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## 1 Overview

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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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<tr>
<th>Convention</th>
<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>
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<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
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<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 Overview

## Oracle Service Logistics Cloud: Overview

Oracle Service Logistics, a cloud solution under the Oracle Supply Chain Management Cloud offering, allows users to run business processes that connect service request and field service dispatch flows to the supply chain. Using Service Logistics, you can:

- Source and order parts required to complete a service request or perform a work order.
- Receive parts shipped to field service technicians.
- Analyze stocking levels of various parts in the usable and defective subinventories assigned to field service technicians.
- Transfer parts to a technician stocking location or return defective and unused parts to the central or regional warehouse.

## Setting Up Service Logistics: Overview

To set up Service Logistics, you must complete the following setup tasks:

1. Set up Service Logistics users.
2. Set up field service stocking locations.
3. Assign stocking locations to field service technicians. Each technician must be assigned at least one usable and one defective stocking location.
4. Set up service activity codes for shipping parts to customers and creating a return line for service request part requirements. Associate a billing type with these service activity codes to filter the items available for selection when a sales order is created to complete a service request.
5. Manage the Service Logistics lookups that are referenced by service activity codes.
6. Set up the default values for the Service Logistics profile options. These values are used in the transfer order and sales order creation process.

For more information about setting up Service Logistics, see the Getting Started with Service Logistics Cloud Implementation guide.

Service Logistics cloud users can also integrate with Field Service Cloud for enhanced field service and mobile field service capabilities. This integration synchronizes field service technicians, their stocking locations, and corresponding inventory balances to Oracle Field Service Cloud. For information on setting up this integration, see the Integrating Service Logistics Cloud with Field Service Cloud guide.

For Service Logistics to function properly, features must be enabled or set up in Engagement Cloud and other Supply Chain Management cloud products as well. The next section provides an overview of the dependencies.
Dependencies and Interactions With Engagement Cloud and Other Supply Chain Management Cloud Applications: Overview

Oracle Service Logistics Cloud references the following supply chain management cloud applications:

- Global Order Promising Cloud to find parts, determine shipping method/carrier and calculate arrival date
- Pricing Cloud for service parts price list and pricing strategy
- Order Management Cloud to drive parts shipping and billing and to determine the order orchestration process
- Product Management Cloud to set up item master and inventory sources
- Inventory for creating transfer orders, receiving returns and tracking parts. Service supply chain inventory organizations and subinventories must also be set up prior to using Service Logistics.

Service Logistics users can order and return service parts using the Part Details tab on the Engagement Cloud Service Request and Work Order pages. Service Logistics users must have the required roles and privileges to create part orders in the Engagement Cloud user interface. The features must be enabled at the service offering.

For instructions on setting up Engagement Cloud and data in other SCM cloud applications, refer to the Getting Started with Service Logistics Cloud Implementation Guide.
2 Managing Service Part Requirements

Source and Order Service Parts: Explained

As a service agent, you can use Service Logistics to do the following:

- Create a sales order for customer replaceable service parts and consumables.
- Create a return material authorization for a defective part returned by the customer.
- Create a transfer order for a part that needs to be installed by the field service technician when a work order has been created for the service request.
- Create backorders for unavailable parts.

Service agents can source and order service parts using the Part Details tab in the Engagement Cloud Service Request and Work Order pages.

Ordering Customer Replaceable Parts: Procedure

To create a sales order for a part that can be installed and replaced by the customer:

1. Select the Service Requests menu from the Navigator page. On the Service Requests list page, create or select the service request that you want to add the part requirement to.
2. On the Edit Service Request page, click on the Part Details tab.
3. Click the Add icon (Plus icon) to access the Add Part page.
4. On the Add Part page, do the following to add a service part that needs to be shipped to the customer:
   a. Select a service activity from the Service Activity list of values. The service activity code determines if it is a part order line or return line.
   b. Select the item.
   c. Enter the quantity and need-by date.
   d. Select the customer address.
5. Click Add.
6. On the Part Details page, click Order. A sales order will be created.
7. Click on the Order Number to view the sales order details.
8. Click on the Item to view the source warehouse and shipping details.

Note the following:

- The amount charged to the customer is the sum of the shipping charges and the cost of the selected item. The cost of the item is derived from Pricing.
- The service activity is derived from the Service Activities page.
- The items are filtered based on the service activity and billing type association in the Service Activities page.
- The order line type is determined based on the service activity.
- The availability of the item, shipping method and arrival date are derived from Global Order Promising Cloud.
- The sales order creation to fulfillment process, parts shipping, receiving, and billing are derived from Order Management Cloud.
When the parts are shipped, an invoice will be generated for the customer. The bill-to account and address and shipping address must be set up for the customer for order fulfillment.

Initiating Part Returns: Procedure

To create a return material authorization for a defective part returned by the customer:

1. Navigate to the Service Requests page. Create or edit a service request to capture the details of the item returned by the customer.
2. On the Edit Service Request page, click on the Part Details tab.
3. Click the Add icon (Plus icon) to access the Add Part page.
4. Select the item to be returned. Select the appropriate service activity from the Service Activity list of values.
5. A defective warehouse is selected by default in the Destination Organization field. You can select an alternate defective warehouse to receive the returned parts.
6. Click Add.
7. On the Part Details tab, click Order.

A Return Material Authorization (RMA) number is created to track and receive the defective parts. A negative value in the amount column indicates the return line captured in the service request. When the part or item is received in the warehouse, a credit invoice is created and sent to the customer.

Note: You can use the same service request to order a replacement part as well as capture details of the defective item returned by the customer.

Ordering Technician Replaceable Parts: Procedure

To create a transfer order for parts required by a field service technician to complete a work order:

1. Select the Service Requests menu from the Navigator page. Create a new service request or select from an existing list of service requests.
2. On the Edit Service Request page, click on the Work Order tab.
3. Create or select the work order that you want to create the part requirement for.
4. On the Create Work Order page or Edit Work Order page, click on the Part Details tab.
5. Click the Add icon (Plus icon) to access the Add Part page.
6. Add the part detail by selecting the item and entering the quantity, need-by date, and shipping address. You can select the technician’s address or the customer address to ship the item to.
7. Click Add.
8. On the Part Details page, save the work order.

A transfer order is created for the selected item. Note the following:

- Service Logistics uses the Global Order Promising web service to determine parts availability, arrival date, and shipment details.
- The transfer order creation to fulfillment process is carried through web services provided by Supply Chain Orchestration cloud.
What happens if a part requested is not available?

When a part requested for a service request or work order is not available, a backordered sales order or transfer order line is created. The order will be processed when inventory is available.

Backorders: Explained

Service Logistics interacts with Global Order Promising cloud (GOP) to determine parts availability and return a source warehouse or subinventory when a sales order or transfer order is created. Global Order Promising may not return a source warehouse in the following conditions:

- Sourcing and ATP rules are not set up for the organization
- The quantity of the item required is not available at the source warehouse
- Requested items cannot be shipped before the need-by date

A default source must then be identified to create the sales order or transfer order.

For customer replaceable parts, if a default source cannot be identified, a backordered sales order line is created without a source, arrival date or shipment method.

For technician replaceable parts, if GOP does not return a source, the application will try to identify a default source warehouse based on the following inventory source setup:

- Source set up at the destination organization-subinventory-item level
- Source set up at the destination organization-subinventory level
- Source set up at the destination organization-item level

However, if a default source is returned, a transfer order is created without the arrival date and shipping method. If a source is not returned, the transfer order will not be created.

For information on setting up a default source for items, see the Getting Started with Service Logistics Cloud Implementation guide.

When the part or item requested is available, the backorder is processed and the item is shipped to the customer or field service technician. The order line details are updated to reflect the shipment method and arrival date.

Canceling Sales Order: Procedure

To cancel a sales order:

1. Select the service request with an existing sales order.
2. On the Service Request:Details page, click on the Part Details tab to view the parts added to the service request.
3. On the Part Details page, click on the **Delete** icon (Cross icon) to cancel the sales order associated with an existing part requirement line.

An Order Management web service is called to stop order fulfillment and cancel the sales order. If the sales order cannot be canceled, a message is displayed notifying the same to the user.
Canceling Transfer Orders: Procedure

To cancel a transfer order:

1. Select the service request with an existing work order with a part requirement line.
2. On the Service Request:Details page, click on the Work Order tab.
3. Click on the work order to access the Edit Work Order page.
4. On the Edit Work Order page, click on the Part Details tab to view the parts added to the work order.
5. On the Part Details page, click on the **Delete** icon (Cross icon) to cancel the transfer order associated with an existing part requirement line.

A Supply Chain Orchestration web service is called to stop order fulfillment and cancel the transfer order. If the transfer order cannot be canceled, a message is displayed notifying the same to the user.
3 Receiving Parts

Receive Parts: Overview

As a field service administrator, you can use receive parts shipped to a field service technician for a specific work order or to replenish the trunk stock for the selected technician. A transfer order is created for each shipment. You can choose to receive a single shipment or multiple shipments into the destination subinventory.

Receiving Parts into Technician's Trunk Stock: Procedure

To receive parts into the technician's trunk stock.

1. On the Receive Parts page, select the field service technician. The default destination organization and usable subinventory within that organization are displayed for the selected technician.

   ✷ Note: The default destination organization and usable subinventory are derived from the technician setup on the Manage Field Service Technicians page. For information, see the Assigning Stocking Locations to Technicians link below.

2. Search for a specific inbound transfer order using the Transfer Order number or Shipment number. You can search without entering these parameters if you want to view a list of all transfer orders for the selected technician.

3. Enter the quantity of the item that you want to receive. You can receive the entire shipment or a part of the shipment.

4. Select an alternative destination subinventory if you do not want to receive the parts into the default subinventory of the technician.

5. Click Receive Selected Lines.

6. You can navigate to the Manage Trunk Stock page to check the on hand quantity of the parts received.

Related Topics

- Assigning Stocking Locations to Technicians: Procedure
- Ordering Technician Replaceable Parts: Procedure
- Ordering Customer Replaceable Parts: Procedure
4 Managing Trunk Stock

Manage Trunk Stock: Overview

As a field service administrator, you can use the Manage Trunk Stock page to check the availability and stocking levels of various items in the usable and defective stocking locations of the selected technician.

For each item, the page displays the on-hand, available, and reserved quantities as well as the serial numbers of all the items. The Manage Trunk Stock page also displays the minimum and maximum recommended stocking level for each item and whether a particular item is in excess or shortage.

You can transfer parts to another technician’s trunk stock as well as return defective and unused parts back to the central or regional warehouse.

Note: Stocking locations are set up using the Manage Stocking Locations page. At least one usable and defective stocking location is assigned to each field service technician using the Manage Field Service Technicians page.

Related Topics

• Stocking Locations: Overview

• Manage Field Service Technicians: Overview

Transferring Parts to Another Stocking Location: Procedure

To transfer parts to another stocking location:

1. On the Manage Trunk Stock page, search for the item or part that you want to transfer using the following search parameters:
   - Select the technician.
   - Select the inventory organization.
   - Select the defective or usable subinventory.

2. Select the item from the Item list of values. Optionally, click Search to display a list of all the items in the selected stocking location.

3. Click Transfer.

4. On the Transfer Part page, select the destination stocking location using the technician, organization, and subinventory list of values. Note that the list of organizations available for selection are filtered based on the technician selected and the subinventory available depends on the organization selected.

5. For serial controlled items, select the serial number of the item. For items that are not serial controlled, you will need to enter the quantity.

6. Click Transfer to initiate the parts transfer.