Oracle Service Logistics Cloud
Getting Started with Service Logistics Cloud Implementation
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

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. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- Guides and Videos: Go to the Oracle Help Center to find guides and videos.

- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

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<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
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Documentation Accessibility

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

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Purpose and Scope

This guide describes the use of simplified setups as a basis to help you get started with the setup tasks for Service Logistics.

Scope of This Guide

This guide covers the minimum set of tasks required to successfully implement Service Logistics Cloud. The topics in this guide will help you to:

- Enable Service Logistics Cloud.
- Set up stocking locations.
- Manage field service technicians.
- Manage billing types.
- Set up service activities.
- Manage service logistics lookups.
- Manage service logistics profile options.
- Set up Engagement Cloud
- Set up related products.

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 Logistic Cloud offering and implementing advanced features within the offering, see the Integrating Service Logistics Cloud with Oracle Field Service Cloud and the Using Service Logistics Cloud guides.

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

The tasks described in this guide assume you have a valid user name and password to sign in to the application and access the work areas.
2  Getting Started With Your Implementation

Service Logistics: Overview

Service Logistics Cloud delivers comprehensive field service capability and supply chain functionality enabling users to source and order parts for field service and parts only service, set up a variety of stocking locations, and manage the trunk stock of field service technicians.

Service Logistics Cloud is part of the Supply Chain Management Cloud suite and interacts with Engagement Cloud and other Supply Chain Management cloud products to support customer and field service.

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 Cloud products such as Inventory, Order Management, Pricing, Global Order Promising, and Product 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 Engagement Cloud

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

For information on the roles and privileges required to enable this functionality, see: Enabling Features for Parts Ordering using Engagement Cloud UIs: Procedure.

Integration with Oracle Field Service Cloud

You can also choose to download and set up the integration of Service Logistics with Field Service Cloud under the Customer Experience offering. This integration synchronizes field service technicians, their stocking locations, and corresponding inventory balances to Oracle Field Service Cloud.

For information on setting up the integration of Service Logistics Cloud with Field Service Cloud, see the Integrating Service Logistics Cloud with Field Service Cloud guide.
Enabling the Functional Areas for Service Logistics Implementation: Procedure

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

To enable the functional area for Oracle Service Logistics Cloud:

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**.

Enabling Users for Service Logistics: Procedure

To set up users for Service Logistics:

1. Create Service Logistics users by assigning the following role:
   a. Field Service Administrator - ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB

      Note that the Field Service Administrator role already has the following Supply Chain Management privileges by default:
      - FOM_IMPORT_ORDER_PRIV: Required by Service Request to create Sales Orders.
      - MSP_VIEW_PLANNING_SUPPLY_AVAILABILITY_PRIV: Required by Service Request and Work Order to use Global Order Promising to source the parts.
      - DOS_MANAGE_SUPPLY_ORCHESTRATION_WEB_SERVICES_PRIV: Required by Work Order to create Internal Material Transfers.
      - QP_PRICE_SALES_TRANSACTIONS_PRIV: Required by Service Request and Work Order to price the parts requirement.
      - PER_MANAGE_LOCATION_PRIV: Required by Work Order to create Human Resource (HR) Location for the Internal Material Transfer

2. Service Logistics users can source and order service parts for customer service and field service and initiate part returns using the Engagement Cloud Service Request and Work Order user interfaces. Service Logistics users require the following privilege to access the Parts user interfaces in the Engagement Cloud Service Request and Work Order pages:
   a. Manage Part Orders - SVC_MANAGE_PART_ORDERS_PRIV

      For details see: Enabling Features for Parts Ordering using Engagement Cloud UIs: Procedure
Enabling Features for Parts Ordering using Engagement Cloud UIs: Procedure

To allow users to create and manage part orders in Engagement Cloud user interfaces:

1. Assign the following job role to Engagement Cloud users of Service Logistics functionality:
   a. Service Logistics Job Role: Field Service Administrator - ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB.
   b. An Engagement Cloud job role that has the Manage Part Orders - SVC_MANAGE_PART_ORDERS_PRIV privilege. Without this privilege, the Parts region will be read-only in both Engagement Cloud Service Request and Work Order pages.

   The following Engagement Cloud duty roles are assigned the Manage Parts Order SVC_MANAGE_PART_ORDERS_PRIV privilege by default:
   - Service Request Troubleshooter - ORA_SVC_SR_TROUBLESHOOTER
   - Service Request Power User - ORA_SVC_SR_POWER_USER
   - Service Request Contributor - ORA_SVC_SR_CONTRIBUTOR
   - Service Request Administrator - ORA_SVC_SR_ADMINISTRATOR

   This table summarizes the job roles that are seeded with the duty roles mentioned above:
   
<table>
<thead>
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<th>Job Role</th>
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<td>Customer Service Manager</td>
<td>Service Request Power User</td>
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<tr>
<td>Customer Service Representative</td>
<td>Service Request Troubleshooter</td>
</tr>
<tr>
<td>Service Administrator</td>
<td>Service Request Administrator</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>Service Request Contributor</td>
</tr>
<tr>
<td>Sales Representative</td>
<td>Service Request Contributor</td>
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   If you create a new user, you must assign these roles and privileges to the new user along with Engagement Cloud job roles and run the Enterprise Service Scheduler (ESS): "Import User and Role Application Security Data".

2. Enable the feature in the Service offering by doing the following:
   a. Click the Navigator and then click Setup and Maintenance.
   c. On the Setup page, select the Service offering from the drop-down list.
   d. On the Opt In: Service page, click Features (Pencil icon) for Service.
   e. On the Edit Features: Service page, click Enable for Service Logistics Parts Order.
f. On the Feature Name: Service Logistics Parts Order page, select the check boxes for:
   - Service Request Parts Order
   - Service Request Work Order Parts Order

g. Click Save and Close.

h. On the Edit Features: Service page, click Done.

i. On the Opt In: Service page, click Done.

j. Check to verify that the Part Details tab is visible on the Service Request and Work Order pages.
3 Setting Up Stocking Locations

Stocking Locations: Overview

Stocking locations are used to store and stock parts. In Service Logistics, you will set up local and site dedicated stocking locations as technician subinventories and 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. For field service, service agents will order parts from central warehouses and ship them to these field stocking locations where they will be used by the field service technicians. Field service administrators can also transfer parts from these stocking locations to replenish the trunk stock subinventory of field service technicians.

Setting Up Stocking Locations: Procedure

You will need to set up stocking locations to stock, receive, and transfer parts for field service technicians.

To set up a stocking location:

1. Click Setup and Maintenance, then under the Manufacturing and Supply Chain Materials Management offering, click Service Logistics, and then click Manage Stocking Location.
2. On the Manage Stocking Location page, click the Add icon (Plus icon).
3. On the Add Stocking Location page:
   - Select a value in the Organization field from the list of valid inventory organizations.
   - Select a value in the Subinventory field, from the list of subinventories that appear for the selected organization.
   - Select Type as Technician.
   - Select Condition as either Usable or Defective.
4. Click Save and Create Another to save the details you have entered and open the Add Stocking Location page to set up another stocking location.
5. Upon entering the required information, click Save and Close.
Managing Field Service Technicians

Manage Field Service Technicians: Overview

You will need 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.

The first time a stocking location is assigned to a field technician, the Usage Type of Field Service Technician is assigned to the field technician’s Person Party. This assignment triggers the integration of Service Logistics Cloud with Field Service Cloud and makes them available as field technicians in Oracle Field Service Cloud.

Assigning Stocking Locations to Technicians: Procedure

The steps to assign a stocking location to a field service technician are:

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. On the Manage Field Service Technicians page, select a technician in the Technician field. This is a required step.
3. Click the Add icon (Plus icon).
4. On the Add Stocking Location page:
   - Select a value in the Organization field from the list of valid organizations.
   - Select a value in the Subinventory field from the list of valid subinventories that appear for the selected organization.
   - Check Enable to ensure the technician can use the selected subinventory.
   - Select Default to specify the selected subinventory as the default subinventory of the technician.
5. Click Save and Create Another to save the details you have entered and open the Add Stocking Location page to assign another stocking location to the field service technician.
6. Upon entering the required information, click Save and Close.
Editing Stocking Locations Assigned to Technicians: Procedure

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

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. 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:
  ail
   - **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 Managing Billing Types

Billing Types: Overview

Billing Types must be assigned in the Item Master to all service parts and consumables that you intend to use when creating part requirements for a service request.

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 associate billing types with your service activity codes. Service activity codes are used when creating a service part requirement and subsequently a sales order to specify whether the service activity code refers to a shipment order line or a return order line. The item to billing type and billing type to service activity code configuration filters the items in the Item list of values on the Add Part page to display only service items when parts are added to a service request.

The three Billing Categories seeded in Service Logistics are Labor, Expense, and Material and these cannot be extended.

Related Topics

- Item Specifications and Attributes: Explained

Viewing Billing Types and Billing Categories: Procedure

To view the seeded billing types and 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, click the Add icon (Plus icon), if you want to add a billing type.
6 Defining Service Activities

Service Activities: Overview

Service Activity Codes (SAC) are entered when a user creates a service request part requirement for customer replaceable parts. They determine whether to create a shipment order line or a return order line. SACs also determine the order line type for the part requirement and include the information needed to create sales orders for execution. Order line types that drive the order orchestration and accounting processes are set up in Order Management Cloud.

You will need to set up at least one service activity code for shipping parts to customers and one service activity code for creating return part order lines.

When setting up your service activity codes, you must 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.

Setting Up Service Activities: Procedure

To set up service activities:

1. Click Setup and Maintenance, then under 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 are defining.
4. In the Service Activity field, enter a name for the service activity you are 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 are defining, select from the values:
   - Order
   - Return goods
7. For Business Process, depending on the service activity you are defining, select from the values:
   - Customer support
   - Field service
8. For Order Line Type, select from the values that appear depending on the transaction category you have selected.
9. Note that the Create Order, Create Charge, and Zero Charge check boxes are currently not functional.
10. Enabled is checked by default.
11. Click Save.
12. To associate the service activity you set up to a billing type, in the Billing Type region, click the Add icon (Plus icon).
13. Select the appropriate billing type for the service activity.
14. Click Save and Close to save the changes and close the Manage Service Activities page.
7 Managing Service Logistics Lookups

Service Logistics Lookups: Overview

As a field service administrator, you can view, manage, and edit lookups for Service Logistics. Service Logistics Cloud uses the following lookups:

- **EGP_MATERIAL_BILLABLE TYPE**: Billing Types are used to identify which items in the Item Master can be used for Service. Note that only items with billing types can be used in Service Logistics Part Requirements user interface. There are four seeded values and customers can add their own.
- **ORA_DOO_LINE_TYPES**: Define line types for shipments.
- **ORA_DOO_RETURN_LINE_TYPES**: Define line types for return order lines.

Managing Service Logistics Lookups and Lookup Codes: Procedure

To manage the lookups for Service Logistics:

1. Click **Setup and Maintenance**, then under 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 is 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.
Managing Service Logistics Profile Options

Service Logistics Profile Options: Overview

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

- **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 transfer order.
- **RCL_DEF_PARENT_RESOURCE**: To specify the default parent resource name from Oracle Field Service Cloud which is used when downloading technicians, stocking locations, and inventory balances to Oracle Field Service Cloud.
- **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 then defaulted to the Create Return Line in the Service Request Parts Tab.
- **RCL_DEF_WORK_ORDER_AREA**: To specify the default work order area displayed when the user launches the Service Logistics landing page.

Viewing and Managing Service Logistics Profile Options: Procedure

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.
9 Setting Up Related Products

Setups in Related Products: Explained

This section describes the key setups required in the following applications to use Service Logistics properly:

1. **Inventory**:
   - Service Logistics depends on Inventory for the following setup:
     - **a.** Service supply chain organization.
     - **b.** Subinventories and inter organization parameters for transfer orders.
     - **c.** Default Inventory Organization (INV_DEFAULT_ORG_ID) - set this to show items in the Item list of values in the Engagement Cloud Parts tab and Add Parts page.
     - **d.** The following inventory sources setup:
       - **i.** Source setup at Destination Organization - Subinventory - Item level (Navigate to the Functional Setup Manager Task Manage Subinventories and Locators and then click the Manage Item Subinventories button)
       - **ii.** Source setup at Destination Organization - Subinventory level (Functional Setup Manager Task Manage Subinventories and Locators)
       - **iii.** Source setup at Destination Organization - Item level (Manage Items under Product Management, then Product Development or Product Information Management)

   For more information, refer to the Implementing Manufacturing and Supply Chain Materials Management guide.

2. **Product Management**:
   - Service Logistics depends on Product Management for the following item setup:
     - **a.** Create all the service items.
     - **b.** Assign the billing type attribute to all the service items and consumables that will be used for part requirement.

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

3. **Pricing Administration**:
   - Service Logistics depends on Pricing Administration for the following:
     - **a.** Customer Pricing Profiles.
     - **b.** Price List to set the price of the ordered or returned part.

   For more information, refer to the Administering Pricing guide.

4. **Global Order Promising**:
   - Service Logistics depends on Global Order Promising to identify the source warehouse, shipping method and arrival date for parts. The following setup must be complete:
     - **a.** Creating the ATP Rules to configure various parameters including select supply and demand types.
     - **b.** Assigning ATP Rules to item, organization or item organization.
c. Defining Sourcing Rules to set up source, sourcing type and other attributes. You must:
   i. Create Local Sourcing Rule for Transfer Order (Work Order Parts Order)
   ii. Create Global Sourcing Rule for Sales Order (SR Parts Order)

d. Assigning Sourcing Rules to Assignment Sets

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

Note that the Global Order Promising setup also depends on the following parameters being defined:
   o Shipping method.
   o Transit time from source to destination.
   o Carriers.

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

5. Order Management:

Service Logistics Cloud integrates with Order Management cloud to manage and facilitate parts shipping, receiving, and billing. Order Management uses orchestration processes to carry out the orders and returns execution. Process assignment rules are used to define the conditions that will trigger the orchestration process. These rules are defined so that no sales order line satisfies more than one rule at a given time. Service Logistics populates the line type for a given sales order line. Customers can use the line type to define the appropriate assignment rules to launch the appropriate orchestration process.

To ensure that the correct orchestration process is launched for the sales order lines created by Service Logistics, the following setup must be completed:

a. Order line types must be defined in Order Management. Order Management uses the following two lookup types to store line types:
   • ORA_DOO_LINE_TYPES for shipment lines
   • ORA_DOO_RETURN_LINE_TYPES for return lines.

b. When the Service Activity Codes are set up in Service Logistics, you must select the appropriate order line type for each service activity. When a sales order is created, the order line type associated with the service activity code is populated on the sales order line.

c. Service Logistics users can re-use existing Order Management orchestrations or define new orchestration processes as necessary to carry out the sales order execution.

d. Service Logistics users must define the Order Management Assignment Process rules to trigger the proper orchestration process for the appropriate order line types.

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