

SCM Cloud

Getting Started with Service Logistics Implementation

24A



Copyright © 2023, Oracle and/or its affiliates.

Author: Stacey Tucker-Blosch

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Get Help	i
<hr/>	
1 About This Guide	1
Purpose and Scope	1
How to Use This Guide	2
Find Guides, Release Readiness Documents, and Other Resources	2
2 Get Started With Your Implementation	5
Overview of Service Logistics	5
Enable the Functional Areas for Service Logistics Implementation	6
Enable Service Logistics Functionality for Users	6
Enable Support for Third Party Work Objects	17
3 Stocking Locations	19
How Do We Use Stocking Locations	19
Set Up Your Stocking Locations	19
4 Field Service Technicians	21
Overview of Field Service Technicians Setup	21
Assign Stocking Locations To Technicians	22
Edit Stocking Locations Assigned to Technicians	22
5 Billing Types	23
Overview of Billing Types	23
Assign Billing Types to Billing Categories	23
6 Service Activities	25
Understand Service Activities	25
Set Up Service Activities	25


7	Charges Posting Rules	27
	Explain Charges Posting Rules	27
	Set Up Charges Posting	28
8	Return Routing Rules	31
	What is Return Routing?	31
	Create and Manage Return Routing Rules	31
9	Service Logistics Lookups	33
	List of Service Logistics Lookups	33
	Manage Service Logistics Lookups and Lookup Codes	38
10	Service Logistics Profile Options	39
	List of Service Logistics Profile Options	39
	Manage Service Logistics Profile Options	39
11	Service Logistics Parts Search Program	41
	Configure Parts Search	41
12	Related Oracle Cloud Products	43
	Overview	43
	Fusion Service	44
	Manufacturing and Supply Chain Materials Management	45
	Product Master Data Management	47
	Maintenance Management	51
	Pricing Administration	53
	Subscription Management	54
	Global Order Promising	55
	Order Management	55
13	Depot Repair	61
	What Do I Need to Set Up for Depot Repair?	61
14	Preventive Maintenance of Customer Assets	63
	Set Up Field Service Preventive Maintenance	63

15	Integration With Oracle Projects	65
	Setting Up Integration With Oracle Projects	65
16	Descriptive Flexfields	67
	Set Up Additional Information Using Descriptive Flexfields	67

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 About This Guide

Purpose and Scope

This guide helps you set up the data that you require to use Oracle Fusion Service Logistics.

Scope of This Guide

This guide covers the minimum set of tasks required to configure Oracle Fusion Service Logistics for your business requirements. You will learn how to:

- Enable Service Logistics and create users.
- Set up stocking locations.
- Assign stocking locations to field service technicians.
- Manage billing types.
- Set up service activities.
- Define return routing rules.
- View and edit lookups.
- Manage profile options.
- Set up the Service Logistics parts search program.
- Set up other Cloud products in order to order parts, create debrief, and post charges.
- Set up depot repair and preventive maintenance of customer assets.

References and Help

This guide has references to other guides wherever required. Unless otherwise specified, you can access help from the Oracle Applications Help portal or from the Oracle Cloud Documentation Library.

For more information about the full implementation of the Service Logistics offering and implementing advanced features within the offering, see the Integrating Service Logistics with Field Service and the Using Service Logistics guides.

For more information about subscribing to an Oracle Cloud Service trial, see the Getting Started with Oracle Cloud guide.

Note: With release 20A (11.13.20.01.0), "Oracle Engagement Cloud" is now known as Oracle CX Sales and Oracle Fusion Service. Existing Oracle Engagement Cloud users will retain access to Oracle CX Sales and Fusion Service features under their preexisting licensing agreements. Any new users created within your current Oracle Engagement Cloud license count will also retain the same access to Oracle CX Sales and Oracle Fusion Service. To obtain additional features or manage your subscription, refer to your Oracle Cloud Applications Console. This document describes features available to users under Oracle CX Sales, Oracle Fusion Service, and Oracle Engagement Cloud licensing agreements.

How to Use This Guide

This section explains the prerequisites for getting started with your implementation.

Prerequisites

Before performing the steps in this guide, you must set up the common enterprise structure objects. To get started, you also require access to Oracle Identity Management and Oracle Fusion Applications.

For more information, see the *Implementing Common Features for Oracle SCM Cloud* guide.

Assumptions

You must have a valid user name and password to sign in to the application and access the work areas.

Find Guides, Release Readiness Documents, and Other Resources



The Oracle Help Center (<https://docs.oracle.com>) has guides, videos, release readiness documents, and other resources for Oracle Applications Cloud.

- Guides give you cumulative information about all features in each cloud service, for example how to use, set up, and extend them.
- Release readiness documents tell you what's new or changed in a particular release update. This material is published before the update happens, to help you prepare for it.

In the application, when you click links in help windows, most of the time you open a specific guide in the Help Center. From there, you can search or browse to find other content. Or, if you're on the [oracle.com](https://www.oracle.com) site, open the main menu and select **Documentation** in the Product Help menu group to get to the Help Center. It's a good idea to bookmark the Help Center.

Let's take a look at how you can move around and find what you're looking for in the Help Center.

Browse for Cumulative Content About a Cloud Service

Here's how you find guides, videos, and other resources:

1. From anywhere in the Oracle Help Center, open the main menu and click **Cloud Applications**. Or, click **Cloud Applications** on the Help Center home page.
2. On the Cloud Documentation page, browse the cloud services which are organized in categories.
3. Click the name of your cloud service.
4. On the main page for the cloud service, select a release update if you don't want to see the latest content.

5. Use the navigation pane to get to a specific guide, video, or other resource. Here are some examples of where you might go:
 - Books or Videos: Get all the videos or guides for the cloud service.
 - On the Videos or Books page, you can use the **View** list to filter by category.
 - Most guides are available in multiple formats, for example HTML and PDF.
 - Tasks: Click a task category and then a specific, common task to go straight to information that will help you with that task.
 - REST API: Get reference information about REST APIs.

Tip: Use the breadcrumbs to get to other parts of the Help Center.

Search Within or Across Guides

The scope of the search in the global header of the Oracle Help Center depends on the page you're on. For example, on the Cloud Documentation page, you search across guides for all cloud services. On the pages for a specific cloud service, you search only within that service, which gives you more targeted results. If you want to search within one guide, use the Search tab in the guide.

From the search results, find the entry you want and click one of the two links for that entry:

- The first link takes you to the beginning of the relevant chapter.
- The second link takes you directly to the part of the chapter that has the summary text that you see in the search result.

Review Release Readiness Documents

Let's find the release readiness material that can help you prepare for your next quarterly update:

1. On a page in the Oracle Help Center for your cloud service, click **Cloud Readiness / What's New** in the navigation pane.
2. On the main page in Oracle Cloud Readiness for your service, find the What's New subsection under the Essential Content section.
3. Click **HTML** or **PDF** to open a What's New document in a new browser tab.
4. Click the release update you want to review.
5. In the table of contents, click **Feature Summary** to see which features are enabled or disabled by default. You need to take action to make disabled features available to your users.
6. If you see an Opt In Expiration tab, click it to see when disabled features will become enabled by default.
7. Click the tab for your release update to go back and see the details about specific features.
8. Return to the browser tab with the main page for your cloud service to explore other release readiness content. From there you can also jump over to other cloud services.

2 Get Started With Your Implementation

Overview of Service Logistics

Service Logistics delivers field service capability and supply chain functionality enabling users to source and order parts for field service and parts only service, review debrief lines and submit charges for parts, labor, and expenses incurred.

Using the Service Logistics work area, you can order parts for service requests and work orders that are created in Oracle Fusion Service UIs. You can also order parts for third party service requests and work orders. You can set up a variety of field stocking locations and manage the trunk stock of these stocking locations as well as the inventory of field service technicians. Service Logistics also offers depot repair functionality so that you can manage the repair and return of broken parts.

Service Logistics is part of Oracle Fusion Supply Chain Management Cloud and interacts with Oracle Fusion Service and other Supply Chain Management cloud products to support customer and field service as well as manage preventive maintenance work on customer-owned assets.

Dependencies on other SCM Cloud Products

Using Service Logistics, you can source and order customer replaceable and technician replaceable parts, as well as capture customer part returns. Service Logistics depends on data set up in various other Supply Chain Management products such as Oracle Fusion Inventory Management, Oracle Order Management Cloud Service, Oracle Fusion Pricing, Oracle Fusion Global Order Promising, Oracle Maintenance Cloud, Oracle Subscription Management Cloud, and Oracle Product Master Data Management to offer this functionality.

For information on the dependencies and the data that must be set up to use Service Logistics, see: [Setting Up Related Products](#).

Interaction with Fusion Service

As a Service Logistics user, you will be able to source and order service parts and initiate returns using the parts functionality in the Fusion Service: Create Service Request and Create Work Order pages.

For information on the roles and privileges required to enable this functionality, see: [Enabling Features for Parts Ordering using Fusion Service UIs: Procedure](#).

Support for Third Party Service Requests and Work Orders

Using Service Logistics, you can create and manage part requirements for third party service requests and work orders. Field Service Administrators can also review the debrief information for third party work orders and submit charges to generate sales invoices.

Integration with Oracle Field Service Cloud

You can also choose to download and set up the integration of Service Logistics with Oracle Field Service under the Customer Experience offering. This integration synchronizes field service technicians, their stocking locations, and corresponding inventory balances to Oracle Field Service. It allows field service technicians to search for, order, and receive parts from Supply Chain Cloud as well as upload parts, labor, and expense debrief transactions back to the Supply Chain Cloud for billing, costing, and updating inventory and the installed base asset configuration.

For information on setting up the integration of Service Logistics with Field Service, see the Integrating Service Logistics with Field Service guide.

Enable the Functional Areas for Service Logistics Implementation

To access the setup tasks for Service Logistics, enable Service Logistics as a functional area under the Manufacturing and Supply Chain Materials Management offering.

1. Click the Navigator, and then click **Setup and Maintenance**.
2. On the Setup page, select the **Manufacturing and Supply Chain Materials Management** offering from the drop-down list.
3. On the Setup Manufacturing and Supply Chain Materials Management, click **Change Feature Opt In**.
4. On the Opt In: Manufacturing and Supply Chain Materials Management page, select the check box in the **Enable** column for the functional area: Service Logistics.
5. Click **Done**.

Enable Service Logistics Functionality for Users

You can create users for the functionality that you plan to use.

Note: You should create your own unique job roles and enable only the functionality that you plan to use. For more information see the Advisory Note on Subscription Impact in the Security Reference for Manufacturing and Supply Chain Materials Management guide.

Enable Service Logistics Functionality by Assigning Privileges for Users

Service Logistics offers the following predefined job roles:

- Field Service Administrator
- Depot Repair Manager
- Field Service Technician Duty (CRM offers a predefined job role called Field Service Technician, for which Service Logistics has predefined duty roles).

The following table shows the privilege names and the predefined job roles that are associated with them.

Note: You should use these privileges to create your own unique job roles.

Available Roles and Privileges

Role	Privilege Name	Code/Technical Name	Functionality Enabled
Depot Repair Manager	Access Activities Using Web Service	RCL_ACCESS_ACTIVITIES_BY_SERVICE	Allows the user to access activities using a service.

Role	Privilege Name	Code/Technical Name	Functionality Enabled
Field Service Administrator Field Service Technician Duty			
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Access Asset Hierarchy Using Web Service	RCL_ACCESS_ASSET_HIERARCHIES_BY_SERVICE	Allows the user to access the asset hierarchy using a service.
Field Service Administrator	Access Create Charges and Estimates	RCL_CREATE_CHARGES_ESTIMATES	Allows the user to create charges and estimates from the Manage Work Orders and Charges page.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Access Debrief Page	RCL_PORTAL_VIEW_DEBRIEF	Allows the user to access the Manage Charges and Estimates page.
Depot Repair Manager	Access Depot Repair for Depot Repair Manager	RCL_DEPOT_DETAILS_PRIV	Allows the depot repair manager to manage RMA lines, which includes creating repair orders and transfer orders, and adding and editing charges.
Depot Repair Manager	Access Depot Repair Manager Infolets	RCL_DEPOTMGR_INFOLETS	Allows the user to access Depot Repair Manager infolets.
Depot Repair Manager	Access to Depot Repair Page for Depot Repair Manager	RCL_DEPOT_DETAILS	Allows a depot repair manager to take actions required for an RMA line, including the creation of repair order, transfer order, and to add and edit charges.
Depot Repair Manager	Access Depot Repair Search	RCL_DEPOT_REPAIR_SEARCH_PRIV	Allows user to search for a return material authorization (RMA).
Field Service Technician Duty	Access Field Service Technician Infolets	RCL_TECHNICIAN_INFOLETS	Allows the user to access the field service technician infolets.
Field Service Administrator	Access Field Service Administrator Infolets	RCL_FSADMIN_INFOLETS	Allows the user to access the field service administrator infolets.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Access Items Using Web Service	RCL_ACCESS_ITEMS_BY_SERVICE	Allows the user to access items using a service.

Role	Privilege Name	Code/Technical Name	Functionality Enabled
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Access Manual Adjustments Basis Using Web Service	RCL_ACCESS_MANUAL_ADJUSTMENTS_BASIS_BY_SERVICE	Allows the user to access the manual adjustments basis using a service.
Field Service Administrator	Access Parts Requirements Search for Administrator	RCL_ADMIN_PARTS_REQUIREMENTS_SEARCH_PRIV	Allow field service administrator to search for parts requirements.
Field Service Technician Duty	Access Parts Requirements Search for Technician	Access Parts Requirements Search for Technician	Allows field service technician to search for parts requirements.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Access Parts Shipping Methods Using Web Service	RCL_ACCESS_PARTS_SHIPPINGMETHODS_BY_SERVICE	Allows the user to access parts shipping methods using a service.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Access Profile Values Using Web Service	RCL_ACCESS_PROFILE_VALUES_BY_SERVICE	Allows access to rclProfiles REST API.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Access Service Logistics Landing Page	RCL_PORTAL_ACCESS_LANDING_PAGE	Allows the user to access Service Logistics Landing page.
Field Service Administrator Field Service Technician Duty	Access Standalone Parts Ordering Page	RCL_PARTS_ACCESS_STANDALONE_PAGE	Allows the user to access the Standalone Parts Requirement page.
Field Service Administrator Field Service Technician Duty	Access Stocking Location Details Using Web Service	RCL_ACCESS_STOCK_LOC_DETAILS_BY_SERVICE	Allows access to stockingLocations REST API.
Field Service Administrator Field Service Technician Duty	Access Trunk Stock Details Using Web Service	RCL_ACCESS_TRUNK_STOCK_DETAILS_BY_SERVICE	Allows access to trunkStocks REST API.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Access Work Order Charges Search Page	RCL_WORK_ORDER_CHARGES_PRIV	Allows the user to search for work orders with existing debrief headers on the Work Order Charges Search page. Redwood UX
Field Service Administrator	Access Work Order Charges Details Page for Administrator	RCL_ADMIN_CREATE_EDIT_DEBRIEF_DETAILS_PRIV	Allows an administrator to view and update work order

Role	Privilege Name	Code/Technical Name	Functionality Enabled
			transactions on the Work Order Charges detail page. Redwood UX
Field Service Technician Duty	Access Work Order Charges Details Page for Technician	RCL_FSTECH_CREATE_EDIT_DEBRIEF_DETAILS_PRIV	Allows a technician to view and update work order transactions on the Work Order Charges detail page. Redwood UX
Field Service Administrator	Access to Work Order Charges Header for Administrator	RCL_ADMIN_CREATE_EDIT_DEBRIEF_HEADER_PRIV	Allows an administrator to create debriefs for work orders on the Work Order Charges header page. Redwood UX
Field Service Technician Duty	Access to Work Order Charges Header Page for Technician	RCL_FSTECH_CREATE_EDIT_DEBRIEF_HEADER_PRIV	Allows a technician to create debriefs for work orders on the Work Order Charges header page. Redwood UX
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Create Debrief Transactions Using Web Service	RCL_PORTAL_CREATE_DEBRIEF_TRANSACTIONS_BY_SERVICE	Allows access to the Debrief REST API.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Create Maintenance Work Orders by Service	MNT_CREATE_WORK_ORDERS_BY_SERVICE	Allows ability to call Create SCM Work Order and Operations REST API.
Field Service Administrator Field Service Technician Duty	Create Parts Return List	RCL_CREATE_PARTS_RETURN_LIST	Allows the submission of the process that creates field service parts return list.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Edit Price	RCL_EDIT_PRICE	Allows access to Price Manual Adjustment dialog.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Get Project List Using Service	PJF_GET_PROJECT_LIST_PRIV	A privilege that allows integrations with Projects.
Depot Repair Manager	Get Project Setups	PJF_GET_PROJECT_SETUPS_PRIV	A privilege that allows integrations with Projects.

Role	Privilege Name	Code/Technical Name	Functionality Enabled
Field Service Administrator Field Service Technician Duty			
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Get Project Tasks Service	PJF_VIEW_PROJECT_TASK_SERVICE_PRIV	A privilege that allows integrations with Projects.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Import Order	FOM_IMPORT_ORDER	Required by service request to create a sales order.
Field Service Administrator	Manage Auto Processing Rule	RCL_AUTO_PROCESSING_RULES	Allows the ability to manage the autoprocessing rule.
Depot Repair Manager Field Service Administrator	Manage Customer Assets	CSI_MANAGE_CUSTOMER_ASSETS	Allows the creation and update of customer assets, related configurations, and structures.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Manage Customer Assets by Service	CSI_MANAGE_CUSTOMER_ASSETS_BY_SERVICE	Allows the creation and update of customer assets, related configurations, and structures.
Depot Repair Manager	Manage Depot Repair	RCL_DEPOT_REPAIR	Allows the user to access to the Project Tasks LOV REST service to view the list of project tasks.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Manage Estimates	RCL_MANAGE_ESTIMATES	Allows the user access to Manage Work Orders and Charges, Manage Estimates (New), Create Charges, and Edit Charges.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Manage Inventory Reservation and Picks	INV_MANAGE_INVENTORY_RESERVATION_AND_PICKS	Allows the management of inventory reservations and picks.
Depot Repair Manager	Manage Maintenance Work Order Operations	MNT_MANAGE_MAINTENANCE_WORK_ORDER_OPERATIONS	Allows the addition and update of work order operations.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Manage Manual Price Adjustments Using Web Service	RCL_MANUAL_PRICE_ADJUSTMENTS_BY_SERVICE	Allows the user to manage manual price adjustments using a service.

Role	Privilege Name	Code/Technical Name	Functionality Enabled
Field Service Administrator Field Service Technician Duty	Manage Part Requirements using Web Service	RCL_MANAGE_PART_REQUIREMENTS_BY_SERVICE	Allows access to partRequirementLines REST API.
Depot Repair Manager Field Service Administrator	Manage Preventive Maintenance of Customer Owned Assets	RCL_PREVENTIVE_MAINTENANCE	Allows the submission of the process that creates preventive maintenance tasks for customer-owned assets.
Depot Repair Manager Field Service Administrator	Manage Resource to Item Mapping	RCL_RESOURCE_ITEM_MAPS	Allows the ability to manage resource to item mapping.
Depot Repair Manager Field Service Administrator	Manage Return Routing Rules	RCL_MANAGE_RETURN_RULES	Allows access for Return Routing Rules Import/Export SOAP service.
Depot Repair Manager Field Service Administrator	Manage Return Routing Rules Using Web Service	RCL_MANAGE_RETURN_RULES_BY_SERVICE	Allows access to Manage Return Routing Rules using a service.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Manage Supply Orchestration Web Services	DOS_MANAGE_SUPPLY_ORCHESTRATION_WEB_SERVICES	Required by Work Orders to create an internal material transfer.
Field Service Administrator	Mapping Internal and External Locations Using Web Service	RCL_INT_EXT_LOC_MAPPINGS_DETAILS_BY_SERVICE	Allows the user to access internal and external locations mapping using a service.
Depot Repair Manager Field Service Administrator	Post Charges	RCL_POST_CHARGES	Allows the user to post charges.
Field Service Technician Duty	Post Charges with Rule Check	RCL_POST_CHARGES_RULE_CHECK	Allows the user to post charges with rule check.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Price Sales Transactions	QP_PRICE_SALES_TRANSACTIONS	Required by Service Request and Work Order to price the parts requirement.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Receive Parts	RCL_PORTAL_RECEIVE_PARTS	Allows access to Receive Parts page.

Role	Privilege Name	Code/Technical Name	Functionality Enabled
Field Service Administrator Field Service Technician Duty	Report Maintenance Material Transactions by Service	MNT_REPORT_MATERIAL_TRANSACTIONS_BY_SERVICE	Allows the ability to create material transactions using SCM Work Order REST API.
Field Service Administrator Field Service Technician Duty	Report Maintenance Resource Transactions by Service	MNT_REPORT_RESOURCE_TRANSACTIONS_BY_SERVICE	Allows the ability to create resource (labor) transactions using SCM Work Order REST API.
Depot Repair Manager Field Service Administrator	Setup Billing Types	RCL_BILLING_TYPES_SETUP	Allows access to the Manage Billing Types page.
Depot Repair Manager Field Service Administrator	Setup Service Activities	RCL_SERVICE_ACTIVITIES_SETUP	Allows access to the Manage Service Activities page.
Field Service Administrator	Setup Stocking Location	RCL_STOCKING_LOC_SETUP	Allows access to Manage Stocking Locations page.
Field Service Administrator	Setup Technician	RCL_TECHNICIAN_SETUP	Allows access to the Manage Field Service Technicians page.
Field Service Administrator Field Service Technician Duty	Submit Automatic Posting of Debrief Charges	RCL_AUTOPROCEES_DEBRIEF_CHARGES	Allows submission of the process that automatically posts debrief charges.
Field Service Technician Duty	Technician Access Charges and Estimates	RCL_FSTECH_CHARGES_ESTIMATES	Allows the technician the ability to create charges and estimates from the Manage Work Orders and Charges page.
Field Service Technician Duty	Technician Access for Field Parts Inventory	RCL_FSTECH_PARTS_INVENTORY	Allows the technician access to the Field Parts Inventory page.
Field Service Technician Duty	Technician Access for Manage Part Requirements	RCL_FSTECH_MANAGE_PART_REQ	Allows the technician access to the Manage Part Requirements page.
Field Service Technician Duty	Technician Access for Receive Parts	RCL_FSTECH_RECEIVE_PARTS	Allows the technician access to the Receive Parts page.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	Update Maintenance Work Orders by Service	MNT_UPDATE_WORK_ORDERS_BY_SERVICE	Allows the ability to call update for the SCM Work Order REST API in order to update the status.
Depot Repair Manager Field Service Administrator	Use Location Service	PER_USE_LOCATION_SERVICE	Allows the use of the location service.

Role	Privilege Name	Code/Technical Name	Functionality Enabled
Field Service Technician Duty			
Depot Repair Manager Field Service Administrator Field Service Technician Duty	View Customer Assets	CSI_VIEW_CUSTOMER_ASSETS	Allows the user to query and view customer assets, related configurations, and structures.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	View Maintenance Work Orders by Service	MNT_GET_WORK_ORDERS_BY_SERVICE	Allows the ability to get details about existing SCM work orders using REST API.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	View Planning Supply Availability	MSP_VIEW_PLANNING_SUPPLY_AVAILABILITY	Required by Service Request and Work Order to use Global Order Promising to source the parts.
Depot Repair Manager Field Service Administrator	View Requirement Lines	RCL_PARTS_REQ_VIEW	Allows access to Parts Requirement region for the Fusion Service work order creation page, and the Manage Parts Requirement page.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	View Receivables Invoice	AR_VIEW_RECEIVABLES_INVOICE	Allows access to view a receivables invoice.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	View Subscription Adjustments	RCL_VIEW_SUBSCRIPTION_ENTITLEMENTS_BY_SERVICE	Allows access to subscription entitlements for contract discounts in the Charges and Parts Requirement page.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	View Subscription Entitlements	OSS_VIEW_SUBSCRIPTION_ENTITLEMENTS	Allows the ability to change the subscription user status.
Depot Repair Manager Field Service Administrator Field Service Technician Duty	View Technician Portal Work Orders	RCL_PORTAL_VIEW_WO	Allows access to the Manage Work Orders and Charges page.
Field Service Administrator	View Trunk Stock	RCL_PORTAL_VIEW_TRUNK_PARTS	Allows the user view access to the Manage Field Parts Inventory page.

Assign Data Security Policies to Job Roles

You must set up the data security policies (DSP) for the job roles that you create. The following table shows which DSPs are needed to perform Service Logistics functionality. For some of these data security policies, you must also set up the user data access:

1. When you're creating a job role, you'll need to add the desired data security policies in the Edit Role page.

Data Security Policies

Job Roles	Policy Name	Policy Description	Data Resource	Privilege	Condition	Functionality	Is the User Data Access Setup Required?
Depot Repair Manager Field Service Administrator	Grant on Application Reference Data Set	Allows you to manage a location.	SetID Set	Manage Location;	All values	Allows the user to query and create an internal location ship-to address (from a TCA ship-to address) when creating transfer orders.	No
Depot Repair Manager Field Service Administrator	Grant on Business Unit	Allows you to view receivables activities for the business units for which you're authorized.	Business Unit	View Receivables Activities;	Access the business units for which you're authorized.	Allows the user to drill down to the Invoice Details page from the Manage Charges and Estimates page.	Yes
Field Service Administrator	Grant on Cost Organization	Allows you to view work order costs.	Cost Organization	View Work Order Costs;	All values	Allows access to the work order cost data in Oracle Transaction Business Intelligence (OTBI).	No
Field Service Administrator	Grant on Cost Organization	Allows you to view a cost organization.	Cost Organization	View Cost Organization;	All values	Allows access to the cost data for OTBI.	No

Job Roles	Policy Name	Policy Description	Data Resource	Privilege	Condition	Functionality	Is the User Data Access Setup Required?
Field Service Administrator	Grant on Cost Organization	Allows you to view a COGS event for the cost organizations for which you're authorized to view.	Cost Organization	View COGS Event;	All values	Allows access to the unit cost data in OTBI.	No
Depot Repair Manager Field Service Administrator	Grant on Installed Base Asset	Allows you to manage an installed base asset.	Installed Base Asset	Read; Manage Installed Base Asset; Update; Delete;	All values	Allows access to the Asset UI to make updates from the Manage Work Orders and Charges page.	No
Depot Repair Manager Field Service Administrator	Grant on Inventory Organization	Allows you to manage an inventory reservation for the inventory organizations for you're authorized.	Inventory Organization	Manage Inventory Reservation;	Access the inventory organization parameter for table INV_ORG_PARAMETERS for the inventory organizations for which you're authorized.	Allows the user to add and delete reservations in the Service Logistics UIs: Manage Field Parts Inventory UI Reservations dialog. Access Service Work Order Parts Details tab PR Table X icon. Create and Edit Part Requirements UI PR Table X icon.	Yes

Job Roles	Policy Name	Policy Description	Data Resource	Privilege	Condition	Functionality	Is the User Data Access Setup Required?
						Create debrief lines. Post charges.	
Depot Repair Manager	Grant on Inventory Organization	Allows you to manage a maintenance organization for the inventory organizations for which you're authorized.	Inventory Organization	Manage Maintenance Organization;	Access the inventory organization parameter for table INV_ORG_PARAMETERS for the inventory organizations for which you're authorized,	Allows the user to create and update maintenance work orders.	Yes
Depot Repair Manager Field Service Administrator	Grant on Location	Allows you to manage a location.	Location for Table PER_LOCATION_DETAILS_F	Manage Location;	All values	Allows the user to query and create an internal location ship-to address (from a TCA ship-to address) when creating transfer orders.	No
Depot Repair Manager Field Service Administrator	Grant on Location	Allows you to manage a location.	Location for Table PER_LOCATIONS	Manage Location;	All values	Allows the user to query and create an internal location ship-to address (from a TCA ship-to address) when creating transfer orders.	No

2. Set up the user's data access in the Manage Data Access for Users page.

Note: Duty roles are not visible in the Manage Data Access for Users page.

For a listing of the data security policies that are associated with a job role, refer to the Roles chapter in the Security Reference for Manufacturing and Supply Chain Materials Management Guide.

Enable Support for Third Party Work Objects

To manage parts logistics and field service debrief and charges for third party objects:

Set up the document type lookup for the third party service request or work order in the Service Logistics lookup `ORA_RCL_SOURCE_DOC_TYPE`. For details, see the Managing Service Logistics Lookups chapter.

3 Stocking Locations

How Do We Use Stocking Locations

Stocking locations are used to stock inventory and spare parts. In Service Logistics, you can set up various stocking location types, such as manned, unmanned, site dedicated stocking locations as well as technician stocking locations.

You will then assign these stocking locations to all the field service technicians that can use parts from them. Each field service technician must be assigned one default usable and defective trunk stock location. Service agents order parts from central warehouses and ship them to the field stocking locations where the parts will be used by the field service technicians. Field service administrators can also transfer parts from one stocking location to another to replenish the warehouse or the inventory of field service technicians. You can also use field stocking locations to track both usable and defective parts.

Set Up Your Stocking Locations

Set up a stocking location:

1. Under **Setup and Maintenance**, select the Manufacturing and Supply Chain Materials Management offering, and then click **Service Logistics**. See the list of tasks displayed for Service Logistics on the right-hand pane. Click **Manage Stocking Location**.
 2. On the Manage Stocking Location page, click the **Add** icon (**Plus** icon).
 3. In the Add Stocking Location window:
 - Select the organization from the list of valid inventory organizations.
 - Select a subinventory from the list of subinventories that appear for the selected organization. Note that the word subinventory is the industry equivalent of a warehouse.
 - Select the type of field parts stocking location. The four seeded values are **Technician**, **Manned**, **Unmanned**, and **Site Dedicated**.
 - The condition as either **Usable** or **Defective**.
- Note:** Field parts stocking locations must have been set up as Inventory Organizations and Subinventories before they can be set up as Service Logistics stocking locations.
4. Save your record.
 5. When you set up a site dedicated stocking location, you will be able to add or remove party site addresses to it. On the Manage Stocking Locations page, you will see an icon under the Address column against each site dedicated location. Click on the icon to access a Details window. You can add the site addresses here.
 6. Follow the same process to set up another stocking location.

Related Topics

- [Create Parts Return List](#)

4 Field Service Technicians

Overview of Field Service Technicians Setup

Overview of Field Service Technicians Setup Field service technicians must be set up as person parties in Oracle Trading Community Architecture (TCA) with the usage code Field Service Technician. Field service technicians must also be assigned an address. To do this:

1. Go to the Customer Data Management cloud application and click on **Persons**.
2. In the Persons page, select the employee that must be set up as field service technician.
3. Click on the person name to access the Edit Person page.
4. To add an address, go to the Addresses section in this page. Click on the + (Add) icon to add an address.
5. Next, click the Usage Assignment tab.
6. Click **Actions, Add** and then select **Field Service Technician** from the **Usage** drop-down list.

Note that if you haven't assigned the Field Service Technician usage code, then the first time a stocking location is assigned to a technician, the usage type of Field Service Technician is assigned to the person party.

After you have set up the field service technicians you can see their information in the Manage Field Service Technicians page in Service Logistics. You can also assign stocking locations to the field service technicians.

1. Click **Setup and Maintenance**, then under the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Manage Field Service Technicians**.
2. To find the field service technician, use the following search fields:
 - Technician = List of values displays TCA person parties with the Field Service Technician usage.
 - Organization = List of values displays all organizations that have at least one subinventory defined.
 - Subinventory = List of values displays all the subinventories defined for the selected organization.
3. Click **Search**. The field service technician details will appear in the search results table.

In the next section, you will learn how to assign stocking locations to field service technicians to enable them to stock and manage the parts or items that they require to fulfill a work order. These stocking locations represent the technician's trunk stock. Stocking locations set up as the technician's default usable and defective subinventory default into transfer order destinations and can be used in the parts debrief process. Note:

- You can assign multiple stocking locations to field service technicians.
- Every technician must be assigned one default usable and defective stocking location.

Field service administrators use the Manage Trunk Stock page in Service Logistics to monitor the stocking levels of each item in the technician's trunk stock. Field service administrators can create transfer orders to replenish the technician's trunk stock when the item levels fall below the minimum level as well as receive parts shipped to a technician.

Related Topics

- [Create Parts Return List](#)

Assign Stocking Locations To Technicians

Assign a stocking location to a field service technician:

1. On the Manage Field Service Technicians page, use the search fields to find a field service technician.
2. Click the **Add** icon (**Plus** icon) in the search results table to add a stocking location to the field service technician.
3. In the Add Stocking Location window:
 - Select an organization from the list of valid organizations.
 - Select a subinventory from the list of valid subinventories that appear for the selected organization.
 - Check **Enable** to ensure the technician can use the selected subinventory.
 - Check **Default** to make this the default subinventory of the technician.
 - Check **Allow Parts Orders** to assign privileges to the field service technician to order parts. Do not select this check box if you only want the field service technician to create the part requirement but not order the part. You may want to do this when the part requirements raised by the field service technician must first be approved by the field service administrator or parts coordinator.
4. Click **Save and Create Another** to save the details you have entered and open the Add Stocking Location window to assign another stocking location to the field service technician.
5. Enter the required information. Click **Save and Close**.

Edit Stocking Locations Assigned to Technicians

To edit the stocking locations assignment and preferences for a selected field service technician:

1. Under **Setup and Maintenance**, select the Manufacturing and Supply Chain Materials Management offering. Click Service Logistics and then click **Manage Field Service Technicians** in the setup task list.
2. On the Manage Field Service Technician page, select a technician in the **Technician** field, and click **Search**.
3. From the list of stocking locations assigned to the technician that appears, select the row you want to edit.
4. Click the **Edit** icon.
5. On the Edit Stocking Location page, you can select to check or clear the following:
 - **Enabled:** When selected, the specified subinventory is available for the technician's use. Clear the check box to make this subinventory unavailable for the technician's use.
 - **Default:** When selected, the specified subinventory will be the default subinventory of the technician. Clear the check box to remove this subinventory as the default one for the technician.
6. Click **Save and Close**.

5 Billing Types

Overview of Billing Types

To enable billing types for ordering parts, debriefing parts, entering labor and expenses and for creating fixed charges, you must assign billing types to items in the item master.

For more information on updating the Item Master with the billing type see Item Specifications and Attributes: Explained, in the Using Product Master Data Management guide.

How are Billing Types used in Service Logistics?

When you set up service activities for your organization, you will need to associate billing types with service activity codes (SACs) to define which items in the Item Master will be used for the selected service activity. Service activity codes are entered when a user creates a part requirement for a service request and determines whether the resulting sales order is for a shipment or a return order line. The association of the service activity code with the billing type controls which items or parts can be selected in the part requirements user interfaces. Note that SACs aren't required for work order part requirements as the service activity code is entered later when creating the parts debrief line. SACs are also used in field service debrief.

You can also use billing types and service activity codes to define subscription coverage for calculating charges.

Billing types also determine the list of service activities that are displayed when creating part, labor, and expense debrief transactions as well as the service activity required to add fixed charge items to a work order. Billing types help filter the list of items available for selection.

You can associate multiple billing types with a service activity code. For example, a service activity of type Installation can be used for both parts and labor debrief.

Assign Billing Types to Billing Categories

In this section, you will learn how to assign billing types to billing categories.

There are four seeded billing types in Service Logistics: Material, Consumable, Labor, and Expense. You can create your own billing types using the lookup EGP_MATERIAL_BILLING_TYPE.

The billing category determines which SACs and items are displayed in the Manage Debrief and Charges page through the billing type assigned to the items and SACs. There are four non-extensible billing categories seeded in Service Logistics: Labor, Expense, Fixed Charge, and Material. Note that you can't create your own billing categories.

To assign billing types to the billing categories:

1. Click **Setup and Maintenance**, then under the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Manage Billing Types**.
2. On the Manage Billing Types page, select the billing type and then select a billing category to assign it to.
3. You can click on the **Add** icon (**Plus** icon), if you want to add another billing type.

6 Service Activities

Understand Service Activities

Service agents select a service activity when they create a service request part requirement for customer replaceable parts. Service Activities:

- Filter the item list of values. Only items with billing types associated with the selected service activity code are displayed in the list of values.
- Determine the transaction category, whether the resulting sales order line will be a shipment order line or a return order line.
- Determine the order line type for the part requirement that will drive the correct orchestration process to be launched after the sales order is created. Order line types that drive the order orchestration and accounting processes are set up in Order Management.
- Specify if and how to create the underlying charge line, and if the corresponding charge lines should be submitted to Order Management.

Service activity codes are also selected during field service debrief where they're used to calculate charges for both field service and parts only service billing. Service activities filter the list of items when creating part, labor, and expense debrief transactions through the billing types associated with the service activity. You will also select the service activity to filter fixed charge items.

You must set up at least one service activity code for shipping parts to customers and one service activity code for returning defective or excess parts. You must also set up service activity codes for parts exchange, field service, and depot repair.

You will then associate at least one billing type to each service activity code. For information on how the billing type and service activity code association controls the service items that can be selected when creating a part requirement, see: Billing Types: Overview.

Note: If you don't need to create sales orders, then you can skip the order-related setups in the Set Up Service Activities section that follows.

Set Up Service Activities

To set up service activities:

1. Under **Setup and Maintenance**, select the Manufacturing and Supply Chain Materials Management offering. Click **Service Logistics** and then click **Manage Service Activities**.
2. Click the **Add** icon (**Plus** icon) to add a new Service Activity.
3. In the **Service Activity Code** field, enter a unique code for the service activity you're defining.
4. In the **Service Activity** field, enter a name for the service activity you're defining, for example, Customer Return.
5. In the **Description** field, enter a description for the service activity, for example, returned from customer.

6. For **Transaction Category**, depending on the service activity you're defining, select from the values:
 - **Order**
 - **Return goods**
7. For **Business Process**, depending on the service activity you're defining, select from the values:
 - **Customer support**: Select to set up service activities related to parts sales and returns
 - **Parts Exchange** : Select to set up service activities for parts exchange (broken part is returned by customer and replacement part is shipped as part of the same transaction)
 - **Field service**: Select to set up service activities related to field service debrief
 - **Depot Repair**: Select to set up service activities related to depot repair debrief
 - **Depot Repair Logistics**: Select to set up service activities for depot repair return and shipment
8. For **Order Type**, select from the drop-down list. List of values is derived from the lookup ORA_DOO_ORDER_TYPES. This will be the default sales order type for the corresponding service activity.

Note: The **Order Type** field is not required. If you don't need to create sales orders, then confirm that the Create Order check box isn't selected. This ensures that the **Order Type** and **Order Line Type** fields aren't required.
9. For **Order Line Type**, select from the values that appear depending on the transaction category you have selected.
10. Select a **Resource Activity** if you want to map your service activity code to the work order resource activity code. This applies to field service and depot repair only. See topic Map Work Order Resource Activities to Service Logistics Activities in Chapter 7 for information about how this mapping works.
11. Select the **Create Order** check box to control which charge lines created in Service Logistics are passed to Order Management. If this check box is selected, the charge line is passed to Order Management so that customers can be invoiced accurately. Don't select this check box if you want the order orchestration process to be carried out in a third-party Order Management application.
12. Select the **Zero Charge** check box if you don't want to charge customers for parts covered under a warranty or a contract, or for additional labor or extra parts that weren't planned for the original repair.
13. Select the **Update Cost** check box to control whether or not costs are updated when you post charges.
14. **Enabled** is checked by default.
15. Click **Save**.
16. To associate the service activity you set up to a billing type, in the Billing Type region, click the **Add** icon (**Plus** icon).
17. Select the appropriate billing type for the service activity.
18. Click **Save and Close** to save the changes and close the Manage Service Activities page.

7 Charges Posting Rules

Explain Charges Posting Rules

There are two ways to post charges in Service Logistics. You can post them manually or you can set them up to post automatically.

You can either manually post or automate the posting of charges for generic, OFSC and third-party work orders. You must opt-in for the Automatically Post Charges feature.

- **Manual Posting**

For manual posting of charges:

- Review the debrief lines and post the charge lines manually using the Post Charges option in the Manage Charges and Estimates page (for field service debrief).

This field service debrief and posting functionality is enabled and ready to use.

- Confirm the Post Charges or Post Charges with Rules privileges have been assigned to users so they can see the **Post Charges** button in the Manage Charges and Estimates page.

Users who don't have these privileges assigned see the **Complete Debrief** button in the Manage Charges and Estimates page. When they click this button, the debrief line status is updated to the Needs Review status or the Posted status based on the auto processing rule check. When the charge line is in Needs Review status, the field service administrator will review the debrief line and post charges.

- **Automatic Posting**

For automatic posting of charges:

- Set up automatic processing rules for charges. If the debrief lines meet the criteria specified in the rule, the rule check processes. If the rule check runs successfully, the charges are posted and the sales order is created. If there are errors, the debrief status updates to Needs Review. The field service administrator must then review the debrief and post charges.

This feature is useful in large-scale businesses that have hundreds of debrief transactions from work orders. For example, you could set up a rule to:

- Find debrief charges for business unit ABC.
- Automatically post debrief charge lines for amounts less than 2500 USD.
- Manually review and post debrief charges that are greater than 2500 USD.

Note: The Service Logistics landing page has a Needs Review infolet. When a field service administrator reviews these debrief lines, they see the reason a charge line wasn't posted along with any conditions that failed a rule check.

Related Topics

- [Auto Process Debrief Charges](#)

Set Up Charges Posting

In this section, you will learn how to set up rules to post charges in Service Logistics.

Following are the setups to automatically post charges.

Opt in for the Automatically Post Charges Feature

1. Click the **Navigator** then select the **Setup and Maintenance** work area.
2. In the Setup page, select the **Manufacturing and Supply Chain Materials Management** offering.
3. From the list of functional areas, select **Service Logistics**.
4. Click on the Actions drop-down button, and then click **Change Feature Selection**.
5. Enable the **Automatically Post Charges** feature.

Define the Automatic Processing Rules

1. In the Setup and Maintenance work area, go to the **Manage Auto Processing Rule** task:
 - o Offering: Manufacturing and Supply Chain Materials Management
 - o Functional Area: Service Logistics
 - o Task: Manage Auto Processing Rule
2. The Manage Auto Processing Rules for Charges page contains the following regions:
 - o Rules search criteria
 - o Rule names results table
 - o Qualifiers
 - o Conditions
3. To create a new rule, click on the Add rule (+) icon in the Search Results table.
4. Enter the rule name and description.
5. Notice that the value of the Enabled field is set to **Yes** by default.
6. Define the qualifiers and conditions for the rule. There are seeded qualifiers and conditions that you can use.
 - o Qualifiers: Customer, Business Unit, Technician, Document Type, Work Order Type, Service Request Category
 - o Conditions: Labor Hours, Expense Amount, Charge Line Amount, Total Charge Amount, Actual Over Estimates %
7. After you have defined the qualifiers and conditions, click **Save**.
8. Note the following:
 - o The rule name should be unique.
 - o It isn't required to specify a qualifier. When a specific attribute isn't assigned to a qualifier, the rule applies for all the business qualifiers.
 - o The same qualifier (for example, Business Unit) can be selected multiple times in a rule (in different lines) to assign the rule to multiple values of the same qualifier (for example, rule R1 can be assigned to three Business Units BU1, BU2 and BU3).
 - o The same qualifier and qualifier value should not be entered again.
 - o At least one condition is required for a rule to be saved.

- Either the lower limit or upper limit is required for a condition line to be saved successfully.

After you have set up the rules, you can view, edit, and update these rules in the Manage Auto Processing Rules for Charges page.

- You can update the existing qualifiers and conditions of a rule.
- You can add new qualifiers and conditions to the rule.
- You can delete existing qualifiers and conditions. You must retain at least one condition to retain the rule itself.
- To suspend the rule, select **No** in the **Enabled** field.
- To delete a rule, select the rule at the rule header region and click on the delete button in the results table.

8 Return Routing Rules

What is Return Routing?

When customers, field service technicians, and field parts stocking location administrators return defective parts, they must be transferred to the appropriate warehouse or repair location.

Excess parts in a field stocking location or a technician's trunk stock must also be returned to the optimal warehouse.

As a field service administrator, you can set up return routing rules to automatically determine the warehouse to which these parts must be returned. Routing rules are a combination of values such as zone or stocking location, item category, and item number that are applied to select a destination warehouse. These rules are used in the Add Part and Return Part windows of the Service Logistics application. In the next section, learn how to create return routing rules for your organization.

Create and Manage Return Routing Rules

You can create the following types of return routing rules using the Manage Return Routing Rules page in Service Logistics:

- Return routing rules for defective parts returned by the customer.
- Return routing rules for defective and excess parts returned from field stocking locations and field technicians.
- Return routing rules for parts with supplier warranty coverage.

To create the return routing rules:

1. Click **Setup and Maintenance**, then under the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Manage Return Routing Rules**.
2. You will see the Manage Return Routing Rules page with a **Search** header and results region. Here you can query for the return routing rules for your organization after you have set them up.
3. To add a new rule, click the **Add (Plus)** icon in the Search Results region. You will see the Add Return Routing Rule window.
4. Add values for the new rule:
 - Select a **Return Source Type**. This could either be **Zone** or **Organization and Subinventory**. Use Zone to create a return routing rule for a customer return. Use Organization and Subinventory to create the rule for all field service returns.
 - **Source Organization** and **Source Subinventory**: Enabled only if the return source type is **Organization and Subinventory**. List of values includes all inventory organizations and subinventories with a stocking location type of **Field Technician**.
 - **Zone**: Enabled only if return source type is Zone. Includes all zones set up in the Manage Shipping Zones page using the zone type defined in the Service Logistics Profile Option (Return Routing Zone Type). When a customer returns a part, a TCA API runs to determine the applicable return routing zone based on the customer's address. The zone determines which return routing rule is applied to default the destination subinventory.
 - **Return Type**: Defective, Excess, or Supplier Warranty.

- **Item Catalog** and **Item Category**: Helps to filter the item list of values if you're going to set up return routing rules for specific items. You can create return routing rules at just the item category level.
- **Item**: LOV displays all items with billing type tied to the Material billing category and, if entered, the item category.
- **Destination Organization**: The inventory organization.
- **Destination Subinventory**: All subinventories in the destination organization selected.
- **Enabled**: Select **Yes** or **No** to indicate whether this rule should be enabled for your organization or not.

5. Click **Add**.

9 Service Logistics Lookups

List of Service Logistics Lookups

Refer to the table for a list of the lookups that Service Logistics uses. You can only view and edit the extensible lookups in the Manage Service Logistics Lookups UI.

Name/Code	Description	Seeded Values	Extensible?
EGP_MATERIAL_BILLABLE_TYPE	Identifies items used in Service Logistics debrief and parts ordering.	CONSUMABLE, LABOR, MATERIAL, EXPENSE	Yes
ORA_RCL_ADDRESS_TYPE	Categorizes the shipping address into different address types.	CUSTOMER, TECHNICIAN, WAREHOUSE	No
ORA_RCL_BILLING_CATEGORY	Identifies the item as Labor, Material, Expense, or a Fixed Charge item.	EXPENSE, LABOR, MATERIAL, FIXCHARGE	No
ORA_RCL_BUSINESS_PROCESS	Identifies the type of service being provided to the customer. All service activity codes are assigned to one of these business processes.	FLDSRV (Field Service), CUSTSUPPORT (Customer Support), DEPOTREPAIR (Depot Repair), EXCHANGE (Parts exchange), DRLOGISTICS (Depot Repair Logistics).	No
ORA_RCL_COST_ORG_PRF_VAL	Specifies whether to default the cost organization from the asset operating organization or the field technicians default subinventory in the Manage Charges page and API.	ASSET, TECHNICIAN	No
ORA_RCL_DEBRIEF_STATUS	Defines the status of a debrief line.	NEW, POSTED, ERROR	No
ORA_RCL_ESTIMATE_STATUS	Indicates whether the estimated charges are new, awaiting approval, approved, rejected, or canceled.	NEW, AWAITING_ APPROVAL, APPROVED, REJECTED, CANCELED	No
ORA_RCL_IMT_STATUS	Indicates the status of a material transfer.	SHIPPED, NOTSHIPPED, SHIPPEDLATE, NOTSHIPPEDLATE, SUBMITTED, SUPPLY_REQUEST, CANCEL_SUBMITTED	No
ORA_RCL_PART_SOURCING_CS	Defines part search methods and sequences for customer support part requirements.	MANNED, GOP	No

Name/Code	Description	Seeded Values	Extensible?
ORA_RCL_PART_SOURCING_FS	Defines part search methods and sequences for field service parts requirements.	SITE_DDCTD (Site Dedicated), TECHNICIAN, UNMANNED, MANNED, GOP (Global order promising sourcing method), REPLENISH (Inventory replenishment rules)	No
ORA_RCL_QUANTITY_LEVEL	Indicates the quantity level of items or parts in the technicians' trunk stock.	SHORTAGE, EXCESS	No
ORA_RCL_RET_RULE_SRC_TYPE	Identifies the source type for the return routing rules.	INV (organization and subinventory), ZONE (zone)	No
ORA_RCL_RETURN_TYPE	Identifies the return routing rule type.	DEFECTIVE, EXCESS, SUPPLIER WARRANTY	No
ORA_RCL_SOURCE_DOC_TYPE	<p>Identifies the Service Logistics source document type, for example, whether it's a service work order or service request from the Fusion Service UIs or a third party work order or service request.</p> <p>Note: See the Use the Document Type Lookup to Create Custom Document Types section that follows for more information.</p>	<ul style="list-style-type: none"> EC_SR (Engagement Cloud Service Request) EC_WO (Engagement Cloud Work Order) REPLENISHMENT (Replenish Technician Trunk Stock) REPL_WAREHOUSE (Replenish warehouse) 	Yes
ORA_RCL_STOCK_LOC_CONDITION	Identifies whether the stocking location is good/usable or defective.	GOOD, DEFECTIVE	No
ORA_RCL_STOCK_LOC_TYPE	Identifies the stocking location type.	TECHNICIAN, UNMANNED, MANNED, SITE_DDCTD (Site Dedicated Warehouse)	No
ORA_RCL_USAGE_CODE	Identifies how a part is used to resolve the work order.	USED, UNUSED, DOA(defective on arrival)	No
ORA_RCL_WORK_AREA	<p>Identifies the work areas on Fusion Service work orders and Oracle Field Service Cloud (OFSC) activities. The lookup meaning must match the work area string on the Fusion Service work order.</p> <p>Used as a filter on the Service Logistics landing page and the Manage Work Orders and Charges</p>	None.	Yes

Name/Code	Description	Seeded Values	Extensible?
	<p>page when searching for Fusion Service work orders.</p> <p>Used as a filter in the Manage Part Requirements page.</p> <p>Used to default the FS Tech inventory organization in the Add Part window when parts are added to a work order before a field technician has been assigned to the Fusion Service work order. The default destination inventory organization is entered for each work area in the Tag column of the lookup.</p> <p>OFSC Work Areas</p> <p>We are using the work area lookup when setting a value for the profile Default Parent Resource Name. The value from this profile is used to assign a parent node when creating technician and truck resources in OFSC. The lookup code should be equal to the External ID in OFSC. The parent resource must already exist. It isn't possible to create a resource without a parent through REST services.</p> <p>Work Area is another type of resource in OFSC. The resource type has the role Bucket. The resource name is passed to the Fusion Service work order and is stored on the work order (must match the work area lookup meaning in Service Logistics).</p>		
ORA_RCL_YES_NO	Indicates a yes or no condition.	Y, N	No

Use the Document Type Lookup to Create Custom Document Types

You can also use the document type lookup (ORA_RCL_SOURCE_DOC_TYPE) to create custom document types. The following table shows the seeded document types that you can use as well as the tag information you will need for your custom document types. These tags determine where your custom lookups appear within Service Logistics.

Document Type Lookup

Document Type	Tag	Seeded	Where does this document type appear?	Where is this document type stored?
Replenish Technician Trunk Stock	Null	Yes	Manage Part Requirements (display only)	Part Requirement Header

Document Type	Tag	Seeded	Where does this document type appear?	Where is this document type stored?
Lookup Code: REPLENISHMENT			Create/Edit Part Requirement (LOV value)	
Replenish Warehouse Lookup Code: REPL_WAREHOUSE	Null	Yes	Manage Part Requirements (display only) Create/Edit Part Requirement (LOV value)	Part Requirement Header
Return Material Authorization Lookup Code: RMA	Null	Yes	Depot Repair Workbench (display only) Depot Repair in Redwood UI	Debrief Header
Service Request Lookup Code: EC_SR	Null	Yes	Manage Part Requirements (display only) Create/Edit Part Requirement (LOV value) Part Requirements Search page in Redwood UI (filter chip) Part Requirements Header Page in Redwood UI (LOV value) Part Requirement Detail page in Redwood UI (display only)	Part Requirement Header
Work Order Lookup Code: EC_WO	Null	Yes	Manage Part Requirements (display only) Create/Edit Part Requirement (LOV value) Part Requirements Search page in Redwood UI (filter chip) Part Requirements Header page in Redwood UI (LOV value) Part Requirement Detail page in Redwood UI (display only) Manage Work Orders and Charges (display only) Manage Charges and Estimates, Edit (display only)	Part Requirement Header Debrief Header

Document Type	Tag	Seeded	Where does this document type appear?	Where is this document type stored?
			<p>Manage Charges and Estimates, Create (LOV value)</p> <p>Work Order Charges Search page in Redwood UI (filter chip)</p> <p>Work Order Charges Header page in Redwood UI (LOV value)</p> <p>Work Order Charges details page in Redwood UI (display only)</p>	
Customer-defined Service Request	EC_SR	No	<p>Manage Part Requirements (display only)</p> <p>Create/Edit Part Requirement (LOV value)</p> <p>Part Requirements Search page in Redwood UI (filter chip)</p> <p>Part Requirements Header Page in Redwood UI (LOV value)</p> <p>Part Requirement Detail page in Redwood UI (display only)</p>	Part Requirement Header
Customer-defined Work Order	EC_WO	No	<p>Manage Part Requirements (display only)</p> <p>Create/Edit Part Requirement (LOV value)</p> <p>Part Requirements Search page in Redwood UI (filter chip)</p> <p>Part Requirements Header page in Redwood UI (LOV value)</p> <p>Part Requirement Detail page in Redwood UI (display only)</p> <p>Manage Work Orders and Charges (display only)</p> <p>Manage Charges and Estimates, Edit (display only)</p>	Part Requirement Header Debrief Header

Document Type	Tag	Seeded	Where does this document type appear?	Where is this document type stored?
			<p>Manage Charges and Estimates, Create (LOV value)</p> <p>Work Order Charges Search page in Redwood UI (filter chip)</p> <p>Work Order Charges Header page in Redwood UI (LOV value)</p> <p>Work Order Charges details page in Redwood UI (display only)</p>	

Manage Service Logistics Lookups and Lookup Codes

To manage the lookups for Service Logistics:

1. Under **Setup and Maintenance**, select the Manufacturing and Supply Chain Materials Management offering. Click **Service Logistics**, and then click **Manage Service Logistics Lookups**.
2. The lookups available for Service Logistics are displayed on the Manage Service Logistics Lookups page.
3. To edit a lookup, select **Edit** from Actions, or click the **Edit** icon or click on the lookup name.
4. The Standard Lookup Type region gives information on the meaning, description, the module the lookup is used by, whether it's extensible, and REST access secured.
5. The Lookup Codes region displays the lookup codes associated with the lookup. For existing lookup codes, you can edit the display sequence to specify the order in which the lookup codes are available for selection.
6. To add a lookup code, select **New** from Actions, or click the **Add** icon (**Plus** icon).
7. In the **Lookup Code** field, enter a value for the lookup code you want to add. This is a required field.
8. Optionally, in the **Display Sequence** field, enter a value to specify the sequence of how the lookup code will appear in the list of values.
9. The **Enabled** check box is selected by default.
10. In the **Start Date** field, enter a starting date for the use of this lookup code.
11. In the **End Date** field, enter the end date for the use of this lookup code.
12. In the **Meaning** field, enter a value for the lookup code that would be visible for selection in the list of values. This is a required field.
13. Optionally, in the **Description** field, enter a description for the lookup code.
14. Optionally, in the **Tag** field, enter a tag for the lookup code.
15. Click **Save and Close**.
16. Click **Done** to close the Manage Service Logistics Lookups page and return to the Service Logistics Tasks list.

10 Service Logistics Profile Options

List of Service Logistics Profile Options

As a field service administrator, you can view and manage the profile options for Service Logistics. Service Logistics uses the following profile options:

- **ORA_RCL_DEF_COST_ORG:** To specify that field service costs for parts, labor, and expenses are assigned to the inventory and maintenance organization of the field service technician who debriefed the transactions.
- **ORA_RCL_DEF_DEPOT_SAC_OSP:** To specify the default service activity used for outside processing items of depot repair order.
- **ORA_RCL_ITEM_STRUCTURE:** To specify the Service BOM Item Structure Name.
- **RCL_DEF_DEPOT_SAC_ISSUE:** To specify the default service activity used for parts issued to depot repair order.
- **RCL_DEF_DEPOT_SAC_RECOVER:** To specify the default service activity used for parts recovered from depot repair order.
- **RCL_DEF_DESTINATION_ORGANIZATION:** To specify the default destination organization where parts will be shipped when a part requirement is created for a work order and before a field service technician has been assigned to the work order.
- **RCL_DEF_EMPLOYEE_NAME:** To specify the default employee to be used as the preparer name and deliver-to name while creating a transfer order.
- **RCL_DEF_FS_FALLBK_ASSET:** To specify the fallback asset when an asset wasn't captured in the debrief header. The fallback asset is used by the Post Field Service Charges program to create the maintenance work order that updates inventory, installed base, and cost accounting.

This profile is only for posting Field Service charges. It isn't relevant for Depot Repair.

- **RCL_DEF_PARENT_RESOURCE:** To specify the default parent resource name from Oracle Field Service which is used when downloading technicians, stocking locations, and inventory balances to Oracle Field Service.
- **RCL_DEF_RETURN_ORGANIZATION:** To specify the default return organization where the part returned by the customer is to be received, set the profile option Default Return Organization. The organization is selected by default in the Create Return Line in the Service Request Parts Tab. This profile is used when no Return Routing Rule has been set up that covers the customer or inventory return.
- **RCL_DEF_WORK_ORDER_AREA:** To specify the default work order area displayed when the user launches the Service Logistics landing page.
- **RCL_RETURN_ROUTING_ZONE_TYPE:** To specify the zone type used by the Service Logistics Manage Return Routing Rules setup UI.

Manage Service Logistics Profile Options

To view and manage profile options:

1. Click **Setup and Maintenance**, then under the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Manage Service Logistics Profile Options**.

2. The Manage Service Logistics Profile Options page lists the profile options used by the product. To view details of a profile option, click on the profile option name.
3. The Search Results: Profile Option region displays details of the profile option code, the profile display name, the application and its module that uses the profile option, the start and end dates, and the description of the profile option.
4. The Profile Values region displays the profile level set for the profile option. You can only edit a profile option to select a profile level for it.
5. To edit the profile level for a profile option, you can select **Edit** from Actions, or click the **Edit** icon.
6. In the **Profile Level** field, select from **Site** or **User**. This is a required value.
7. Optionally in the **Profile Value** field, select an organization from the list of values.
8. Click **Save and Close**.
9. Click **Done** to close the Manage Service Logistics Profile Options page and return to the Service Logistics Task list.

11 Service Logistics Parts Search Program

Configure Parts Search

To use automatic and interactive parts sourcing, you must configure the parts search program parameters and the interactive Parts Search page.

Configure the Parts Search Program and Parts Search Page: Service Logistics provides two lookups that will let you configure how the parts search program is executed.

1. Navigate to the Service Logistics Lookups page and query:
 - **ORA_RCL_PART_SOURCING_CS:** Configure parts search for customer support (service request parts sales and parts exchange)
 - **ORA_RCL_PART_SOURCING_FS:** Configure parts search for field service
2. Use the following information to configure the lookups:
 - **Lookup Code:** Identifies the stocking location type or source type. Note that **Replenish** refers to inventory replenishment rules.
 - **Display Sequence:** Determines the sequence or order in which the search is executed
 - **Enabled :** Select which sourcing options will be used in automatic search as well as in the interactive Parts Search UI

Here's some additional information about the various search or sourcing options work.

Sourcing options available only for field service work orders:

Sourcing Option	Details
Technician	<ul style="list-style-type: none"> Part is sourced from the technician's trunk stock subinventories that can supply the ship-to address zone (set up in the Manage Transit Times page). When you choose to source from a technician's trunk stock subinventory, no part order or reservation is created as the part is available with the field service technician.
Site Dedicated	<ul style="list-style-type: none"> Part is sourced from the site-dedicated stocking locations (subinventories) associated with the customer ship-to address in the Service Logistics Manage Stocking Locations page. No parts order or reservation is created as the part is assumed to be available at or near the customer site.
Unmanned	<ul style="list-style-type: none"> Part is sourced from unmanned warehouses that can supply to the ship-to address zone as set up in the Manage Transit Times page. No parts order or reservation is created as the field service technician needs to pick up the parts. It's required that you define a ship method in the Manage Transit Times page but it's not used in this case.
Inventory Source	<ul style="list-style-type: none"> Search program uses inventory replenishment rules to find stocking locations that can resupply a field stocking location which is usually the technician's trunk stock. The inventory sources can be defined for combinations of inventory organization, subinventory, and item.

Sourcing Option	Details
	<ul style="list-style-type: none">If you select this sourcing option, a transfer order is created without a ship method or arrival date and time as inventory sourcing rules don't include ship methods.

Sourcing options available for service requests and field service work orders:

Sourcing Option	Details
Manned	<ul style="list-style-type: none">Part is sourced from manned warehouses that can supply to the ship-to address zone (set up in the Manage Transit Times page). The search program calculates the Arrival date and time for each ship method based on the transit times defined in the Manage Transit Time page and then filters out the ship methods that can't meet the need-by date.If you're sourcing for a work order, a transfer order is created to ship the parts to the technician subinventory. If you're sourcing for a service request, a sales order is created to ship the parts directly to the customer.
Global Order Promising	Select to use the GOP sourcing process.

12 Related Oracle Cloud Products

Overview

You must set up certain attributes in other Cloud applications so that Service Logistics users can order parts, create debriefs, and post charges.

Here's a list for your reference. The individual application setup is discussed in detail in the sections that follow.

Cloud Application	Configuration	Page
Fusion Service	<ol style="list-style-type: none"> 1. Service Request Parts Orders 2. Service Request Work Order Parts Orders 3. Service Work Order Charges and Estimates 4. Assign Privileges 	<ol style="list-style-type: none"> 1. Opt In: Service (Setup and Maintenance) 2. Opt In: Service (Setup and Maintenance) 3. Opt In: Service (Setup and Maintenance) 4. Security Console
Manufacturing and Supply Chain Materials Management	<ol style="list-style-type: none"> 1. Item Master Organizations 2. Inventory Organizations 3. Maintenance Organizations 4. Default Inventory Organization 5. Interorganization Parameters 6. Subinventories 7. Stocking Locations 8. Locators 9. Geographies 10. Zones 11. Internal Locations 12. Carriers 13. Transit Times 14. Inventory Replenishment Rules 15. Shipping Parameters 	<ol style="list-style-type: none"> 1. Manage Inventory Organizations 2. Manage Inventory Organizations 3. Manage Inventory Organizations 4. Manage Service Logistics Profile Options 5. Manage Interorganization Parameters 6. Manage Subinventories 7. Manage Stocking Locations 8. Create Subinventories, Manage Items and Manage Inventory Organization Parameters 9. Manage Geographies 10. Manage Zone Types 11. Manage Locations, Manage Subinventories, Manage Inventory Organizations 12. Manage Carriers 13. Manage Transit Times 14. Manage Subinventories, Manage Item Subinventories, Manage Items, Manage Inventory Organizations 15. Manage Shipping Parameters
Product Master Data Management	<ol style="list-style-type: none"> 1. Service Items: Labor, Expense, and Parts 2. Unit of Measure 3. Item Configuration 	<ol style="list-style-type: none"> 1. Manage Items 2. Manage Units of Measure 3. Manage Items
Maintenance Management	<ol style="list-style-type: none"> 1. Unit of Measure for Maintenance 2. Maintenance Organization 3. Maintenance Organization Parameters 4. Maintenance Organization Relationships 5. Resources 6. Work Areas 7. Work Centers 8. Maintenance Assets 	<ol style="list-style-type: none"> 1. Manage Units of Measure 2. Manage Organization Parameters 3. Manage Plant Parameters 4. Manage Maintenance Organization Relationships 5. Manage Maintenance Resources 6. Manage Maintenance Work Areas 7. Manage Maintenance Work Centers

Cloud Application	Configuration	Page
		8. Manage Assets
Pricing Administration	<ol style="list-style-type: none"> 1. Unit of Measure for Pricing 2. Customer Pricing Profile 3. Pricing Segment 4. Pricing Strategy 5. Price Lists (Labor, Expense, and Part Items Pricing) 6. Pricing Strategy Assignments 	<ol style="list-style-type: none"> 1. Manage Units of Measure 2. Manage Customer Pricing Profiles 3. Manage Pricing Segments 4. Manage Pricing Strategies 5. Manage Price Lists 6. Manage Pricing Strategy Assignments
Subscription Management	<ol style="list-style-type: none"> 1. Service Contract Adjustments 2. Assets Coverage 	<ol style="list-style-type: none"> 1. Manage Standard Coverage 2. Subscription Coverage Level
Global Order Promising	<ol style="list-style-type: none"> 1. ATP Rules 2. Sourcing Rules 	<ol style="list-style-type: none"> 1. Manage ATP Rules 2. Manage Sourcing Rules
Order Management	<ol style="list-style-type: none"> 1. Order Line Types 2. Orchestration Processes 3. Process Assignment Rules 4. Pretransformation Rules 	<ol style="list-style-type: none"> 1. Manage Order Lookups 2. Manage Orchestration Process Definitions 3. Manage Orchestration Process Assignment Rules 4. Manage Pretransformation Defaulting Rules

Note: The setups related to parts search are covered in Chapter 10.

Fusion Service

Use Fusion Service to access Service Logistics pages to order parts for service requests and service work orders.

You can access the Manage Charges and Estimates page from the Fusion Service Work Order page in order to create estimates, review and create charges, and post charges.

The following integrations are available between Fusion Service and Service Logistics:

- Service Request Parts Order
- Service Request Work Order Parts Order
- Service Work Order Charges and Estimates

You must select an installed base asset to post service charges and you can optionally select an asset when creating part exchange and depot repair part requirements. You can opt in and use the Fusion Service Installed Base Asset feature on your service requests and work orders. This allows you to capture the installed base asset in either the service request or the work order.

- If you enter the installed base asset in your service request it defaults to the Add Part page.
- If you enter the installed base asset in your work order it defaults to the Manage Charges and Estimates page.

Review the following setups.

1. To open the Service Logistics UI from Fusion Service, you must opt in to the following:

- a. Log in as a setup user and navigate to Setup and Maintenance.
- b. Select **Service** as functional area from the **Setup** drop-down list, and click **Change Feature Opt In**.
- c. Click the **Features** (pencil icon) for Service. Click the **Enable** icon (pencil icon) for **Service Logistics Parts Order**.

Select **Service Request Parts Order**, **Service Request Work Order Parts Order**, and **Service Work Order Charges and Estimates**. Save and close.

2. To order parts in Fusion Service, you must have the Manage Part Orders SVC_MANAGE_PART_ORDERS_PRIV privilege or the Parts region will be read-only in both the Service Request and Work Order pages.
3. To see the **Charges** button on the Fusion Service Work Order UI, which opens the Manage Charges and Estimates page, you must have the Manage Work Order Debrief and Estimates SVC_MANAGE_WORK_ORDER_DEBRIEF_AND_ESTIMATES_PRIV privilege.
4. To see the **Post Charges** button on the Manage Charges and Estimates page, which you access from the Fusion Service Work Order page, you must have the Post Charges for Service Logistics SVC_POST_CHARGES_PRIV privilege or the Post Charges with Rule Check for Service Logistics SVC_POST_CHARGES_RULE_CHECK_PRIV privilege. Without one of these privileges, you will only see the **Complete Debrief** button.

For more information about opting in to installed base assets, see the Implementing Fusion Service guide.

Manufacturing and Supply Chain Materials Management

You must complete setups in Manufacturing and Supply Chain Materials Management, including organizations and subinventories for reverse logistics and your repair and parts supply chain.

The reverse logistics and parts supply chains include geographies, zones, locations, carriers, transit times, shipping networks and replenishment rules.

Use the following guidelines to set up your master organizations, inventory organizations, maintenance organizations, default inventory organization, interorganization parameters, subinventories, stocking locations, locators, geographies, zones, internal locations, carriers, transit times, inventory replenishment rules, and shipping parameters for reverse logistics and your repair and parts supply chain.

1. **Item Master Organizations:** Use the Manage Inventory Organizations page to set up master and reference organizations so that you can define part and product item numbers and attributes, such as UOM, weight and so on.
2. **Inventory Organizations:** Use the Manage Inventory Organizations page to create inventory organizations for the warehouses and stocking locations in your parts and reverse logistics supply chains. You'll typically set up an inventory organization for each physical stocking location including warehouses, storage lockers, field offices as well as returns warehouses and repair depots. You'll also need to set up inventory organizations for your field service technician trunk stocks locations, typically by region or district, for example, Los Angeles Tech Trunk Stock.
3. **Maintenance Organizations:** Use the Manage Inventory Organizations page to create maintenance organizations for each repair depot and for capturing field service costs. Select the Organization Performs Maintenance Activities check box. The field service cost organization is captured on the Manage Charges and Estimates page.
4. **Default Inventory Organization Profile (INV_DEFAULT_ORG_ID):** Use the Manage Service Logistics Profile Options page to define this profile, which defaults and filters the Item LOVs. You'll typically set this option to an item master organization but you can set it to other organizations to restrict a user's access to certain items.

5. **Interorganization Parameters:** Use the Manage Interorganization Parameters page to enable parts and products to be shipped between the inventory organizations in your parts and reverse logistics supply chains. You must set it up for any organization that will ship material to a parts supply chain organization as well as the organizations that will receive parts from the field service organization for return or repair.
6. **Subinventories:** Use the Manage Subinventories page to create subinventories for your parts and reverse logistics supply chain inventory organizations. These subinventories must also get set up in the Service Logistics Manage Stocking Locations page where they get classified as usable and defective, manned, unmanned, site-dedicated, or technician. You'll typically create at least one usable and one defective subinventory in each inventory organization. You must also set up a usable and defective subinventory for each field technician trunk stock.
7. **Intersubinventory Parameters:** Use the Manage Intersubinventory Parameters page to create transfer orders from subinventories. You must define the organization, the destination type, the destination subinventory, the source subinventory, and the inventory destination transfer type. For the inventory destination transfer type, use the direct type if you want the transfer order to be automatically received into the field technician subinventory or use the transit inventory destination transfer type if you want the technician to receive the transfer order and complete the debrief process.
8. **Stocking Locations:** Use the Manage Stocking Locations page to add stocking locations (subinventories) to the parts supply chain by assigning the stocking location type (technician, site-dedicated, manned, and unmanned) and condition (usable or defective) to the parts and reverse logistics supply chains.
9. **Locators:** Use the Create Subinventories, Manage Items and Manage Inventory Organization Parameters pages to set up locators for items and subinventories if you have a stocking location that requires locator-level inventory tracking. Service Logistics supports locator-level inventory tracking and transactions including parts debrief, transfers and returns.
10. **Geographies:** Use the Manage Geographies page to set up geographies to define your shipping and returns zones. Complete the following steps:
 - a. After defining the geography hierarchy, specify the geography validations for the country. The geography hierarchy is your geography master, typically purchased from a third party provider. You must set up geography validation for those geography elements that you plan to use. For example, if you have set up zones by state, make sure that geography validation is set up for the State geography type.
 - b. After you set up all the components of your geographies (geography structure, geography hierarchy, and geography validation), run the Validate Geographies of Addresses Against Master Geographies ESS job with the values:
 - Location Table Name = HZ_LOCATIONS
 - Run Type = ALL
 - Usage Code = GEOGRAPHY

This ESS job creates a mapping between the addresses and the geography hierarchy or master. This mapping is used by the parts search program to find the geographies and hence the zones, where the ship-to address resides.
11. **Zones:** Use the Manage Shipping Zones page to set up zones for parts sourcing transit times and for return routing rules. Parts search, parts sourcing and return routing use the customer address to identify the zone.
12. **Internal Locations:** Use the Manage Locations page to create internal locations. You must set up internal locations and assign them to all the stocking locations (inventory organizations and subinventories) in your parts and reverse logistics supply chains. Internal locations are used when you're shipping and returning parts to a stocking location and when you're calculating arrival times while sourcing parts. Use the Manage Subinventories page to assign internal locations to subinventories. Use the Manage Inventory Organizations page to assign internal locations to inventory organizations.
13. **Carriers:** Use the Manage Carriers page to create carriers and their ship methods and then assign the ship methods to source inventory organizations for use.

14. **Transit Times:** Use the Manage Transit Times page to set up transit times by mapping origin internal locations to destination zones along with the available ship methods and their transit times (days).

The parts search program looks for parts at internal locations mapped to the ship-to address destination zones. Internal locations are internal addresses (HR_Location) assigned to inventory stocking locations (inventory organizations or subinventories). You must define which zones each of your manned, unmanned, and technician stocking location can supply.

Note: The Manage Transit Times page supports many other types of origins and destinations that aren't available in the parts search program.

For each source or origin location that can supply a destination zone, you must also set up at least one shipping method in the Shipping Methods section of the Manage Transit Times page. Transit times can be defined as a fraction of a day for shipping methods like courier and pickup that are time-based (less than a day).

15. **Inventory Replenishment Rules:** Use the Manage Subinventories page, Manage Item Subinventories page, Manage Items page, Manage Inventory Organizations page to set up inventory replenishment rules. In the Parts Search window, when you select the **Inventory Source** option, you are selecting the rules that identify the source inventory for your parts search. Inventory replenishment rules are used in automatic parts search. Inventory replenishment rules are also used to create transfer orders for field service parts when the required items are unavailable (backorders).
16. **Shipping Parameters:** Use the Manage Shipping Parameters page to determine whether a default shipping method is required to create a transfer order by selecting the **Enforce Shipping Method** check box. Shipping methods are defined when transit times are defined. We recommend that you don't select the **Enforce Shipping Method** check box. If you select it, you must set up transit times between all of your source and destination organizations in order to successfully create transfer orders.

For details on how to set up these attributes, refer to the Implementing Manufacturing and Supply Chain Materials Management guide.

Product Master Data Management

You must complete setups in Product Master Data Management for the items that you use for parts ordering and exchange, debrief, depot repair, and maintenance.

Note: You must properly configure substitute and supersession relationships between items in the Manage Item Relationships page of Product Information Management. This determines how the parts search program looks for substitutes and supersession parts when the original part isn't available. Specifically, when you select the **Alternates** check box in the Parts Search page.

1. Create all the service items: labor, parts, expense, and fixed charges.

Note: You must set up serviceable products/item numbers (products for which you can create an SR) in both the SCM item master and the CRM catalog.

2. Define the unit of measure (UOM) for the items that you create:

- Labor Items
 - **UOM Class:** Must set up with **UOM** from the **Time UOM Class**.
 - **UOM Name:** **Hours** or **Minutes** (only need to set up the **Primary UOM** as it's the only one used by Service Logistics).
 - Set up the **Hours UOM** profile (**ORA_RCS_HOUR_UOM**) for your labor items. You must use this value in the next step, where you define the conversion between this value and the labor item's primary UOM.
 - **UOM Conversion:** Set up **Primary UOM** to **Hours UOM (Hours UOM profile)**, for example, 60 Minutes = 1 Hour or 1 Hour = 1 Hour.
- Expense Items
 - **UOM Class:** You must set up with UOMs from the **Currency UOM Class**.
 - **UOM Name:** You must set up expense items with UOMs for every currency that the field service technicians might report their expenses, for example **USD, CAD, EUR**.
 - **UOM Conversion:** Not needed
- Part Items
 - **UOM Class:** You must set this up with a UOM from the **Quantity UOM Class**.
 - **UOM Name:** Examples include **Each, Meters, Gallons**.
 - **UOM Conversion:** If required
- Fixed Charge Items
 - **UOM Class:** Any
 - **UOM Name:** You should set up fixed charges with **UOM Each** or with a **Currency UOM**.
 - **UOM Conversion:** Not applicable

3. Configure item attributes for specific business needs according to the following details:

Item configuration for parts ordering: Use this list to assign item attributes to all the service items and consumables used for part requirement.

- Items used in SR Parts Tab: Return SAC
 - a. **Stock enabled: Yes**
 - b. **Transactions enabled: Yes**
 - c. **Returnable: Yes**
 - d. **Item Organization: Default Inventory Org Profile (INV_DEFAULT_ORG_ID)**
 - e. **Material billable: M**
- Items used in SR Parts Tab: Shipment SAC
 - a. **Stock enabled: Yes**
 - b. **Transactions enabled: Yes**
 - c. **Customer Orderable: Yes**
 - d. **Item Organization: Default Inventory Org Profile (INV_DEFAULT_ORG_ID)**
 - e. **Material billable: M**
- Items used in WO Parts Region or Tab
 - a. **Stock enabled: Yes**
 - b. **Transactions enabled: Yes**

- c. **Internal Orderable: Yes**
- d. **Item Organization** must match the **Destination Org**, or else it must match the **Default Inventory Org Profile (INV_DEFAULT_ORG_ID)**.
- e. **Material billable: M**

Item Configuration for Debrief and Charge Items: Items must have the following attributes for use in debrief.

- Part Items
 - a. Map the item billing type to the billing category of **Material**.
 - b. You must assign the item to the same organization as the selected subinventory.
 - c. For project enabled organizations, you must enable the **Allow Use of Common Supply** attribute for the item.

This provides the option to issue the item from the common inventory when you create a debrief transaction for the part, rather than the project-specific inventory.
- Labor Items
 - a. Map the item to the service activity code to the billing category of **Labor**.
 - b. Associate the item to the inventory organization from the technician's default subinventory.
- Expense Items
 - a. Map the item to the service activity code to the billing category of **Expense**.
 - b. Associate the item to the inventory organization from the technician's default subinventory.
- Fixed Charge Items
 - a. **Stock enabled: No**
 - b. **Transaction enabled: No**
 - c. **Reservable: No**
 - d. **Inventory Item: No**
 - e. **Shippable: No**
 - f. **Customer Ordered: Yes**
 - g. **Customer Orders Enabled: Yes**
 - h. **Invoiced: Yes**
 - i. **Invoice Enabled: Yes**
 - j. **Billing Type:** User-defined billing type that you associate with the Service Logistics **Fixed Charge** billing category.

Asset item configuration for maintenance work orders: Create maintenance work orders to perform depot repair. Also create maintenance work orders when you post field service charges. You must have an asset to create these maintenance work orders.

- Field service: While you can add the asset to the service request or service work order, you must capture the asset on the debrief header.
- Depot repair: While you can add the asset in the service request and Add Part Requirements pages, you must capture the asset when you create the repair work order (Maintenance Work Order).

The items associated to these assets must have the following:

- Select the following two parameters for the item in the Asset region in the Specifications tab:
 - a. **Enable Asset Tracking: Full Lifecycle**

b. Enable Asset Maintenance: Yes

- Configure the attribute for serial number generation:

a. Generation: Dynamic entry at inventory receipt

Item configuration for Service BOM filter: When you create part requirements for service requests and service work orders (Fusion Service), you can filter the **Item** list of values (LOV) with only the valid parts for the product that you're servicing (SR Product Item). Specifically, this setup enables the BOM filter on the **Item** LOV in the Fusion Service Parts pages. To use this filter, you first must set up an item structure to use as the Service BOM in order to define the valid parts. To do this:

1. First create the item structure name or type in the Manage Item Structure Type Details page. To access this page, click **Setup and Maintenance**, then in the **Product Management** offering, select **Structures**, and then select **Manage Item Structure Type Details**.
2. After you create the **Item Structure** name, go to Service Logistics, then navigate to the Manage Service Logistics Profile Options page. Click on the profile option **ORA_RCL_ITEM_STRUCTURE** and add the item structure name.
3. In Product Information Cloud, go to the Manage Items page and query the item for which you want to create an item structure.
4. Click on the item to go to the Edit Item page.
5. Click on the **Structures** tab.
6. Click on the **Actions** drop-down list and then click **Create**.
7. See the Create New Item Structure page. Here you select the item structure name that you have created for Service Logistics and add the required information.
8. Define your service BOM for this item by adding the applicable items to the item structure.

Item relationship configuration for alternate parts: When you search for alternate parts in the Part Search page, the parts search program uses the superseded and substitute relationships that you define in the Manage Item Relationships page.

To access, click **Product Information Management**, then in **Item Management** select **Manage Items**. The Advanced Search page appears where you can query an item and open the Edit Item page.

1. Select the **Relationships** tab.
2. Select the **Create** icon in the **Related Items** tab.
3. In the **Create Related Item Relationship** page, select an item to use as the superseded or substitute part in the **To Item** field.
4. Select **Superseded** or **Substitute** in the **Type** list of values.
5. Select the **Reciprocal** check box if the item relationship is reciprocal.
6. Click **OK** to return to the Edit Items page.
7. Confirm that the item appears in the **Related Items** table.
8. **Save**.

For more information, refer to the Implementing Product Management guide.

Related Topics

- [Manage Item Relationships](#)

Maintenance Management

Service Logistics and Maintenance have three integrations, one for field service and two for depot repair.

- **Field Service:** When you post Field Service charges, you create a maintenance work order (MWO) to update Inventory, Asset Tracking, and Costing (or you update the MWO in the Preventive Maintenance flow).
- **Depot Repair:** Service Logistics and Maintenance have a couple of integrations in the Depot Repair process. MWOs used to process the repair are created in the Service Logistics Manage Depot Repair page. Service charges are created from these MWOs in the Charges tab of the Depot Repair Workbench page.

Field Service

The following setups are required to create the MWOs when you post field service charges. These setups are organized by the order these fields appear on the Manage Charges and Estimates page.

Field Service Setups

Field	Setup Steps
Asset	<p>This is a required field on the Debrief and Charges headers. You must select the Allow Work Orders check box and the Maintenance Asset check box in the Manage Assets page in order to enter an asset.</p> <p>Also, the asset's operating organization must be the same as the cost organization or you must relate it to the cost organization on the Debrief and Charges header. You can do this in the Maintenance Organization Relationships page.</p> <p>Although the asset isn't required for the UI or API, it's required to create the MWO. As such, you can identify an asset in the Fallback Asset profile that's be used to create the MWO. This fallback asset has the same setup requirements as a selected or debriefed asset.</p>
Asset Item	<p>In order for the item on the asset to be valid for the cost organization, you must define the following in the Manage Items page:</p> <ul style="list-style-type: none"> • Allow Maintenance Asset: Yes • Enable Asset Tracking: Full Lifecycle Tracking
Cost Organization	<p>The organization that's used to create the MWO is included on the Manage Charges and Estimates page and API, and it defaults from the asset. This organization must be maintenance-enabled, which you can do by selecting the Organization Performs Maintenance Activities check box in Manage Inventory Organizations page. It also needs to be the same as the asset's operating organization or related to it in the Manage Maintenance Organization Relationships page.</p> <p>You must also set up the following Plant parameters for the cost organizations in the Manage Plant Parameters page:</p> <ul style="list-style-type: none"> • Manufacturing Calendar • Default Supply Subinventory • Default Completion Subinventory
Cost Subtype	<p>This is a required field that defaults from the asset that you select. The work order subtypes are set up in the Maintenance Lookup ORA_MNT_WO_SUB_TYPE.</p>

Field	Setup Steps
Work Area	You must create one work area for each cost organization in the Manage Maintenance Work Areas page.
Work Center	Create only one work center for the cost organization and associate it to the work area in the Manage Maintenance Work Centers page.
Debrief Items	See the Product Master Data Management section. For each cost organization, you must map your labor and expense items to the MWO resources in the Manage Resource to Item Mapping page. These resources are used to create the MWO resource transactions to record these costs. You must also set up labor items with a primary UOM.
Resources	The labor and expense resources that you map to the debrief items must be set up in the cost organization in the Manage Resources page, and you must map them to the cost organization's work center in the Manage Work Centers page. These labor resources must have a UOM that equals the UOM in the Hour Unit of Measure profile option, ORA_RCS_HOUR_UOM, in the Manage Plant Profiles page.
Service Activity Codes (SACs)	In the Manage Service Activities page, you must map the Field Service Labor and Expenses SACs to the resource activities that will be used to create the MWO resource transactions. You set up resource activities in the ORA_WIS_RESOURCE_ACTIVITY lookup table.

Depot Repair

The following setups are required to create service charges for the parts, labor and expenses incurred to repair the product in the repair depot MWO and to create MWOs to execute depot repair for a customer RMA.

Depot Repair Setups

Fields	Setup Steps
Resources	You must map the resources used to create labor and expense transactions in the MWO pages to items so that you can create service charges. You can create service charges by selecting the Create Charges button in the Depot Repair Workbench page. You must create these mappings for each repair organization in the Manage Resource to Item Mapping page. You must confirm that the resource UOMs are the same as, or can be converted to, the item's UOM.
Resource Activities	You must map the resource activities used to create labor and expense transactions in the MWO pages to the Service Activity Codes, so you can create service charges. You can create service charges by selecting the Create Charges button in the Depot Repair Workbench page. You can create these mappings in the Manage Service Activities page. Set up the resource activities in the ORA_WIS_RESOURCE_ACTIVITY lookup table.
Asset	You must select an asset to create a depot repair MWO in the Create Repair Order page. This asset must have the following check boxes selected in the Manage Assets page, <ul style="list-style-type: none"> Allow Work Orders Maintenance Asset

Fields	Setup Steps
	Also, the asset's operating organization must be the same or related to the repair maintenance work order organization in the Maintenance Organization Relationships page.
Asset Item	In order for the item on the asset to be valid for the MWO and cost organization, you must define the following in the Manage Items page: <ul style="list-style-type: none"> Allow Maintenance Asset: Yes Enable Asset Tracking: Full Lifecycle Tracking
Debrief Items	See Resources item previously mentioned in the table. See the Product Master Data Management section

Pricing Administration

Service Logistics uses Pricing when calculating service charges for parts orders as well as field service and depot repair debrief transactions. Required attributes for Pricing include the following:

1. Unit of Measure for Pricing: You must set up the predefined profile (Hour: Unit of Measure, UOM Code: User-defined, for example, HR), so that Service Logistics can calculate labor time in the labor item's Primary UOM.
2. Customer Pricing Profiles: Assign pricing profiles to customer parties in the Manage Customer Pricing Profiles page.
3. Pricing Segment: Define pricing segments in the Manage Pricing Segments page. Include conditions that match the customer profiles.
4. Pricing Strategy: Create a pricing strategy in the Manage Pricing Strategies page. Here you select the default currency and the conversion type. You also assign the Price Lists and Currency Conversion Lists to your pricing strategy. .
5. Price Lists (Labor, Expense, and Parts Items Pricing): Create price lists (Manage Price Lists page) to set the price of the ordered or returned part. Use the following information:
 - o Select the currency in the header region of the price list
 - o Price List Type: **Segment Price List**
 - o Price List Lines:
 - Select the item, the UOM, and the line type. The item validates against the business unit's item validation organization, which is set up in the Manage Pricing Parameters page.
 - Note that the price of all items used in Service Logistics must be set up under Line Type **Buy**.
 - For parts and fixed charge items: Create a price list line for every UOM that you can debrief. Note that you must set up the prices for every debrief UOM but not every billing currency.
 - For expense items: Create a price list for every debrief UOM or currency (payment currency). Expense items use the **UOM** currency type. On the Expense tab, it's **Currency**. On the Charges tab and in Price List pages, it's **UOM**. In the price list, create one price list line for each expense item with pricing UOM: currency of the price list. Price will usually be 1 unit of the Price List Currency (for example, \$1).
 - For labor items: Create a price line for the labor item's primary UOM
 - o Charge Lines:

- For each price line, there can be multiple charge lines.
 - Base Price (Expense price) should always be **1**.
 - Allow manual adjustments.
6. Pricing Strategy Assignments: Assign Pricing Strategy to Customer Pricing Segments in the Manage Pricing Strategy Assignments page. Note:
- o Use Header (Assignment Level) + Sales (Pricing Context) + Service Order (Transaction Type) as your Pricing Strategy Assignment Rule
 - o Remember that Pricing Segment + Conditions = Pricing Strategy

Extending the Pricing Component Description

Use the service mapping functionality in Pricing to include additional pricing information such as the subscription number in the pricing components description. In Service Logistics, pricing components appear in the Amount dialog box. You can open this from the part requirements table, Manage Charges and Estimates page, and the Depot Repair Workbench. To add the subscription number to the pricing components, do the following steps:

1. Open Pricing Administration.
2. In the Tasks panel, choose **Manage Service Mappings**.
3. Click on **Sales** as Service Logistics uses the sales context.
4. Add subscription number to the **PricingTerm** entity. To do this, select the entity, and then click on the **Add(+)** button. In the PricingTerm:Details window, add the attribute **SubscriptionNo_Custom**.
5. Then, click **Services** and add this attribute to the service **priceSalesTransaction** and entity **PricingTerm**.
6. Define sources for the attribute. To do this, click **Sources**. Define the following Service Logistics sources: **ServiceOrderLine**, **View Object PricingTerm** and **SubscriptionNumber**.
7. Use the custom attribute **SubscriptionNumber_Custom** in the algorithm (service) **PriceSalesTransaction** (for the Populate Charge Component Explanation algorithm).

For more information, refer to the Administering Pricing guide.

Subscription Management

If you want to provide discounts to customers, you must set them up in Subscription Management. These discounts are applied during the calculation of service charges to arrive at the final prices that will be invoiced. Here's how:

- The Calculate Service charges program in Service Logistics retrieves all applicable adjustments for the customer and asset from Subscription Management. When pricing parts sales and exchanges, the customer and asset from the associated SR are used to get the adjustments. When pricing field service and depot repair charges, the customer and asset from the debrief header are used to get the adjustment.
- The discount pricing terms returned for all active contracts are then passed to the Pricing web service.
- Pricing then returns all of the prices and charges after including the contract discounts. This discounted price is then visible in the Manage Charges and Estimates page in Service Logistics. If more than one adjustment applies to the service charge, they will be all be applied to the list price to get the final charge amount.

How to set it up?

1. Create Standard Coverage templates: You can create multiple standard coverage templates for the different service levels that you want to provide to a customer. This is set up in the Manage Standard Coverage page of the Entitlements Management section in the Subscription Configuration work area. For information, refer to the chapter Configure Subscriptions in the Implementing Oracle Subscription guide.

2. Add adjustments: Edit the standard coverage template that you have created. Go to **Adjustments**. Here you will set up the entitlements available for the customer for the different service activities and billing types, such as labor, expense, and parts. Select **Discount** as your **Adjustment Type**.
3. Create a subscription for your customer.
4. Add a coverage product to the subscription.
5. Assign the standard coverage that you have created to the coverage product.
6. Add both parent and component assets to the Subscription coverage.

Note: Include coverage for all assets: When service charges are calculated, Service Logistics uses the asset in the debrief header or in the part requirement to get the applicable subscription coverage adjustments (discounts). These assets must be listed in the Subscription Coverage Level page.

Global Order Promising

Service Logistics parts search offers Global Order Promising (GOP) as one its parts search options. However, we recommend using the other parts search features, as GOP isn't a great fit for service parts sourcing.

You must complete the following setups for Global Order Promising:

1. ATP Rules to configure various parameters including select supply and demand types. ATP Rules must be assigned to item, organization, or item organization.
2. Sourcing Rules: Define Sourcing Rules to set up source, sourcing type, and other attributes. You must:
 - a. Create Local Sourcing Rule for Transfer Order (Work Order Parts Order)
 - b. Create Global Sourcing Rule for Sales Order (SR Parts Order)
 - c. Assigning Sourcing Rules to Assignment Sets

For more information, refer to the Using Order Promising guide.

The Global Order Promising setup also depends on the following parameters being defined:

- Shipping method.
- Transit time from source to destination.
- Carriers.

For information, refer to the Implementing Common Features for Supply Chain Management guide.

Order Management

Service Logistics integrates with Order Management to ship and return products and parts as well as bill for field service and depot repair.

What do you need to set up in Order Management for sales order fulfillment in Service Logistics?

- **Order Types:** (Optional) Set up order types and add them to your service activity codes (SACs) so that when you create your sales order headers they have an order type.
- **Order Line Types:** Use order line types to control the processing and accounting of sales order lines. Order line types typically drive the assignment of DOO orchestration processes to sales order lines. The order line types

that are mapped to the Service Logistics SACs in the Service Logistics Setup page appear on the sales orders lines created by Service Logistics. Sales order headers are created with the order type associated to the SAC that's used to create the first sales order line. You can use predefined order line types but we recommend that you create new ones for Service Logistics flows.

- a. Predefined order line types:
 - Buy (ORA_BUY)
 - Return for credit and return the item (ORA_RETURN)
 - Return for credit (ORA_CREDIT_ONLY)
 - Cancel the item (ORA_CANCEL)
- b. Order line types are stored in the following Order Management lookups:
 - For shipment lines: ORA_DOO_LINE_TYPES
 - For return lines: ORA_DOO_RETURN_LINE_TYPES
- **Orchestration Processes:** Order Management uses DOO orchestration processes to run sales orders lines for shipments, returns, and billing. You can reuse predefined OM orchestration processes, but in most cases, you must define custom orchestration processes. Perform these setups in the Manage Orchestration Process Definitions page. You can copy the following predefined orchestration processes to help you create custom orchestration processes:
 - DOO_OrderFulfillmentGenericProcess
 - DOO_BillOnlyGenericProcess
 - ReturnOrderGenericProcess
 - ShipOrderGenericProcess

To enable a custom orchestration process, you must release it and deploy it using the Action Menu on the Edit Orchestration Process Definition page.

- **Process Assignment Rules:** Use process assignment rules to assign the correct orchestration process to the sales order line. You must define them so that no sales order line satisfies more than one rule at a given time. They are typically based on the Order Line Type but you can include other criteria.
- **Pretransformation Rules:** Pretransformation rules run when you create an order. You can use them to add required and optional data to the sales order.
- **Collect Planning Data:** You must run the Collect Planning Data program for every inventory organization that you'll be using to create sales order shipment and return lines. If you don't, you'll get an error message when you try to create a sales order for part requirements.

Note: You must run the collections process when you create a new inventory organization.

- **Enable the Organizations for Source Systems**
 - i. From the Navigator, select **Manage Planning Source Systems** from the Tasks list.
 - ii. Select the relevant source system row in the Source Systems work area.
 - iii. Click the **Manage Organization List** button.
 - iv. In the Manage Organization List window, click the **Refresh Organization List** button.
 - v. Search for the organization using the search filters.
 - vi. Select the **Enable for Collections** check box for the organization you want to enable.
 - vii. Click **Save and Close**.
- **Run the Collect Planning Data Process**
 - i. From the Navigator, select **Collect Planning Data** from the Tasks list.

- ii. Select a source system in the **Source System** field.
 - iii. In the Reference Data tab, select **Organizations** in the **Reference Entities** column.
 - iv. Click the right arrow button to move the value to the **Selected Entities** column.
 - v. Select the **Supply Planning Data** tab.
 - vi. Select **On Hand** in the **Supply Entities** column.
 - vii. Click the right arrow button to move the values to the **Selected Entities** column.
 - viii. Click the **Select Collection Filters** button.
 - ix. In the Select Collection Filters window, click the **Plus** icon for the **Organizations Filter for Transaction Data** field. The Select Organizations Filter for Transaction Data window appears.
 - x. Select the **Include** check box for the organization you want to include.
 - xi. Click **OK**.
 - xii. In the Select Collection Filters window, click **OK** to return to the Collection Planning Data window.
 - xiii. Verify that the value in the Collection Type drop-down list is **Net change**.
 - xiv. Click **Submit**.
- **Parts Only Sales Order Setup:** You can create sales orders for parts sales, returns, and exchanges in the Service Request Parts tab, or in the Create or Manage Part Requirements page using service activity codes tied to the Customer Support or Parts Exchange business processes.
 - a. **Order Line Types:** Set up order line types (or use predefined order line types) and assign them to each of your Customer Support and Parts Exchange SACs. Some of the predefined order line types that you may want to use include Buy and Return for credit and return the item.
 - b. **Orchestration Processes:** Determine the DOO orchestration process for each of your business flows (Service Activities). You can use a predefined orchestration process but in most cases, you must create a new one.

For Parts Sales and Exchange Shipments, we recommend that you copy the predefined process ShipOrderGenericProcess and add the Asset Management step (Task, DOO_AssetManagement) after the shipment step. This ensures that you update the installed base/asset tracking when you ship the parts. You should also remove the schedule step as Service Logistics sources the required parts before creating the order.

For Parts Returns, we recommend you copy the predefined ReturnOrderGenericProces and add the Asset Management step (Task, DOO_AssetManagement) after the receiving step. This ensures the updating of the installed base/asset tracking when receiving the broken part into inventory.

- c. **Process Assignment Rule:** Define Process assignment rules to trigger the proper orchestration process for the sales order lines created from Service Logistics. You typically set up a rule to assign an orchestration process for each of your order line types. You can add other conditions besides the order line type if needed.
- d. **Pretransformation Rules:** Set up a pretransformation defaulting rule to get the payment terms for a sales order. For information, see chapter Business Rules in the Implementing Order Management guide. You must set up a pretransformation rule if you don't define payment terms on your customer accounts.

- **Bill Only Sales Order Setup:** You must set up bill only sales orders to create invoices for Field Service and Depot Repair.
 - a. **Order Line Types:** Create a new order line type (for example, Bill Only) as there is no predefined order line type to drive the processing of bill only sales order lines. Assign this new order line type to your Field Service and Depot Repair SACs.
 - b. **Orchestration Processes:** You can create a custom DOO process or use the predefined DOO_BillOnlyGenericProcess process that meets most requirements.
 - c. **Process Assignment Rule:** Create a new process assignment rule to assign your bill only process to your sales orders lines that contain your bill only order line type.
 - d. **Pretransformation Rules:** Set up the pretransformation defaulting rule to get the payment terms for the bill only sales order for debrief. You must set up a pretransformation rule if you don't define payment terms on your customer accounts.
- **Depot Repair Shipment Sales Order Setup:** Create sales orders to ship repaired (or replacement) parts back to customers. The depot repair shipment process is different from parts only shipments because the part to be shipped doesn't exist in inventory when creating the shipment sales order line.
 - a. **Order Line Types:** Create a new order line type (for example, DR Shipment) for depot repair shipment order lines. Assign this new order line type to the service activity codes you set up for depot repair shipments (Depot Repair Logistics business process) in Service Logistics.
 - b. **Orchestration Processes:** Create a custom orchestration process by copying the predefined process ShipOrderGenericProcess. Add the Asset Management step and remove the Schedule and Create Reservation steps. You must add the Asset Management step to update the installed base when shipping the repaired part back to the customer. You must remove the Schedule and Create Reservation steps so that Order Management doesn't try to source and reserve the repaired product when creating the order.
 - c. In addition to adding and removing orchestration steps from your custom process, you must add and remove order line and order fulfillment line statuses. You define statuses for your orchestration process on the Status Conditions tab where there are two sub-tabs that you must update (Orchestration Line Statuses and Fulfillment Line Statuses).
 - **Orchestration Line Statuses tab:** Add the statuses Asset Interface Completed and Not Applicable to support the Asset Management step. To do this, you must create a new Process Class with these new statuses and assign it to your custom orchestration process. This clears out all of the statuses copied from the predefined process. Then you must manually re-enter them, except for the statuses that you no longer need because you've removed their steps from the custom process (Scheduled, Reserved, Manual Scheduling Required, and Manual Reservation). Remember to add the new statuses.
 - **Fulfillment Line Statuses tab:** You also must add and remove statuses on the Fulfillment Line Statuses tab. This is easier as this page provides copy functionality so you don't have to re-enter all of the statuses from the predefined process.
 - d. **Process Assignment Rule:** Define assignment rules to trigger the proper orchestration process for the sales order lines created from Service Logistics. You typically set up a rule to assign an orchestration process for each of your order line types. You can add other conditions besides the order line type if needed.
- **Use Order Management Extensions to Populate Service Logistics Data to Sales Orders:** Use Order Management extensions to pull standard and flexfield data from the Service Logistics tables into Order

Management. You can do this by writing a Groovy script in Order Management extensions using the Service Logistics public view objects.

The following public view objects also include support for flexfields:

- oracle.apps.scm.serviceLogistics.parts.publicView.PartsReqHeadersPVO
- oracle.apps.scm.serviceLogistics.parts.publicView.PartsReqLinesPVO
- oracle.apps.scm.serviceLogistics.parts.publicView.PartsReqLineDetailsPVO
- oracle.apps.scm.serviceLogistics.billing.publicView.DebriefHeadersPVO
- oracle.apps.scm.serviceLogistics.billing.publicView.DebriefLinesPVO

Note:

- For information on defining and assigning orchestration processes, refer to the Implementing Order Management guide.
- For order fulfillment the bill-to-address and bill-to-account for customers must also be set up properly in TCA.

13 Depot Repair

What Do I Need to Set Up for Depot Repair?

To use the depot repair functionality in Service Logistics Cloud, you must ensure that your systems administrator has set up the following:

1. Set up an Inventory Organization for each repair depot. Depot repair organizations must be separate from the inventory organizations used to maintain internal assets. The inventory organization must also be enabled for maintenance activities.
2. Set up service activity codes (SAC) for depot repair using the following seeded business processes:
 - Depot Repair: Set up service activities for the labor and parts used during repair execution in Maintenance Cloud.
 - Depot Repair Logistics: Set up service activities to manage the depot repair return and shipment, that's when the customer asset is returned to the warehouse for repair and the repaired item is shipped back to the customer. Depot Repair Logistics SACs should be set up with a Zero Charge attribute as these lines are for the return and shipment of a customer-owned product or part.

Note: Refer to the Order Management section in Chapter 10 to set up a depot repair shipment sales order.

3. Add resource activities to your depot repair service activity codes. Service Logistics uses the resource activity captured in the work order resource transaction (for example, Depot Repair) to retrieve the required service activity code (for example, Depot_Labor_SAC). If you do not set up resource activities for depot repair, the labor service activity code is retrieved by default. In addition, no service charges will be created for non-labor work order resource transactions.
4. Set up Service Logistics profile options to define values for:
 - the default service activity for parts issued to the depot repair order
 - default service activity for parts recovered

These values are used when creating Service Logistics debrief and charges transactions after the technicians have created the debrief for the repair order in Maintenance Cloud.

5. Ensure that Return Routing Rules are created. If no Return Routing Rules are defined, a default return organization can be selected when a service request is created for the broken part.
6. Ensure that you have also set up:
 - Depot repair items (labor, parts, and expense) with Service Logistics billing types
 - Sales order line types (broken product RMA, ship repaired product, bill only)
 - Sales order DOO processes (broken product RMA, ship repaired product, bill only charges)
7. You can also set up work definitions to define the operations, resources (labor, tools) and parts required for the repair.
8. To include outside processing charges from the depot repair maintenance work order, set up the following:
 - Create a service activity code for outside processing against the Depot Repair business process.
 - Transaction category = Order
 - Order Line Type = Bill Only

- Create Order = Yes
- Enabled = Yes
- o For profile ORA_RCL_DEF_DEPOT_SAC_OSP, add this service activity as the default service activity code for the outside processing item delivered for repair work order.

When service charges are created from the maintenance work order, the outside processing item will show up in the Parts tab of the Depot Repair Workbench. The charges are created as material debrief charges and the price for the same can be viewed in the Charges tab.

In complex depot repair and return logistics environments, the customer asset may be transferred across several locations before it's returned to the customer, for example from a local warehouse to a distribution center and then to the repair depot. The repaired product may also need to be transferred from the repair depot back to the local warehouse before it's shipped back to the customer. To manage such a multi-location and complex depot repair process, it's important that you set up the depot repair and return supply chain properly in Oracle SCM cloud. Check that your organization, subinventories, interorganization parameters, and ship methods are defined to execute transfer orders between your source and destination organization. Shipping methods must be set up in the Manage Carriers page and assigned to your source inventory organizations.

14 Preventive Maintenance of Customer Assets

Set Up Field Service Preventive Maintenance

Organizations that maintain assets deployed at their customer locations need to perform preventive maintenance activities on those assets using field service functionality.

There are two ways to perform field service preventive maintenance: through an OFSC (Oracle Field Service Cloud) activity or through a Fusion Service generic work order. Service Logistics facilitates the integration between Maintenance, Fusion Service, and Field Service cloud applications. This enables field service administrators to oversee preventive maintenance work on customer-owned assets using the Service Logistics application.

- Preventive maintenance work orders for the installed base assets are created in the Oracle Maintenance Cloud application.
- A scheduled process is run in Service Logistics to generate Fusion Service SR (service request) and Service Work Orders with the maintenance work order details. These service requests and service work orders are then accessible in the Fusion Service UIs, Service Logistics UIs as well as the Field Service application.
- Field service technicians perform these work orders and create debrief using the Field Service application.
- Field service administrators edit and create part requirements, review debrief, finalize, and post charges for the work orders in Service Logistics.
- The maintenance work order is then updated to reflect the task completion.

The following steps must be completed in Maintenance Cloud to set up the preventive maintenance workflow.

1. **Set Up Customer Assets:** Create an Installed Base asset with customer association and set the customer address as the asset location. This address represents the location being serviced. Note that the installed base asset should be enabled for attributes required for preventive maintenance flow:
 - Allow maintenance programs
 - Allow work orders

Note: The Operating Organization of the asset needs to be a Maintenance Organization. This is required for the preventive maintenance flow for defining the setups and generating work orders using Maintenance Cloud.

2. **Define Maintenance Programs:** A maintenance program consists of multiple work requirements. Based on the maintenance programs, a maintenance forecast is generated which is then used to automatically create maintenance work orders. Maintenance programs must have the following details:
 - Asset or item covered by the program
 - Preventive maintenance forecast details and scheduling pattern
 - Work definition consisting of the materials required
3. **Generate Maintenance Forecast:** Run the Generate Maintenance Forecast process from the Generate Maintenance Forecast page or through the **Actions** drop-down button on the Maintenance Program page. Note that you can run the scheduled process on demand or schedule it to run at a specific time interval.

4. Create Preventive Maintenance Work Orders: Run the Create Work Orders scheduled process to create the maintenance work orders based on the forecast. This can be done either on the Generate Maintenance Work Orders page or through the **Actions** drop-down button on the Maintenance Program page. The work order is initially created with the status as Unreleased. The status must be updated to Released so that it can be integrated with Fusion Service.
5. Rather than using the Create Preventive Maintenance Work Orders program, you can use the Oracle Integration Cloud Service Logistics Preventive Maintenance scheduled process. You can configure this integration process to retrieve additional details from Maintenance Cloud and provide these details to Fusion Service, for example, the work order area to use based on an asset's time zone.

For information, see chapter Maintenance Programs in the Using Maintenance guide.

Related Topics

- [Create Service Work Orders for Preventive Maintenance](#)

15 Integration With Oracle Projects

Setting Up Integration With Oracle Projects

Service Logistics users have the option of integrating with Oracle Projects so that project details can be associated with service work orders, third-party work orders, and depot repair work orders.

When a work order is associated with a project, the charges from the work order debrief lines are posted to Oracle Projects and processed as project expenditure.

To set up the integration with Oracle Projects:

1. In the Setup and Maintenance work area, opt in for the Project-Driven Supply Chain feature:
 - Navigation: **Setup and Maintenance, Manufacturing and Supply Chain Materials Management Setup, Change Feature Opt In**
 - Functional Area: Manufacturing and Supply Chain Materials Management
 - Feature: Project-Driven Supply Chain
2. Choose the **Enable inventory tracking by project** parameter for the desired inventory organization or plant:
 - Under **the Setup and Maintenance work area**, select the **Manage Inventory Organizations** task:
 - Offering: Manufacturing and Supply Chain Materials Management
 - Functional Area: Facilities
 - Task: Manage Inventory Organizations
 - Query the inventory organization.
 - Click **Manage Organization Parameters**.
 - Select the check box **Enable inventory tracking by project**.
3. Classify the inventory organizations or plants enabled for inventory tracking as Project Expenditure Organizations and also include them in the project hierarchy in the Oracle Project Portfolio Management Cloud application.
4. If project-specific debrief or depot repair maintenance costs will be sent to Oracle Project Financials, then you must classify the inventory organizations that are enabled for inventory tracking as Project Expenditure Organizations in Project Portfolio Management.
5. If project-specific debrief or depot repair maintenance costs aren't to be sent to Oracle Project Financials, then you should set up project types in Project Portfolio Management for exclusion from cost collections in Supply Chain Management.

16 Descriptive Flexfields

Set Up Additional Information Using Descriptive Flexfields

Set up descriptive flexfields to add custom attributes to various entities in your Service Logistics application and define validation for them.

You can use these custom fields to capture additional information specific to your business. Service Logistics provides the following seeded flexfields:

Name	Flexfield Code	Description
Part Requirement Header Attributes	RCL_PARTS_REQ_HEADERS_DFF	Add custom fields to the part requirement header region: Create Part Requirements page.
Part Requirement Line Attributes	RCL_PARTS_REQ_LINES_DFF	Add custom fields to the part requirement lines region: Edit Part/Add Part dialog box.
Debrief Header Attributes	RCL_DEBRIEF_HEADER_DFF	Add custom fields to the debrief header region: Manage Charges and Estimates page.
Debrief Line Attributes	RCL_DEBRIEF_LINE_DFF	Add custom fields to the debrief lines region: Add Labor Details, Edit Labor Details, Add Part Details, Edit Part Details, Add Expense Details, Edit Expense Details, and the Estimate lines, Add Fixed Charges, Edit Fixed Charges.

To set up descriptive flexfields:

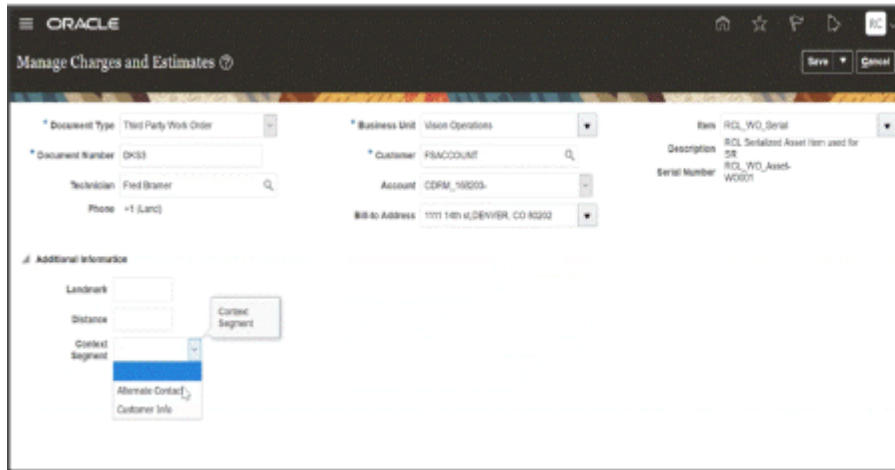
1. Go to the Setup and Maintenance work area.
2. Click on the Tasks panel tab and then click Search.
3. In the Search page, query Manage Descriptive Flexfields.
4. From your search results, click the Manage Descriptive Flexfields link.
5. In the Manage Descriptive Flexfields page, type **RCL %** in the **Flexfield Code** field. Click **Search**.
6. You will see the seeded flexfields for Service Logistics in the search results. You can edit the flexfields to add global segments that include both context segments and context-sensitive segments. Once you have set up and deployed the flexfields, the custom fields are displayed in the region where you have configured them. Let's

look at some sample configurations for Service Logistics. Note that this is for illustration purpose only and the fields that you configure will be specific to your business requirement.

Example 1: Manage Debrief and Charges page

Here you can see an example of custom entities added to the Debrief Headers Attributes flexfield.

This figure shows how custom entities are added to the Debrief Headers Attributes flexfield



There are two types of flexfields segments here:

- Global Segment: These custom attributes are always displayed. In the example above, the Landmark and Distance fields are global segments.
- Context Segment: These attributes determine which context-sensitive segments will be displayed. In the example above, Alternate Contact and Customer Info are set up as context segments. When the user selects the context segment Alternate Contact, additional attributes such as Customer Name and

Phone Number are displayed. These additional attributes are called context-sensitive segments which are displayed depending on the value of the context segment.

Example 2: Create Part Requirements page

Custom entities added to the Part Requirement Header Attributes flexfield.

This figure shows how custom entities are added to the Part Requirement Header Attributes flexfield

Note here that the Technician field is a global segment. The Technician Contact field is an example of a context-sensitive segment that's displayed only when the context segment Requirement Header is selected.

7. To understand more about descriptive flexfields, click on the related link.

Related Topics

- [Overview of Descriptive Flexfields](#)

