuration and entitlements for the installed base product referenced on a repair order.

In the Repair Type window, you can set up codes for repair types.

Implementing Oracle Depot Repair

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Profile Options

Set profile options for Oracle Depot Repair according to the following table.

Profile Option	Possible Values	User	Resp	App	Site
Profile: OSM: Opportunity Delete Ceiling	Any existent and valid transaction groups (Business Process)	x	x	x	x
Depot Repair: Default Price List for Repairs		x	x	x	x
Depot Repair: Default Expense Item	Any Item from MTL_SYSTEM_ITEMS. This is for roll-up functionality.	x	x	x	x
Depot Repair: Default Material Item	Any Item from MTL_SYSTEM_ITEMS. This is for roll-up functionality.	x	x	x	x
Depot Repair: Default Labor Item	Any Item from MTL_SYSTEM_ITEMS. This is for roll-up functionality.	x	x	x	x
Depot Repair: RMA Line Status for Non Repair Item	This is to update the Installed Base with Product Status. Values should come from a list of Installed Base product statuses.				x
Depot Repair: RMA Line Status for Repair Item	This is to update the Installed Base with Product Status. Values should come from a list of Installed Base product statuses.				x
Depot Repair: Customer Approval Required Default					x

Using Oracle Depot Repair

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Choosing a Repair Scenario

Choose the repair scenario that you want to follow with Oracle Depot Repair:

- [Making a Return Repair](#)
- [Making a Walk-In Return Repair](#)
- [Making a Return Repair with a Loaned Product](#)
- [Making an Exchange](#)
- [Making an Advanced Exchange](#)
- [Making a Replacement](#)

For background and general features of Oracle Depot Repair, refer to [Oracle Depot Repair in CRM](#) in the Understanding section for the application.

Making a Return Repair

Perform the following tasks in the recommended order to make a return repair, in which a broken product is sent back for repair:

1. [Create a service request.](#)
2. [Estimate charges.](#)
3. Get customer approval.

If the customer accepts the estimated charges in step 2, then [create an RMA](#).

If the customer rejects the estimated charges in step 2, then:

- a. [Close the service request.](#)
 - b. End this scenario.
4. [Create a repair order.](#)
 5. If the customer rejected the promise date in the repair order in step 4, then:
 - a. [Close the service request.](#)
 - b. End this scenario.
 6. [Receive a broken product.](#)

7. Diagnose the problem.
8. Revise estimated charges.
9. Revise customer approval.
10. If the customer rejected the revised estimate in step 9, then:
 - a. Close the repair order.
 - b. Close the service request.
 - c. Close the charge line.
 - d. End this scenario.
11. Create a repair WIP job.
12. Process the repair WIP job.
13. Close the repair order.
14. Enter final charges and create a shipment.
15. Ship the repaired product.
16. Invoice the customer.
17. If some items remain to ship or bill, then repeat steps 1 through 16 for those items.
18. If any other activity such as support and field service is incomplete, then complete it.
19. Close the service request.

Making a Walk-In Return Repair

Perform the following tasks in the recommended order to make a walk-in return repair, in which a customer delivers a broken product to a repair depot, which fixes and returns the product:

1. Create a service request.
2. Estimate charges.
3. Get customer approval.

If the customer accepts the estimated charges in step 2, then create an RMA.

If the customer rejects the estimated charges in step 2, then:

- a. Close the service request.
- b. End this scenario.

4. Create a repair order.
5. If the customer rejected the promise date in the repair order in step 4, then:
 - a. Close the service request.
 - b. End this scenario.
6. Receive a broken product.
7. Diagnose the problem.
8. Revise estimated charges.
9. Revise customer approval.
10. If the customer rejected the revised estimate in step 9, then:
 - a. Close the repair order.
 - b. Close the service request.
 - c. Close the charge line.
 - d. End this scenario.
11. Create a repair WIP job.
12. Process the repair WIP job.
13. Enter final charges and create a shipment.
14. Invoice the customer.
15. Ship the repaired product.
16. If some items remain to ship or bill, then repeat steps 1 through 15 for those items.
17. If any other activity such as support and field service is incomplete, then complete it.
18. Close the repair order.
19. Close the service request.

Making a Return Repair with a Loaned Product

Perform the following tasks to make a return repair with a loaned product, in which a loaned product is sent to a customer to bridge the time that a broken product is being repaired:

1. Create a service request.
2. Estimate charges.

3. Ship the loaned product.
4. Get customer approval.

If the customer accepts the estimated charges in step 2, then [create an RMA](#).

If the customer rejects the estimated charges in step 2, then:

 - a. [Close the service request](#).
 - b. End this scenario.
5. [Create a repair order](#).
6. If the customer rejected the promise date in the repair order in step 4, then:
 - a. [Close the service request](#).
 - b. End this scenario.
7. [Receive a broken product](#).
8. [Diagnose the problem](#).
9. [Revise estimated charges](#).
10. [Revise customer approval](#).
11. If the customer rejected the revised estimate in step 9, then:
 - a. [Close the repair order](#).
 - b. Go to step 15.
12. [Create a repair WIP job](#).
13. [Process the repair WIP job](#).
14. [Enter final charges and create a shipment](#).
15. [Ship the returned product](#).
16. Receive the loaned product.
17. [Invoice the customer](#).
18. [Close the repair order](#).
19. If some items remain to ship or bill, then repeat steps 1 through 18 for those items.
20. If any other activity such as support and field service is incomplete, then complete it.
21. [Close the service request](#).

Making an Exchange

Perform the following tasks to make an exchange, in which a replacement product is sent to a customer after a broken product is received for credit or repair:

1. [Create a service request.](#)
2. Get customer approval.
If the customer accepts the terms, then [create an RMA.](#)
If the customer rejects the terms, then:
 - a. [Close the service request.](#)
 - b. End this scenario.
3. [Receive a broken product.](#)
4. [Ship the repaired product.](#)
5. [Invoice the customer.](#)
6. If some items remain to ship or bill, then repeat steps 1 through 5 for those items.
7. If any other activity such as support and field service is incomplete, then complete it.
8. [Close the service request.](#)

Making an Advanced Exchange

Perform the following tasks to make an advanced exchange, in which a replacement product is sent to a customer before a broken product is received for credit or repair:

1. [Create a service request.](#)
2. [Enter final charges and create a shipment.](#)
3. Get customer approval.
If the customer accepts the terms, then [create an RMA.](#)
If the customer rejects the terms, then:
 - a. [Close the service request.](#)
 - b. End this scenario.
4. [Ship the repaired product.](#)
5. [Invoice the customer.](#)

- a. Navigate to **Accounts Receivable**.
 - b. Invoice the customer by normal business procedures.
6. [Receive a broken product](#).
7. If some items remain to ship or bill, then repeat steps 1 through 6 for those items.
8. If any other activity such as support and field service is incomplete, then complete it.
9. [Close the service request](#).

Making a Replacement

Perform the following tasks to make an exchange, in which a replacement product is sent to a customer, and no broken product is received for repair:

1. [Create a service request](#).
2. [Estimate charges](#).
3. [Enter final charges and create a shipment](#).
4. [Ship the repaired product](#).
5. [Invoice the customer](#).
6. If some items remain to ship or bill, then repeat steps 1 through 5 for those items.
7. If any other activity such as support and field service is incomplete, then complete it.
8. [Close the service request](#).

Using Tasks Shared Among Scenarios

The topics in this section provide process-oriented, task-based procedures from which scenarios are constructed.

Creating a Service Request

Perform the following tasks to [create a service request](#):

Prerequisites

None

Steps

1. Navigate to **Service Request**.
2. Identify the customer and the product.
3. In the Knowledge Base tab, identify the symptom.
4. Save the service request.

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Estimating Charges

Perform the following tasks to estimate charges:

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Charges**.
One way to do this is to click **Charges** in the Details tab of the Repair Orders window.
2. Determine the pricing method.
3. If you use fixed pricing, then enter the broken item on the charge line.
4. If you use variable pricing, then enter estimated charges for labor, parts and shipping.
5. Click **Coverage** to review and confirm entitlements.
6. Click **Apply Contract** to apply entitlements and to calculate net charges.

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Creating an RMA

Perform the following tasks to create an RMA:

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Charges**.
2. On the charges line, enter the RMA for the broken item.
3. Click **Submit Order** to send the RMA line to Order Capture/Order Management for assignment of an RMA number.
4. Save the updated Charges window.

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Creating a Repair Order

Use this procedure to create a repair order.

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Repair Orders**.
2. If the Search window appears, then follow the instructions in [Searching for Repair Orders and Service Requests](#).

The Repair Orders window is populated with information from the service request.

3. In the Repair Orders region, confirm the information displayed in the table or enter the appropriate information for the broken product.
4. Negotiate a promise date with the customer.
5. Click **Approval** to enter the customer's approval or rejection of the estimate to complete the repair.

The Customer Approval window appears.

6. Select **Approve** or **Reject** as appropriate, fill out the rest of the fields, and click **OK**.
7. In the Details tab, click **Update Status**.

The Update Status window appears.

8. Select **Open**, optionally enter a reason, and click **OK** to open the repair order.
9. In the **Details** tab, enter the promise date, and select the repair type and the depot owner.
10. Optionally, consult or create notes.
11. Click **Save** to save all the new and updated information in this tab.

Searching for Repair Orders and Service Requests

Use this procedure to search for repair orders and service requests.

Prerequisites

None

Steps

1. Navigate to **Repair Orders**.
The Repair Order Search window appears.
2. In the **Basic** tab, enter available information to limit your search.
3. If necessary, enter additional search criteria in the **Advanced** tab.
4. Click **Search**.
5. Records that satisfy the search criteria populate the **Results** region.
6. Click **OK**.

Receiving a Broken Product

Perform the following tasks to receive a broken product:

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Receiving**.
2. Enter RMA receipt transactions.
3. Navigate to **Concurrent Program**.
4. Run the Depot Repair Receiving concurrent program.

5. Run the Installed Base Receiving concurrent program.
6. Navigate to **Inventory Move**.
7. Move broken items to subinventory locations of the repair depot.

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Diagnosing a Problem

Use this procedure to diagnose a repair problem.

Prerequisites

Perform the previous steps in this scenario in the recommended order. Usually this involves creating a service request. In doing so, you define the problem.

You must be dealing with a case that requires diagnosis. This excludes, for example, a case such as returning a defective product for credit.

Steps

1. Navigate to **Repair Orders**.
2. If the Search window appears, then follow the instructions in [Searching for Repair Orders and Service Requests](#).
The Repair Orders window is populated with information from the service request.
3. In the Knowledge Base tab, click **Knowledge Base** to open the Knowledge Base window.
4. Search the knowledge base for symptom, cause, and action.
5. Save the results of the knowledge base search with the repair order number.
6. Close the Knowledge Base window to return to the Repair Orders window.
7. In the Details tab, click **Depot Notes**, and record an original estimate and a revised estimate.
8. Save and close the note window to return to return to the Repair Orders window.

9. Click **Save** to save the updated repair order with the information from the knowledge base and the depot note.

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Revising Estimated Charges

Perform the following tasks to estimate charges for a broken product:

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Charges**.
2. If necessary, enter a revised estimate.
3. Save the estimated charges.
4. [Close the service request](#).

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Revising a Repair Order

Use this procedure to revise a repair order.

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Repair Orders**.
The Repair Orders window is populated with information from the service request.
2. Identify the broken product by entering a item number and, optionally, a serial number.
3. Discuss the revised charges with the customer.

4. Optionally, consult or create notes.
5. Click **Approval** to enter the customer's approval or rejection of the estimate to complete the repair.

The Customer Approval window appears.

6. Select **Approve** or **Reject** as appropriate, fill out the rest of the fields, and click **OK**.

Creating a Repair WIP Job

Use this procedure to create a repair WIP job.

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Repair Orders**.
2. Confirm or enter the broken product by entering a item number and, optionally, a serial number.
3. Click **Repair Jobs** to open the Repair Jobs window.
4. Enter the repair organization and other WIP job parameters in the header of the window.

The repair organization must be an inventory organization that is valid for the product ID in the product field and that is valid for your operating unit.

5. Click the **Search** icon on the Toolbar to perform a search.

The Search window appears.

6. Specify the search criteria for items in the repair orders table.

Only repair orders whose service request has an operating unit equal to one in your responsibility are included in the table. The search criteria can be:

- a. The inventory organization that you will assign to the repair WIP jobs being created.

You can enter and select any inventory organization that is valid for any operating unit in your current responsibility.

- b. The product item number for the repair job being created.

The number must be valid for the repair organization.

7. Click **Search** to populate the repair orders table with items that meet the search criteria.
8. Select the desired repair orders, and click **OK** to return to the Repair Jobs window.
9. Select the items in the repair orders table to be included in the total quantity.
10. Click **Submit Job** to create a WIP repair job using the parameters in the header and the total quantity in the repair orders table.
11. Click **Close** to close the Repair Jobs window.

Processing a Repair WIP Job

Perform the following tasks to process a repair WIP job:

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **WIP**.
2. Optionally, print shop paper for items such as the router, the move tickets, and the parts list.
3. Optionally, create a parts kit.
4. Issue the broken item to the repair job (work order).
5. Move the broken item through router steps while recording labor and time.
6. Complete and close the repair job (work order).
7. Navigate to **Inventory**.
8. Move the repaired item to the pickable/shipping inventory location.

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Entering Final Charges and Creating a Shipment

Perform the following tasks to enter final charges and to create a shipment:

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Charges**.
2. Create the sales order to return the repaired product to the customer.
3. Click **Submit Order** to create a sales order.
4. Save and close the Charges window.

Guidelines

For additional information, refer to the online help for the windows used in this topic.

Shipping a Returned Product

Perform the following tasks to ship a returned product. Depending on details of the scenario, the product can be repaired or not.

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Shipping**.
2. Complete the pick, pack, and ship confirm transactions.
3. Navigate to **Concurrent Manager**.
4. Run the Depot Repair Shipping Concurrent Program.
5. Run the Installed Base Shipping Concurrent Program.
6. Close the repair order line.

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Invoicing a Customer

Perform the following tasks to invoice a customer.

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Accounts Receivable**.
2. Invoice the customer by normal business procedures.

Guidelines

For additional information, refer to the generic online help for the windows used in this topic.

Closing a Repair Order

Use this procedure to close a repair order.

Prerequisites

Perform the previous steps in this scenario in the recommended order.

Steps

1. Navigate to **Repair Orders**.
2. Confirm or enter the repaired product by entering a item number and, optionally, a serial number. Confirm that the quantity on the order is complete.
3. Optionally, consult or create notes.
4. In the Details tab, click **Update Status**.
The Update Status window appears.
5. Select Close, optionally enter a reason, and click **OK** to close the repair order.

Click **Save** to save all the new and updated information for this tab.