Oracle Service Logistics Cloud

Integrating Service Logistics Cloud with Field Service Cloud

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Preface

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

Using Oracle 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 the Oracle Help Center to find guides and videos.

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

You can also read about it instead.

Additional Resources

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

- 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>Convention</th>
<th>Meaning</th>
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<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
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<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
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<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.

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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

Audience and Scope

This guide outlines the implementation and configuration steps required to integrate Oracle Service Logistics Cloud and Oracle Field Service Cloud to create a value-added business process and user experience. The administrator must enter the documented configurations and install the documented files to create the integration.

Each implementation of Oracle Field Service Cloud and Oracle Service Logistics Cloud is unique, and leads to the implementation of application customizations that support unique business requirements. While the steps in this document describe how to connect a non-customized Oracle Field Service Cloud instance to a non-customized Oracle Service Logistics Cloud instance, they can be combined with customizations that have already been applied to each instance.

Related Guides

To understand more about the information covered in this guide, refer to the following table for a list of related guides.

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<td>Getting Started with Oracle Service Logistics</td>
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2 Introduction

Integration Component Architecture Between Oracle Service Logistics Cloud and Oracle Field Service Cloud

Service Logistics Cloud enables customers to optimize parts logistics, source and order service parts, record costs and invoice customers. Field Service Cloud offers time-based, self-learning, and predictive technology to dispatch field service technicians to resolve customer issues.

The Service Logistics to Field Service Cloud integration offers the following:

Field Service Technicians Sync: Field Service Technicians are set up as Person Parties in Oracle Trading Community Cloud. Whenever a usage of Field Service Technician is added to a person, this signals to Oracle Integration Cloud that a Field Service Technician has been created. A usage of 'Field Service Technician' can be associated with a Person Party from several Oracle Cloud User Interfaces (UIs) including the Service Logistics Manage Field Service Technicians setup UI. An Integration Cloud Service is then executed to create the technician in Field Service Cloud if the technician doesn't exist or update the technician if they already exist.

Stocking Locations and Inventory Balances Sync: Subinventories defined in Inventory Cloud can be set up as Stocking Locations in the Service Logistics Manage Stocking Locations setup UI. Once defined as Stocking Locations, these subinventories are assigned a type of Technician. Stocking Locations can then be assigned to technicians in the Service Logistics Manage Field Service Technicians setup UI. Stocking locations hold parts inventory that technicians use when fixing customer issues. A background process is executed on a periodic basis that syncs stocking locations and their inventory balances from Inventory Cloud to Field Service Cloud.

Parts Integration: Field Service Technicians can access the Supply Chain Cloud parts UIs to find, order and receive the parts required to complete a work order. Field Service Administrators can view these part requirements in the Service Logistics Cloud application.

Field Service Debrief Integration: Field service activities are created when an Engagement Cloud work order is created. Field Service Technicians use the Oracle Field Service Cloud Debrief user interface on their mobile devices to report on the labor hours, parts used and recovered, and any expenses incurred on the activities assigned to them. These debrief transactions are automatically created in Service Logistics and are visible in the Edit Charges user interface. Field Service Administrators can then review these debrief transactions, make any adjustments or corrections and post the debrief transaction. This generates a customer invoice for billing, adjusts inventory balances, updates customer's asset configuration, and captures cost of service.
The following figure displays how Oracle Service Logistics Cloud components and Oracle Field Service Cloud components are integrated using Oracle Integration Cloud Service.

Oracle Service Logistics Cloud Integration Services
The following Oracle Service Logistics Cloud web services are used in this integration:

- `stockingLocations` REST API. Use this web service to get all subinventories identified as technician stocking locations.
- `trunkStocks` REST API. Use this web service to get inventory balances for technician stocking locations.
- `partRequirementLines` and `requirementLineDetails` REST APIs for Manage Part Requirements. Use these web service to create, edit, and delete part requirements.

Oracle Field Service Cloud Integration Services
The following Oracle Field Service Cloud web services are used in this integration:

- `resources` REST API. Use this web service to create and update Field Service Technician resources in the Oracle Field Service Cloud. The same REST API is also used to create or update resources of type Truck in the Oracle Field Service Cloud.
- `resources/custom-actions/bulkUpdateInventories` REST API. Use this web service to update inventory balances in technician stocking locations in Oracle Field Service Cloud.

Oracle Integration Cloud
The prebuilt integrations are available through Oracle Marketplace. You can log in and install the package directly into your Oracle Integration Cloud instance. The installation includes the following:

- Connection: Service Logistics FA REST
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- Connection: Service Logistics FA SOAP
- Connection: Service Logistics OFSC
- Connection: Service Logistics OFSC REST
- Connection: Service Logistics OSC
- Integration: Service Logistics Technician
- Integration: Service Logistics Inventory

To access the integrations in Oracle Marketplace, do the following:

1. Access Oracle Marketplace. You can either use the Search field and enter criteria such as Oracle Service Logistics Cloud to Oracle Field Service Cloud OIC Recipe, or do the following:
2. Select PLATFORM (PaaS) from the Products drop down list.
3. Select Oracle Integration.
4. In the Oracle Integration window, scroll and select Oracle Service Logistics Cloud to Oracle Field Service Cloud OIC Recipe.
5. Click Get App.
6. Read and accept the Terms and click Next.

The My Oracle Support page Integrating Oracle Service Logistics Cloud with Oracle Field Service Cloud (Doc ID 2481359.1) opens. This is where you can download the file.

**Note:** If Oracle Marketplace isn't available, you can download the prebuilt files from My Oracle Support Document 2481359.1 In the Attachments section, select the appropriate attachment for your implementation.

For additional information, you can check the topic 'Integration Component Architecture Between Oracle Engagement Cloud and Oracle Field Service Cloud' in the guide - Oracle Engagement Cloud Integrating with Oracle Field Service Cloud.

Related Topics
- Integration Component Architecture Between Oracle Engagement Cloud and Oracle Field Service Cloud

Requirements and Licensing

Subscriptions to the following cloud services are required for implementing the Oracle Service Logistics Cloud and Oracle Field Service Cloud integration using Oracle Integration Cloud Service:

- Oracle Service Logistics Cloud: The integration is designed to work with Oracle Service Logistics Cloud Release 19B or later.
- Oracle Field Service Cloud: The integration is designed to work with Oracle Field Service Cloud Release 19B or later.
- Oracle Integration Cloud Service: The integration is designed to work with Oracle Integration Cloud or Integration Cloud Service(ICS) version 18.4.5.0.0 or later.
3 Oracle Service Logistics Cloud Configuration

Configure Oracle Service Logistics Cloud

To configure Service Logistics Cloud for this integration, you must do the following:

1. Create the integration user that has the Field Service Administrator job role assigned.
2. Complete the following Service Logistics Setup:
   - Set profile option Default Parent Resource Name to match the top node in the resource hierarchy in Oracle Field Service Cloud. Note that the Default Parent Resource Name is a text field that must exactly match the external name of the resource in Oracle Field Service Cloud.
   - Set up field service technicians in the Manage Field Service Technicians user interface.
   - Setup stocking locations in the Manage Stocking Locations user interface.
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4 Oracle Field Service Cloud Configuration

Configure Oracle Field Service Cloud

To configure Oracle Field Service Cloud for the integration with Oracle Service Logistics Cloud, do the following:

1. Set up API Access in the Configuration - Application user interface.
2. Set up the unit of measures for the items that have inventory balances in the technician stocking locations. To do this:
   a. In Oracle Field Service Cloud, navigate to Configuration > Properties.
   b. Search for the property called UOM. Enter values for Unit of Measure and UOM Code.
5 Oracle Integration Cloud Service Configuration

Configure Oracle Integration Cloud Services

Oracle Integration Cloud Services is used to synchronize Oracle Service Logistics Cloud field service technicians, stocking locations, and inventory balances with Oracle Field Service Cloud. The following tasks must be performed to set up the secure integration between customer-specific instances:

1. Create the Oracle Integration Cloud User.
2. Import the Oracle Integration Cloud integration flows:
   a. Login to Oracle Integration Cloud.
   b. Navigate to Packages.
   c. Click the Import button.
   d. Select the file downloaded from the Marketplace.
3. Specify connection url and credentials for all five Service Logistics connections.
4. Once all connections are defined, activate the two Service Logistics integrations.

Verify Integration Synchronization

Follow the steps listed below to verify the synchronization.

In Service Logistics:

1. Open the Manage Field Service Technicians user interface.
2. Add a new person as a field service technician and assign a stocking location to the user.
3. Monitor the integration in Oracle Integration Cloud. If integration is successful, login to Oracle Field Service Cloud and verify that the technician is available.

In Oracle Integration Cloud, run the Service Logistics Inventory batch program as described below:

1. To run on demand:
   a. In OIC, navigate to Integrations.
   b. Search for Service Logistics Inventory.
   c. Verify that it's activated.
   d. Click on the menu icon to the right and select Submit Now.
2. To run on a schedule:
   a. In OIC, navigate to Integrations.
   b. Search for Service Logistics Inventory.
   c. Verify that it's activated.
   d. Click on the menu icon to the right and select Schedule. Follow the instructions to schedule the job according to your business needs.
6 Integration Process Flow

Understand How the Integration Works

To understand how the Service Logistics to Field Service Cloud integration works, see the following sections:

**Technician Synchronization** - Field Service Technicians are synchronized to Field Service according to the following steps:

1. The Oracle Integration Cloud flow is triggered by the "Update Person" event.
2. A SOAP Service is called to check if the person is a technician (usage FS_TECH).
3. An OFSC (Oracle Field Service Cloud) REST Service is called to check if resource already exists.
4. If resource doesn't exist:
   - A Service Logistics REST Service is called to get the parent node for the resource from profile **Default Parent Resource Name**.
   - OFSC REST Service is called to create the resource. The field service technician resource being created will be assigned a parent resource as defined in the profile.
5. If resource exists:
   - OFSC REST Service is called to update the resource.
6. The technician details that are uploaded to OFSC include:
   - Person Party ID
   - Full Name
   - Email
   - Mobile Phone Number
   - Status (active/inactive)

**Inventory Balances Synchronization** - Inventory balances for technician stocking locations are synchronized to Field Service according to the following steps:

1. The ICS (Integration Cloud Service) flow is triggered by a Schedule.
2. A Service Logistics REST Service is called to get all technician stocking locations.
3. OFSC REST Service is called to check if the stocking location already exists.
4. If stocking location doesn't exist:
   - OFSC REST Service is called to create the stocking location as a trunk resource.
5. Service Logistics REST Service is called to get inventory balances for the stocking location.
6. OFSC REST Service is called to replace inventory balances in Field Service.
7. The stocking location details that are uploaded to OFSC include:
   - Stocking Location ID
   - Stocking Location Name (Organization Code + Subinventory Name)
   - Item Number
   - Item Description
Parts Integration - Field Service Technicians need part item numbers to order replacement parts and to debrief usage and recovery. A batch program loads items from the Oracle Product Information Cloud to the Oracle Field Service Cloud using Oracle Integration Cloud. This integration downloads all items for the inventory organization defined in profile 'Default Inventory Organization'. Only items with Service Logistics Billing Type tied to Billing Category = Material are included. The item details downloaded include:

- Item Number
- Item Description
- Item Revision
- Primary Unit of Measure

Field Technicians can use the Service Logistics Parts UI to source and order parts as well as use the Service Logistics Receiving UI to receive parts orders.

Debrief Integration - Field Service Technicians can upload debrief transactions captured in Oracle Field Service Cloud to Supply Chain Cloud for review or corrections. Field service administrators can then post these transactions to generate sales invoice, update parts inventory and update asset configuration. The debrief information uploaded to Service Logistics Cloud include:

1. Labor Debrief
   - Service Activity
   - Labor Item
   - Start Time
   - End Time

2. Material Debrief
   - Service Activity
   - Item Number
   - Quantity
   - Unit of Measure

3. Expense Debrief
   - Service Activity
   - Expense Item
   - Amount
   - Currency Code