Oracle Service Logistics Cloud

Using Service Logistics Cloud

19D
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</tbody>
</table>
# Manage Field Parts Inventory

Overview of Managing Field Service Parts  
Transfer and Return Field Service Parts

# Report and Analyze

Overview  
Create Reports Using Oracle Transactional Business Intelligence (OTBI)
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.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</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>
</tr>
</tbody>
</table>
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

What's New

Learn about the topics that are new or significantly revised in each successive release.

Release 19D

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimate Charges</td>
<td>New topic: Understand how you can use the Manage Estimates UI to create a cost estimate for work orders before service.</td>
</tr>
<tr>
<td>Manage Field Parts Inventory</td>
<td>The Manage Trunk Stock UI has been renamed to Manage Field Parts Inventory as the functionality has been enhanced to include all kinds of stocking locations. The chapter title has been modified accordingly and the topics in the chapter have also been updated to reflect the updated functionality.</td>
</tr>
</tbody>
</table>

Release 19C

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Features</td>
<td>Revised topic: Introduces the new Return Routing feature.</td>
</tr>
<tr>
<td>Return Defective and Excess Parts</td>
<td>This is a new section that includes the following topics:</td>
</tr>
<tr>
<td></td>
<td>• What is Return Routing - Overview of the return routing feature.</td>
</tr>
<tr>
<td></td>
<td>• Route Customer Returns - Route defective parts returned by the customer to the appropriate warehouse.</td>
</tr>
<tr>
<td></td>
<td>• Route and Return Field Service Parts- Route defective and excess parts returned by field service technicians or from field parts stocking locations.</td>
</tr>
<tr>
<td>Report and Analyze</td>
<td>This is a new section that includes the following topics:</td>
</tr>
<tr>
<td></td>
<td>• Overview - Understand how field service parts delivery and parts profitability data can be analyzed.</td>
</tr>
<tr>
<td></td>
<td>• Create Reports Using Oracle Transactional Business Intelligence (OTBI) - Use the OTBI tool to create your reports.</td>
</tr>
</tbody>
</table>

Release 19B

The following topics are new or significantly revised.
<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Service Logistics Cloud: Overview</td>
<td>Revised topic: You can use Service Logistics to create part requirements for third party service requests and work orders, debrief Engagement Cloud and third party work orders, and post charges to generate sales invoice.</td>
</tr>
</tbody>
</table>
| Source and Order Parts | This section includes the following new topics:  
  • Create Part Requirements - Use the new Create Part Requirements user interface in Service Logistics to add part requirements to a service request or work order.  
  • Manage Part Requirements - Use the new Manage Part Requirements user interface in Service Logistics to edit part requirements.  
  • Cancel Orders - Cancel a sales order or transfer order using a button in the part requirements user interfaces |
| Review Service Charges and Initiate Billing | This is a new section that includes the following topics:  
  • Use the Service Logistics Landing page - Use the landing page to review key metrics about transfer orders and charges.  
  • Use the Manage Work Orders and Charges page - Use this page to view and manage charges for Engagement Cloud work orders and third party work orders.  
  • Create Charges for Work Orders - Create debrief transactions for third party work orders and Engagement Cloud work orders.  
  • Edit Charges for Work Orders - Make adjustments, corrections, add or remove debrief transactions, and post them.  
  • Adjust Service Charges - Make adjustments to charge amounts calculated by Pricing. |

**Features**

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 as well as replenish field service stocking locations. You can order parts for Engagement Cloud as well as third party service requests and work orders. You can also order parts to replenish field parts stocking locations.
- Receive parts shipped to field service technicians and other stocking locations.
- Analyze stocking levels of various parts in the usable and defective subinventories assigned to field service technicians.
- Transfer parts to various stocking locations.
- Return defective and unused or excess parts to the central or regional warehouse.
- Estimate charges for work orders before a service is performed and provide the cost estimate to customers.
- Create and edit debrief lines for Engagement Cloud and third party work orders.
- Review charges, adjust prices and post charges for Engagement Cloud and third party work orders.
Setup Guidelines

To configure Service Logistics:

1. Set up Service Logistics users.
2. Set up field service stocking locations.
3. Assign stocking locations to field service technicians. You must assign at least one usable and one defective stocking location to each technician.
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. Define return routing rules that will be used to route customer and field service parts returns automatically to the appropriate warehouse or repair location.
6. Manage the Service Logistics lookups that are referenced by service activity codes.
7. 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. It allows field service technicians to search for parts in the Supply Chain Management Cloud and create transfer orders requesting for these parts. The integration also pushes the debrief lines created by field service technicians to the Service Logistics user interface where field service administrators can review, edit, and post charges to create a sales invoice. For information on setting up this integration, see the Integrating Service Logistics Cloud with Field Service Cloud guide.

Service Logistics users depend on data set up in Engagement Cloud and other Supply Chain Management cloud products to run tasks. The next section provides an overview of the dependencies.

Dependencies and Interactions

This section explains the interaction and dependencies of Oracle Service Logistics Cloud with Engagement Cloud and other Supply Chain Management Cloud applications.

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.

As a Service Logistics user, you can order and return service parts using the Part Details tab on the Engagement Cloud Service Request and Work Order pages. You must have the required roles and privileges to create part orders in the Engagement Cloud user interface. You must enable these features 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 Source and Order Service Parts

Overview

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

• Order customer replaceable service parts and consumables.
• Order field service parts that need to be installed by the field service technician.
• Return defective and excess parts.
• Order parts to replenish the field stocking locations.
• Create backorders for unavailable parts.
• Bill customers for replacement parts and give credit for parts returned.

What happens when a part requirement is created?

• A Global Order Promising Cloud process runs to find the parts in the service supply chain, select the optimal shipping method, and calculate the estimated arrival date.
• An Oracle Pricing Cloud process runs to calculate the sales price. For field service part requirements, this is an estimated price. The final price is calculated after the field service debrief transactions for parts, labor, and expense are reviewed and submitted. For customer replaceable parts, the sales price is the actual price that will be charged to the customer and is passed on to the sales order.

Here are the two ways that you can create part requirements as a Service Logistics user:

Through Service Logistics User Interfaces:

• Source and order parts for Engagement Cloud service requests and work orders using the Manage Part Requirements and Create Part Requirements UIs
• Create part requirements for non-Engagement Cloud objects, such as a service request from a legacy customer service application or a third-party work order.
• Edit part requirements in the Manage Part Requirements UI.

Through the Engagement Cloud UIs:

• Create part requirements for Engagement Cloud work orders and service requests using the Part Details tab in the Engagement Cloud Service Request and Work Order pages. To do this, you must enable the required feature at the service offering. For instructions, see section Set Up Parts Ordering using Engagement Cloud UIs in the Getting Started with Service Logistics Cloud Implementation guide.

Note: You can't edit the part requirements created in the Engagement Cloud user interfaces in the Service Logistics > Manage Part Requirements UI. You can edit and cancel these part requirements only in the Engagement Cloud UIs.

Using Service Logistics Cloud User Interfaces
Create Part Requirements

Use the Create Part Requirements user interface to order service parts for:

**Field Service** - If you're a field service agent, you can source and order parts required to complete a work order. This could be an Engagement Cloud field service work order or work orders from a third party application. A transfer order is created to ship the required parts to a technician or customer address.

**Parts Only service** - You can order parts for an Engagement Cloud or third party service request when the defective part can be replaced by the customer and a field service technician is not required to visit the customer premises. You can use the same service request to capture the details of the defective part that's returned by the customer. A sales order is created to ship the required parts directly to the customer address.

**Field Service Stock Replenishment** - As a field service administrator, you can order parts to replenish all types of stocking locations including the technicians' trunk stock.

Let's look at the table below to understand the fields in the header region of the Create Part Requirements UI in detail.

Create Part Requirement UI - Header Field Descriptions

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
</table>
| Document Type   | Indicates what we are requesting parts for, such as a service request, work order or for replenishing a stocking location. Values are derived from the lookup code ORA_RCL_SOURCE_DOC_TYPE. Service Logistics Cloud has the following document types seeded:  
                   • Engagement Cloud Service Request  
                   • Engagement Cloud Work Order  
                   • Replenish Trunk Stock  
                   • Replenish Warehouse  
                   To order parts for third-party work orders such as from a legacy application, your system administrator must set it up as a Document Type using the Service Logistics lookup ORA_RCL_SOURCE_DOC_TYPE.  
                   The rest of the fields in the header are disabled or enabled and required or optional based on the Document Type selected.                                                                                                                                                   |
| Document Number | Numeric identifier for the service request or work order for which you are creating the part requirement.  
                   • For an Engagement Cloud service request, you must select from the list of values that shows all the SRs (with a customer party) for which a part requirement line has not been created and where SR Status Type is not Closed or Resolved.  
                   • For an Engagement Cloud work order, you must select from the list of values that shows all the non-cancelled work orders (with an associated service request that has a customer party) for which a part requirement line has not been created.  
                   • For a third party or customer defined document type, you manually enter the Document Number in an editable text field.  
                   • This field is disabled for the parts replenishment document types.                                                                                                                                                                                                       |
A<br>Attribute | Description
--- | ---
Note that other fields in the header region are automatically populated with details derived from the document number selected. This is explained in the sections that follow.

Ship To<br>Default value is:<br>- **Customer** when the document type is **Engagement Cloud Service Request** or **Engagement Cloud Work Order**.<br>- **Customer** and **Technician** when the Engagement Cloud Work Order has a technician assigned, thus allowing you to choose whether you want the parts shipped to the customer address or to the technician.<br>- **Technician** when document type is **Replenish Trunk Stock**.<br>- **Warehouse** when document type is **Replenish Warehouse**.<br>- No default value for customer defined document types.

Customer<br>Customer for whom the order is created. Value is required when the ship-to address type is **Customer**. It defaults from the service request selected for Engagement Cloud Service Requests document type. For Engagement Cloud Work Orders, it defaults from the service request associated with the work order.

When document type is customer defined, user can select from the list of values available.

Technician<br>Required when document type is 'Replenish Technician Trunk Stock'. User can select from a list of values.

When the document type is Engagement Cloud Work Orders and the work order has a technician assigned, the technician name defaults in this field.

Business Unit<br>Unit in which the order is requested. For EC service requests and work orders, the value is derived from the service request or work order selected. For customer defined document types and for **Replenish Warehouse** document type, users can select from the available list of values.

When technician details are entered for certain document types, the business unit is derived from the destination organization details of the technician’s default usable subinventory.

Shipping Address<br>Editable field only when the Ship To address type is **Customer** or **Technician**. If address type is Customer, LOV will display all of the Ship to Party Site Addresses for the selected Customer Party. If address type is Technician, LOV will display all of the selected Technician Party’s Ship to Party Site Addresses.

When address type is Warehouse, the shipping address is defaulted from the destination organization or subinventory selected.

Need By<br>Date before which parts are required. For Engagement Cloud service requests and work orders, the default date is derived from the service request or work order selected.

Destination Organization<br>List of values available for selection include all organizations modeled as Inventory Organization and with at least one subinventory set up in the Manage Stocking Locations UI.
In the sections below, you will learn how to use the Create Part Requirements UI to order parts for the different document types available.

**Add part requirement for service requests:**

This is a parts only service. The service request can be completed by shipping the replacement part directly to the customer.

1. In the Create Requirement UI, select **Engagement Cloud Service Request** in the **Document Type** field.
2. Select the service request number from the list of values in the **Document Number** field. **Address Type** is defaulted to **Customer** and the **Shipping Address** is the customer address derived from the service request. Fields that are not required are disabled.
3. Click on the **Add Part** button to go to the Add Part UI. Here you will select the item that you want to order to replace the defective part. Note the following about the fields in this UI.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination Subinventory</td>
<td>Subinventories set up under the selected Destination Organization and set up in the Service Logistics Manage Stocking Locations UI.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Activity</td>
<td>The Service Activity will drive the order line type. Service Activity names as set up by your system administrator in the Manage Service Activities setup UI. The LOV here will display only those Service Activities whose Billing Type is linked to Billing Category 'Material' and the Business Process is 'Customer Support'.</td>
</tr>
<tr>
<td>Item</td>
<td>The items are filtered based on the service activity and billing type association in the <strong>Manage</strong> Service Activities UI. Items assigned to the organization set up in the profile Default Inventory Organization. The Material Billable attribute must be checked for the item in the Item Master.</td>
</tr>
<tr>
<td>Revision</td>
<td>Revision values of selected item. Enabled only if the item is revision controlled.</td>
</tr>
<tr>
<td>Address Type</td>
<td>Customer</td>
</tr>
<tr>
<td>Shipping Address</td>
<td>Defaults to the Primary Ship-To address of the Customer Party.</td>
</tr>
</tbody>
</table>

4. Provide the item details and click **Add**. You can add more parts using the same steps. When you have added all the parts that you require, click **Order**.

**Create a Return Material Authorization(RMA) for a defective part:**

When a customer returns a defective part, it must be captured in the Service Request raised for the defect. This will allow you to generate a RMA for the part. You can use the Create Part Requirements UI to create a requirement line for the returned part.

1. Follow the same process as you would to order a new customer replaceable part.
2. In the Add Part UI, select a service activity code that has been set up for customer service returns. Then select the defective part being returned from the **Item** list of values. Enter the quantity. Use the information in the table below to enter additional information:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>Items assigned to selected Destination Organization.</td>
</tr>
<tr>
<td>Return Reason</td>
<td>Select from the list of values derived from lookup type DOO_RETURN_REASON.</td>
</tr>
<tr>
<td>Destination Organization</td>
<td>Value set for the profile option - Default Return Organization.</td>
</tr>
<tr>
<td>Destination Subinventory</td>
<td>Subinventories of the selected Inventory Organization.</td>
</tr>
</tbody>
</table>

3. Return to the main page (Create Part Requirement UI) and click **Order**.

**Order service parts required to fulfill a work order:**

Follow these steps when you need to order service parts that a field service technician requires to complete a work order.

1. In the Create Requirement UI, select **Engagement Cloud Work Order** in the **Document Type** field.
2. Select the work order number from the list of values in the **Document Number** field. The shipping address is automatically populated based on the work order details.
3. Click on the **Add Part** button to go to the Add Part UI. Enter the item details and use information from the table below to enter other details.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>Items assigned to selected Destination Organization.</td>
</tr>
<tr>
<td>Address Type</td>
<td>Customer or Technician. (Technician only displayed when the work order has a Technician Party assigned)</td>
</tr>
<tr>
<td>Address</td>
<td>If Ship To address type is Customer, the shipping address defaults to the Primary Ship To address of the Service Request Party (Party Site) as set up in MDM Organization UI. If Ship To address type is Technician, the address type defaults to the Primary Address of selected Technician (Party Site) as set up in MDM Person UI.</td>
</tr>
<tr>
<td>Destination Organization</td>
<td>Inventory Organizations set up in the Manage Stocking Locations UI.</td>
</tr>
<tr>
<td>Destination Subinventory</td>
<td>Subinventories of the selected Inventory Organization. For shipments, they must also be setup in the Manage Field Parts Inventory UI.</td>
</tr>
</tbody>
</table>

4. Return to the main page (Create Part Requirement UI) and click **Order**.

**Order parts for a third-party work order:**

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**Oracle Service Logistics Cloud**

**Using Service Logistics Cloud**

**Chapter 2**

**Source and Order Service Parts**
When the **Document Type** is customer defined (not seeded), all of the fields in the header region of the Create Part Requirement UI are enabled. You must enter the Document Number and then complete the other fields. The process to add a service part is the same as we follow for Engagement Cloud work orders.

**Replenish Technician Trunk Stock:**

As a field service administrator you will be ordering parts to replenish the trunk stock inventory of the field service technicians.

1. Select **Replenish Technician Trunk Stock** as your **Document Type** in the Create Part Requirement UI. You will not need a Document Number.
2. Select the technician name from the **Technician** list of values. Note that the other fields in the header region are automatically populated based on the technician selected.
3. Click on the **Add Part** button and enter the item details. The destination organization, subinventory, and address fields are populated based on the technician selection.
4. Click **Add**, return to the main page and then select **Order**.

**Replenish Warehouse:**

As a field service administrator, you will also be ordering parts to replenish the field service parts stocking locations.

1. Select **Replenish Warehouse** as your **Document Type** in the Create Part Requirement UI. Document Number is not required. **Address Type** is defaulted to **Warehouse** and disabled. Destination IO and Sub are required.
2. You must enter the **Business Unit**, **Destination Organization**, and **Destination Subinventory**.
3. Go to the Add Part UI and select the item.
4. Click **Add**, return to the main page and then select **Order**.

A sales order is created for item requirements for parts only service. A transfer order is created for all other item requirements such as for field service and warehouse and technician stock replenishment.

What happens when a transfer order is created?

- 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.
- Technicians receive the parts into their trunk stock and report the usage details when they create the field service debrief.
- Field service administrators review the labor, parts, and other expenses and post the final charges based on which a customer invoice is generated for billing.

How is the sales order fulfilled?

- The availability of the item, shipping method and arrival date are derived from Global Order Promising Cloud.
- Service Logistics Cloud integrates with Order Management Cloud to drive parts shipping, receiving and billing.

  When the parts are shipped, an invoice is generated for the customer. The bill-to account and address and shipping address must be set up for the customer for order fulfillment.

  The cost of the item is derived from Pricing. The amount charged to the customer is the sum of the shipping charges and the cost of the selected item.
Manage Part Requirements

Use the Manage Part Requirements user interface to view existing part requirements for:

- Engagement Cloud Service Requests and Work Orders
- Third party objects, for example, a legacy system service request
- Field stock replenishment

To view and edit existing part requirement lines:

1. On the Manage Part Requirements UI, enter your search criteria and then click **Search**. You will see a list of existing part requirements under **Search Results**.
2. Click on the Requirement Number to go to the Create Part Requirements UI and view the details and part requirement lines for the corresponding document type.
3. Here you can do the following:
   - Click on the **Add Part (Plus)** button to add parts to the existing requirement.
   - Click on the **Delete (X)** button to remove an existing part.
   - Click **Order** button to create a sales order or transfer order for the required part.
   - Click **Create Requirement** to navigate to a blank Create Part Requirements UI where you can create a new part requirement.

**Note:** Document Type indicates the source of the part requirement, for example an Engagement Cloud work order or service request, field service parts replenishment request, or a third party work order or service request. To use a non-Engagement Cloud object, such as a work order from a third party service application, you must define their document type in the Service Logistics lookup ORA_RCL_SOURCE_DOC_TYPE.

**Note:** You can't edit part requirements for Engagement Cloud service requests and work orders that have been created in the Engagement Cloud UIs.

Cancel Orders in the Part Requirements UIs

When an order has been created for the part requirement, the order number is displayed in the requirement line. To cancel the order:

1. Select the item and click on the **Delete(X)** button. This will cancel the order. The part requirement line will still be displayed.
2. To remove the requirement line, click on the delete button again.

Using Engagement Cloud User Interfaces
Order Customer Replaceable Parts

In this section, you will learn how to order parts using the Engagement Cloud UIs.

To order a part that can be installed by the customer:

1. Click **Service Requests** on the Navigator to go to the Service Requests UI. Here you can create a new service request or select an existing service request that you want to add the part requirement to.
2. When your service request is ready, go to the SR Details UI.
3. Under Edit Service Request, click **Parts**.
4. In the Parts tab, click the **Add (Plus icon)** button to go to the Add Part window.
5. On the Add Part window, 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's a part order line or return line.
   b. Select the item.
   c. Enter the quantity and need-by date.
   d. Select the customer address.
6. Click **Add**.
7. In the Parts tab, click **Order**. A sales order is created to ship the required part to the customer and generate an invoice for the same.
8. Click on the Order Number to view the sales order details.
9. Click on the Item to view the source warehouse and shipping details.

Order Technician Replaceable Parts

To order parts required to complete a work order:

1. Open the service request with an associated work order. If the work order doesn’t exist, you can create one using the **Create Work Order** option in the Work Order tab within the SR Details page.
2. When your work order is ready, click on the work order reference number to go to the Work Order Summary window.
3. Click on the Parts tab.
4. Click **Add (Plus icon)** button to access the Add Part window.
5. Select the item and enter the quantity, need-by date, and shipping address. You can select the technician’s address or the customer address to ship the item to.
6. Click **Add**.
7. On the Work Order - Parts tab, click **Save**.

A transfer order is created for the selected item.

What happens if a part requested isn't available?

When a part requested for a service request or work order isn't available, a backordered sales order or transfer order line is created. The order is processed when inventory is available.
Backorders

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 aren't set up for the organization
- The quantity of the item required isn't available at the source warehouse
- Requested items can't 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 can't be identified, a backordered sales order line is created without a source, arrival date or shipment method.

For technician replaceable parts, if GOP doesn't 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 isn't returned, the transfer order won't 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.

Cancel Sales Order

To cancel a sales order:

1. Open the service request with an existing sales order.
2. On the SR Details window, click Parts to view the part requirement lines created for that service request.
3. Select the part requirement line and click on the Delete (Cross icon) button to cancel the associated sales order.

An Order Management web service is called to stop order fulfillment and cancel the sales order. If the sales order can't be canceled, a message is displayed notifying the same to the user.

Cancel Transfer Order

To cancel a transfer order:

1. Open the service request with an existing work order.
2. Click on the Work Order tab and then click on the work order reference number.
3. Click on the Parts tab.
4. On the Work Order - Parts window, click on the **Delete** (Cross icon) button to cancel the transfer order associated with the corresponding part requirement line.

A Supply Chain Orchestration web service is called to stop order fulfillment and cancel the transfer order. If the transfer order can't be canceled, a message is displayed notifying the same to the user.
3 Return Defective and Excess Parts

What is Return Routing?

In field service supply chain:

- Defective parts returned by customers and field service technicians must be routed to the appropriate warehouse or repair location.
- Excess parts in field stocking locations must be returned to the proper inventory location.

In Service Logistics, you will use return routing to automatically determine the correct inventory location or warehouse (destination subinventory) to ship all your defective and excess parts to. You will set up return routing rules that will be used to route the item or part being returned based on a combination of factors such as the source, part or category, and return type. The source can be a technician or a warehouse or a customer. The return type categorizes the part or item being returned as excess of defective.

See the section Create and Manage Return Routing Rules in the Getting Started with Service Logistics Cloud Implementation guide to set up the return routing rules for your business organization.

If return routing rules aren’t set up or can’t be found, the destination subinventory is determined based on the value set up for the profile option RCL_DEF_RETURN_ORGANIZATION.

Route Customer Returns

To route defective parts returned by the customer:

1. Navigate to the Engagement Cloud Service Requests UI. Create or edit a service request to capture the details of the item returned by the customer. Open the service request.
2. Under the Edit Service Request options, click Parts.
3. In the Parts tab, click the Add (Plus icon) button to go to the Add Part window.
4. Select the appropriate service activity from the Service Activity list of values.
5. Select the item to be returned. Enter the quantity and Unit of Measure.
6. Enter a return reason if required.
7. You will see that the Destination Organization and Destination Subinventory fields are automatically populated to display the default destination warehouse for the part or item being returned. This is based on the return routing rule setup.
8. You can override this selection and choose an alternative warehouse.
9. After you have entered all the fields, click Add.
10. When you return to the Parts 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. The service agent then provides the customer with the return-to address and the Return Material Authorization number. When the part or item is received in the warehouse, a credit invoice is created and sent to the customer.
Route and Return Field Service Parts

Learn how to route defective parts returned by field service technicians and excess parts returned from warehouses.

1. Go to the Manage Field Parts Inventory UI.
2. Use the search parameters - Technician, Organization, and Subinventory to check the field stockroom or technician trunk stock inventory balance.
3. Select the item or part to be returned.
4. Click the Actions button and then click Return.
5. On the Return Part window, you will see that either the Organization field alone or both the Organization and Subinventory fields are automatically populated to display the default warehouse that’s determined based on the return routing rule setup.

   **Note:** User can return parts to any Inventory Organization that meets the following conditions:
   - Transfer Type = Direct between Source and Destination Inventory Organizations
   - Transfer Order Required = No between Source and Destination Inventory Organizations
   - Selected item is associated to Destination Inventory Organization

   **Note:** For defective parts inventory locations, the quantity defaults to the quantity on hand. For usable inventory locations, the quantity defaults to the excess amount (difference between the on-hand quantity and the maximum quantity)

6. Enter the quantity that you want to return.
7. For serial controlled items, enter the serial number of the item.
8. Click Return.

The selected parts are directly transferred from the field inventory location to the destination warehouse.
Overview of Service Charges and Billing

On completing a work order, field service technicians use the field service cloud user interface on their mobile devices to report on the labor hours, parts used or recovered, and any expenses incurred on the activities assigned to them. These debrief transactions can be against Engagement Cloud work orders or third party work orders.

- For Engagement Cloud work orders, technicians use Oracle Field Service Cloud to schedule their visit, execute the repair work, and create debrief transactions. When the technicians' change the status of the activity to completed, these debrief transactions are uploaded from Oracle Field Service Cloud to Oracle Service Logistics using Oracle Integration Cloud and Service Logistics REST APIs. The transactions are then visible in the Manage Work Orders and Charges page.
- For third party work orders using third party Field Service solutions, administrators can manually create and edit debrief transactions in the Create/Edit Charges pages.

The field service administrators review the debrief transactions; add or update the debrief information and post the charges. When charges are posted, a sales order is generated for invoicing and accounting. An SCM maintenance work order is also created for costing, inventory and installed base updates.

The following setup is required for service debrief and billing:

- Billing Types - Billing Types must be set up to determine the list of service activities that are displayed when creating part, labor, and expense debrief transactions. Billing Types also filter the list of items that are displayed when creating debrief transactions. Billing Types must be assigned in the Item Master to all service parts and consumables, labor, and expense items that are used when creating debrief transactions.
- Service Activity Codes - Service activities define the action performed or to be executed. For example Installation, Calibration, Cleaning, Install Part, Remove Part, Travel Expenses. Service activities are associated with billing types. This helps to filter the list of items that are displayed when adding part, labor, and expense debrief transactions for the service activity selected.
- Items in Inventory - All serviceable parts and consumables that technicians use to fix a defective asset must be set up in the Item Master and associated with a Material Billing Type. Labor and expense items must also be set up in the Item Master and associated with Labor and Expense Billing Types.
- Pricing for items - Price lists, pricing strategies, pricing segments and pricing rules must be defined for all items so that part, labor, and expense prices can be derived when creating and updating debrief transactions.
- To support debrief transactions for third party work orders, a Document Type must be set up to correctly identify the type of work order that appears in the debrief pages. The document type is defined in the lookup ORA_RCL_SOURCE_DOC_TYPE. The master data for the third party work orders such as business units, customers, price lists, items and asset configuration must also be available.

In the following sections, learn how to use the various charges related user interfaces to create, review, edit, and submit work order charges.
Use the Service Logistics Landing Page

A field service administrator can use the Service Logistics landing page to view key metrics on service charges and inbound transfer orders. These statistics provide the administrator with data to drive on-time delivery of parts to field service technicians and manage service charges.

Here’s what you can do:

<table>
<thead>
<tr>
<th>Callout</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>View simple statistics on field service debrief, such as the number of debrief headers that are in status New and the number of debrief headers with status Error. This infolet is filtered based on work area. Click on the number to go to the Manage Work Orders and Charges page and see a list of the work orders with debrief headers in that status.</td>
</tr>
<tr>
<td>2</td>
<td>See the total value of service charges for debrief lines that are new or in the status Error. This infolet is filtered based on work area. Click on any of the bars to go to the Manage Work Orders and Charges page and see the list of the work orders with debrief headers in that status.</td>
</tr>
<tr>
<td>3</td>
<td>View a list of work orders sorted in descending order of the total charge amount. The infolet displays the top 15 work orders and is filtered by work area. Click on any one of the work order numbers to go to the Edit Charges page for that particular work order.</td>
</tr>
</tbody>
</table>
Use the Manage Work Orders and Charges Page

Use the Manage Work Orders and Charges UI to view a list of work orders that have been debriefed or will be debriefed. On the Service Logistics landing page, click on the Tasks icon and then click on Manage Work Orders and Charges to access this page. You can also access this UI by clicking on any of the values in the Charges metric box on the Service Logistics landing page.

The Manage Work Orders and Charges UI displays the following data:

- A list of all the work orders created in Oracle Engagement Cloud.
- A list of all the third party work orders.
- Work order details and debrief status.
- A filter region to narrow the list of work orders and debrief transactions.

You can do the following:

1. Click Create Charges to create debrief transactions for third party work orders.
2. Click on the Document Number hyperlink to edit and submit charges for a debriefed work order in the Edit Charges UI. When you click on the document number for a work order that hasn't been debriefed, the Create Charges UI will be displayed with the work order header information populated. You can then create charges for the work order.
3. Click Create Estimates to estimate fixed and variable charges for a third-party work order.
4. Click the Manage Estimates icon next to the Estimate Status field for an Engagement Cloud work order to estimate charges for the order.
5. Hide the filter region from view. You can also create a new filter to display data relevant to you.
Estimate Charges

Service Logistics enables you to provide your customers with a cost estimate for the work order before the field service technician performs the service. You can estimate costs for variable charges such as labor, material, and expenses. You can also provide an estimate for fixed charges, for example a cleaning fee. An estimate of the work order cost helps the customer to decide if they want to proceed with repairing the defective product or asset. When the customer approves the estimated cost, the work order is carried out. When the work order is completed, the field service technician will create the debrief. The field service administrator will then review the debrief and post the charges to generate the customer invoice.

You can estimate charges for Engagement Cloud work orders as well as third-party work orders.

To estimate charges for Engagement Cloud work orders:

1. Open the Manage Work Orders and Charges page. From the list of work orders, select the work order that you want to estimate costs for.
2. Click on the Manage Estimates icon next to the Estimate Status field. The Manage Estimates page opens with the Estimates tab in focus. The work order details are displayed in the header.
3. To add an estimate line, click the Create (plus) button. The Add Estimates window opens. You will see that all the fields are empty at this stage and the following fields are read only: Quantity, UOM, Expense Amount, and Currency.
4. Select the service activity from the Activity list of values.
5. Select the item.
   - If the item is associated to Billing Type - Labor or Material, the Quantity and UOM fields are enabled.
   - If the item is associated to Billing Type - Expense, the Expense and Currency fields are enabled.
6. Enter the required details. Click Save and Close. The estimate line is created and displayed in the Estimates tab of the Manage Estimates page. Price of the item is displayed as derived from Oracle Pricing. The Save and Add Another option lets you save your estimate line and create another without having to exit the Add Estimates window.
7. Follow steps 1 through 6 to add more estimate lines. Check that:
   - Total Material = sum of all the estimated material charges
   - Total Labor = sum of all the estimated labor charges
   - Total Expenses = sum of all the expense charges
   - Grand Total = sum of all the estimated charges
8. You can edit an estimate line by selecting the row and clicking on the Edit (pencil) icon. You can delete the line by selecting the row and clicking on the Delete (X) icon.

To estimate charges for third-party work orders:

2. Enter the work order details. Follow the same process as described above to create your estimates.
When the customer approves the estimated cost of the work order, you can move the **Estimate Status** to **Approved**. You will no longer be able to add, edit, or delete the estimated cost for that work order.

## Create Charges for Work Orders

Use the Create Charges UI to enter labor, parts, and other expenses debrief for third party work orders or for Engagement Cloud work orders that have been resolved using third party field service solutions.

To create charges:

1. Open the Create Charges UI.
   - Click **Create Charges** in the Manage Work Orders and Charges UI. Select the **Document Type** and enter the work order details.
   - In the Manage Work Orders and Charges UI, a list of work orders are displayed, some of which aren't yet debriefed. Click on the **Document Number** hyperlink for any of these work orders to go to the Create Charges UI. Note that the header details are already populated.
2. In the Create Charges UI, click on the **Labor Debrief** tab and then click on the **Create (Plus)** button to access the **Add Labor Details** window and record expenses incurred on labor. Once you have saved your record, you can edit or delete the debrief line if required.
3. Follow the same process to add details related to parts and other expenses.

## Edit Charges for Work Orders

You use the Edit Charges UI to review debrief information and make adjustments, corrections, add or remove debrief transactions, and post them. When charges are posted, the cost of the service is captured and a sales invoice is generated for the customer. The inventory balance is also adjusted based on the parts used or returned and the customer's asset configuration is updated.

Debrief transactions created in Oracle Field Service Cloud for Engagement Cloud work orders are automatically transferred to Service Logistics Cloud via web services. These work orders are visible in the Manage Work Orders and Charges page. To review and post charges for these work orders, you must click on the **Document Number** hyperlink to access the Edit Charges page.

For third party work orders, you must create the charges in the Create Charges page first. You can then review and edit the charges and post it in the Edit Charges UI.

To edit and post charges:

1. Select the work order that you want to edit charges for and open it in the Edit Charges UI.
2. Review the labor, part, and expense debrief information. You can add a new debrief line or remove an existing debrief line. You can also edit an existing debrief line.
3. Click on the **Charges** tab. This region displays the summary of all charges incurred on the work order and the total amount that will be invoiced to the customer.
4. To manually adjust the price of any item at this stage, click on the pencil icon in the **Amount** column. For details on adjusting service charges, see section Adjust Service Charges.
5. After you have reviewed all charges and finalized the prices, click **Post Charges**.
Adjust Service Charges

You review parts, labor, and expense debrief transactions recorded by field service technicians in the Edit Charges page. The price of the parts used and labor hours spent is derived from a price list set up in Oracle Pricing Cloud. When there is a discrepancy between the price that the customer was promised and the price set up in Oracle Pricing Cloud, you can manually adjust the price in the Edit Charges page to match the promised price. This ensures that the customer is charged accurately for the service when the debrief transactions are posted.

To manually adjust the prices of items:

1. In the Edit Charges page, select the item in the Parts or Labor debrief tab for which you want to adjust the price. The **Your Price** column reflects the price as returned by Oracle Pricing.
2. Click on the pencil icon in the **Amount** column.
3. In the **Edit Price** window that pops up, enter the new price in the **Override** field.
4. Select a reason for price adjustment. Save your record.

**Note:** The price of an item can only be changed when:

- Charges haven't yet been posted.
- The 'Allow manual adjustment' check box is selected in the Charge Line for the item when it's being priced in Oracle Pricing.
5 Receive Parts

Receive Parts

As a field service administrator, you can receive parts into a technician's trunk stock or field parts stocking locations to ensure that service parts are available on hand to support field service operations. You can choose to receive a single shipment or multiple shipments into the destination subinventory.

1. On the Receive Parts page, select the Destination Organization. You can select any inventory location set up in our Manage Stocking Locations UI when querying inbound transfer orders. If you are receiving parts into a technician's trunk stock, you must select the technician first. The default destination organization and usable subinventory within that organization are displayed for the selected technician.

2. Select an alternative destination subinventory if you don't want to receive the parts into the default subinventory of the technician.

3. 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 destination organization.

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

5. Click Receive Selected Lines.

6. You can navigate to the Manage Field Parts Inventory page to check the on hand quantity of the parts received.
6 Manage Field Parts Inventory

Overview of Managing Field Service Parts

Use the Manage Field Parts Inventory page to manage field parts in manned, unmanned and site-dedicated parts stocking locations, as well as in technician trunk stocking locations.

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

As a field service administrator:

- transfer parts to stocking locations (subinventories) set up in the Service Logistics Cloud- Manage Stocking Locations UI.
- return defective, unused, and excess parts back to the central or regional warehouse

Transfer and Return Field Service Parts

To transfer parts to another stocking location:

1. On the Manage Field Parts Inventory page, search for the item or part that you want to transfer. If transferring from a technician's trunk stock, specify the technician name.
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 the Actions drop-down button and then click Transfer.
4. On the Transfer Part page, select the destination stocking location. List of values displays all inventory organizations with a subinventory set up in the Manage Stocking Locations page. If transferring to a technician's trunk stock, you must select the technician first. In that case, all organizations with subinventories assigned to the technician will be displayed.
5. For serial controlled items, select the serial number of the item. For items that aren't serial controlled, you will need to enter the quantity.
6. Click Transfer to initiate the parts transfer.

To return defective, unused, and excess parts to the appropriate warehouse, see the task below:

Related Topics

- Route and Return Field Service Parts
7 Report and Analyze

Overview

Use the Oracle Transactional Business Intelligence (OTBI) solution to analyze and report on:

- Service Parts Profitability: Analyze parts sales, returns, exchanges, and replacements created in the Engagement Cloud Service Request UI or in the Service Logistics Manage Parts Requirements UI.
- Parts Delivery Performance: Analyze parts delivery performance for both customer service sales orders (parts sales, exchanges, returns) and field service parts transfer orders.

Here are some of the key business questions that these reports will address:

- What is the revenue of parts business?
- What is the revenue of parts sales?
- Did we make or lose money on part exchanges?
- What is the revenue of parts category?
- How much core credit was issued?
- How often did customer ordered parts arrive on time?
- How often did field service ordered parts arrive on time?

Create Reports Using Oracle Transactional Business Intelligence (OTBI)

Oracle Transactional Business Intelligence (OTBI) provides predefined analytics and reports that help you to analyze data to support your business needs. You can access the analyses, reports, and dashboard for Service Logistics using the Reports and Analytics options under the Tools menu in the Navigator. The repository is organized into subject areas. Each subject area contains the columns corresponding to a specific business area or object in your cloud application. You will use these columns to select the data that you want to analyze and report on. To learn how to use OTBI to create analyses and reports, see the Creating and Administering Analytics and Reports for SCM guide.

To navigate to the subject areas for Service Logistics:

1. In the Navigator, click on Reports and Analytics, and then click on Browse Catalog. This will take you to the Oracle Business Intelligence dashboard.
2. Click New to access the options in the drop-down list.
3. Click Analysis in the drop-down list. You will see the Select Subject Area dialog box.
4. As you scroll down, you will see the following two subject areas for Service Logistics:
   - Service Logistics - Parts Fulfillment Performance Real Time
   - Service Logistics - Service Parts Profitability Real Time
5. Click on the subject area that you want to analyze. The page is refreshed to display the columns available under that subject area.
6. You can now proceed to create your analysis.