Oracle SCM Cloud

Getting Started with Service Logistics Implementation

20A
## Contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td></td>
<td>i</td>
</tr>
<tr>
<td>1</td>
<td>About This Guide</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Purpose and Scope</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>How to Use This Guide</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>What’s New in Service Logistics Implementation</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Get Started With Your Implementation</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Overview of Service Logistics</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Enable the Functional Areas for Service Logistics Implementation</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Create Users for Service Logistics</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Enable Support for Third Party Work Objects</td>
<td>7</td>
</tr>
<tr>
<td>3</td>
<td>Stocking Locations</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>How Do We Use Stocking Locations</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Set Up Your Stocking Locations</td>
<td>9</td>
</tr>
<tr>
<td>4</td>
<td>Field Service Technicians</td>
<td>11</td>
</tr>
<tr>
<td></td>
<td>Overview of Field Service Technicians Setup</td>
<td>11</td>
</tr>
<tr>
<td></td>
<td>Assign Stocking Locations To Technicians</td>
<td>11</td>
</tr>
<tr>
<td></td>
<td>Edit Stocking Locations Assigned to Technicians</td>
<td>11</td>
</tr>
<tr>
<td>5</td>
<td>Billing Types</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>Overview of Billing Types</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>View Billing Types and Billing Categories</td>
<td>13</td>
</tr>
<tr>
<td>6</td>
<td>Service Activities</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Understand Service Activities</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Set Up Service Activities</td>
<td>15</td>
</tr>
</tbody>
</table>
### 7 Return Routing Rules
- What is Return Routing? 17
- Create and Manage Return Routing Rules 17

### 8 Service Logistics Lookups
- List of Service Logistics Lookups 19
- Manage Service Logistics Lookups and Lookup Codes 20

### 9 Service Logistics Profile Options
- List of Service Logistics Profile Options 23
- Manage Service Logistics Profile Options 23

### 10 Related Oracle Cloud Products
- Give Users Access to B2B Service UIs 25
- Overview of Enabling Service Requests and Work Orders to use Installed Base Asset 26
- Set Up Data in Related Products 26

### 11 Set Up Depot Repair
- How can I set up Oracle Service Logistics Cloud for Depot Repair? 33
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 About This Guide

Purpose and Scope

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

Scope of This Guide

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

- Enable Service Logistics.
- Set up stocking locations.
- Assign stocking locations to field service technicians.
- Manage billing types.
- Set up service activities.
- Define return routing rules.
- View and edit lookups.
- Manage profile options.
- Set up B2B Service.
- Set up related products.

References and Help

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

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

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

Note: With release 20A (11.13.20.01.0), "Oracle Engagement Cloud" is now known as Oracle CX Sales and Oracle B2B Service. Existing Oracle Engagement Cloud users will retain access to Oracle CX Sales and B2B Service features under their preexisting licensing agreements. Any new users created within your current Oracle Engagement Cloud license count will also retain the same access to Oracle CX Sales and Oracle B2B Service. To obtain additional features or manage your subscription, refer to your Oracle Cloud Applications Console. This document describes features available to users under Oracle CX Sales, Oracle B2B Service, and Oracle Engagement Cloud licensing agreements.
How to Use This Guide

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

Prerequisites

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

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

Assumptions

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

What's New in Service Logistics Implementation

Get details about help topics that are new or significantly revised for each release.

Release 20A

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Users for Service Logistics</td>
<td>Revised topic. Includes information on new role Depot Repair Manager.</td>
</tr>
<tr>
<td>Set Up Depot Repair</td>
<td>New chapter. Includes information on the attributes that need to be set up in order to use the new Depot Repair functionality in Service Logistics.</td>
</tr>
</tbody>
</table>

Release 19D

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Users for Service Logistics</td>
<td>Revised topic. Includes the new privilege required for users to use the Manage Estimates UI.</td>
</tr>
<tr>
<td>Set Up Your Stocking Locations</td>
<td>Revised topic. Updated to include information on setting up all kinds of stocking locations, for example, manned, unmanned, site-dedicated as well as technician stocking locations.</td>
</tr>
</tbody>
</table>

Release 19C
### Topic | Description
--- | ---
Create Users for Service Logistics | Revised topic. Includes details about new privileges added to the Field Service Administrator role.
Return Routing Rules > Overview | New chapter and topic. Learn about return routing rules and how they're used to automatically route defective and excess parts to the appropriate location or warehouse.
Create Return Routing Rules | New topic. Learn how to create return routing rules for your organization.
Overview of Service Logistics Profile Options | Revised topic. Includes the new profile option for return routing rules.
Data Setup in Related Products | Revised topic. Includes new details about setting up data in other SCM Cloud applications.

### Release 19B

| Topic | Description |
--- | ---|
Create Users for Service Logistics | Revised topic. Includes details about the new privilege required to access the Service Logistics Landing page and the debrief UIs. |
Enable Support for Third Party Work Objects | New topic. Learn how to set up Service Logistics to handle third party service requests and work orders. |
Set Up Service Activities | Revised topic. Includes details about the check boxes related to charges. |
Overview of Service Logistics Lookups | Revised topic. Includes a new table listing the lookups. Also includes the new lookup required for third party objects. |
Data Setup in Related Products | Revised topic. Includes new details about data in Pricing and Oracle Order Management Cloud Service. |
2 Get Started With Your Implementation

Overview of Service Logistics

Service Logistics delivers field service capability and supply chain functionality enabling users to source and order parts for field service and parts only service, review debrief lines, and submit charges for parts, labor, and expenses incurred. Using the Service Logistics work area, you can order parts for service requests and work orders that are created in Oracle B2B Service UIs. You can also order parts for third party service requests and work orders. You can set up a variety of field stocking locations and manage the trunk stock of these stocking locations as well as the inventory of field service technicians. Service Logistics also offers depot repair functionality so that you can manage the repair and return of broken parts.

Service Logistics is part of Oracle Fusion Supply Chain Management Cloud and interacts with Oracle B2B Service and other Supply Chain Management cloud products to support customer and field service.

Dependencies on other SCM Cloud Products

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

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

Interaction with B2B Service

As a Service Logistics user, you will be able to source and order service parts and initiate returns using the parts functionality in the B2B Service - Create Service Request and Create Work Order pages.

For information on the roles and privileges required to enable this functionality, see: Enabling Features for Parts Ordering using B2B Service UIs: Procedure.

Support for Third Party Service Requests and Work Orders

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

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

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

Enable the Functional Areas for Service Logistics Implementation

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

1. Click the Navigator, and then click Setup and Maintenance.
2. On the Setup page, select the Manufacturing and Supply Chain Materials Management offering from the drop-down list.
5. Click Done.

Create Users for Service Logistics

Set up users for Service Logistics:

1. Create Service Logistics users by assigning the following roles:
   a. Field Service Administrator - ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB
      The Field Service Administrator role already has the following Supply Chain Management privileges by default:
      - FOM_IMPORT_ORDER_PRIV: Required by Service Request to create Sales Orders.
      - MSP_VIEW_PLANNING_SUPPLY_AVAILABILITY_PRIV: Required by Service Request and Work Order to use Global Order Promising to source the parts.
      - DOS_MANAGE_SUPPLY_ORCHESTRATION_WEB_SERVICES_PRIV: Required by Work Order to create Internal Material Transfers.
      - QP_PRICE_SALES_TRANSACTIONS_PRIV: Required by Service Request and Work Order to price the parts requirement.
      - PER_MANAGE_LOCATION_PRIV: Required by Work Order to create Human Resource (HR) Location for the Internal Material Transfer.
b. Depot Repair Manager - ORA_RCL_DEPOT_REPAIR_MANAGER_JOB

   This role gives the user access to the Manage Depot Repair UI and the Depot Repair Workbench UI.

2. To allow your admins to use the Oracle Transactional Business Intelligence (OTBI) tool to analyze and report on service parts profitability and parts delivery performance, check that the following BI duty rule is assigned to the Field Service Administrator Job Role: FBI_SERVICE_LOGISTICS_TRANSACTION_ANALYSIS_DUTY

3. Note the privileges assigned to the Field Service Administrator to use REST Services to query, create, update and delete Service Logistics debrief transactions for parts, labor and expenses:

   - RCL_PORTAL_CREATE_DEBRIEF_TRANSACTIONS_BY_SERVICE - Create Debrief Transactions
   - RCL_ACCESS_STOCK_LOC_DETAILS_BY_SERVICE_PRIV - Access Stocking Location

Enable Support for Third Party Work Objects

To manage part requirements and orders for third party objects such as a service request or work order from a legacy customer service application:

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

   Note: The following master data must be available in Oracle Cloud in order to create debrief lines for third party work orders:

   - Customers - Name, Bill-To Accounts, Bill-To Addresses
   - Technicians
   - Item master
   - Pricing
3 Stocking Locations

How Do We Use Stocking Locations

Stocking locations are used to store and stock parts. In Service Logistics, you can set up various stocking location types, such as manned, unmanned, site dedicated stocking locations as well as technician stocking locations. You will then assign these stocking locations to all the field service technicians that can use parts from them. Each field service technician must be assigned one default usable and defective trunk stock location. Service agents order parts from central warehouses and ship them to these field stocking locations where they will be used by the field service technicians. Field service administrators can also transfer parts from one stocking location to another to replenish the warehouse or the inventory of field service technicians. You can also use field stocking locations to track both usable and defective parts.

Set Up Your Stocking Locations

Set up a stocking location:

1. Under Setup and Maintenance, select the Manufacturing and Supply Chain Materials Management offering, and then click Service Logistics. See the list of tasks displayed for Service Logistics on the right-hand pane. Click Manage Stocking Location.
2. On the Manage Stocking Location page, click the Add icon (Plus icon).
3. On the Add Stocking Location page:
   - Select the Organization from the list of valid inventory organizations.
   - Select a Subinventory from the list of subinventories that appear for the selected organization. Note that the word 'subinventory' here's the industry equivalent of a warehouse.
   - Select the type of field parts stocking location. The four seeded values are Technician, Manned, Unmanned, and Site Dedicated.
   - Select Condition as either Usable or Defective.

   Note: Field parts stocking locations must have been set up as Inventory Organizations and Subinventories before they can be set up as Service Logistics stocking locations.
4. Save your record.
5. When you set up a site dedicated stocking location, you will be able to add or remove party site addresses to it. On the Manage Stocking Locations page, you will see an icon under the Address column against each site dedicated location. Click on the icon to access a Details window. You can add the site addresses here.
6. Follow the same process to set up another stocking location.
4 Field Service Technicians

Overview of Field Service Technicians Setup

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

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

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

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

Assign Stocking Locations To Technicians

Assign a stocking location to a field service technician:

1. Under Setup and Maintenance, select the Manufacturing and Supply Chain Materials Management offering, and then click Service Logistics. In the list of setup tasks that you can see, click Manage Field Service Technicians.
2. On the Manage Field Service Technicians page, select a technician in the Technician field.
3. Click the Add icon (Plus icon).
4. On the Add Stocking Location page:
   - Select your Organization from the list of valid organizations.
   - Select a subinventory from the list of valid subinventories that appear for the selected organization.
   - Check Enable to ensure the technician can use the selected subinventory.
   - Select Default to specify the selected subinventory as the default subinventory of the technician.
5. Click Save and Create Another to save the details you have entered and open the Add Stocking Location page to assign another stocking location to the field service technician.
6. Enter the required information. Click Save and Close.
Edit Stocking Locations Assigned to Technicians

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

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

Overview of Billing Types

Billing Types are assigned in the Item Master to all service parts and consumables that you intend to use when creating part requirements for a service request. Billing Types must also be assigned to all labor and expense items that are used in debrief transactions.

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

How are Billing Types used in Service Logistics?

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

Billing types also determine the list of service activities that are displayed when creating part, labor, and expense debrief transactions as well as filter the list of items available for selection.

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

View Billing Types and Billing Categories

To view the seeded billing types and billing categories:

1. Click Setup and Maintenance, then under the Manufacturing and Supply Chain Materials Management offering, click Service Logistics, and then click Manage Billing Types.
2. On the Manage Billing Types page, click the Add icon (Plus icon), if you want to add a billing type.

Note: There are three non-extensible billing categories seeded in Service Logistics - Labor, Expense, and Material. Billing Categories are used to map items to their debrief user interfaces, for example Expenses, Parts, and Labor through the billing types assigned on the item master.
6 Service Activities

Understand Service Activities

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

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

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

You must set up at least one service activity code for shipping parts to customers and one service activity code for returning defective or excess parts.

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

Set Up Service Activities

To set up service activities:

1. Under Setup and Maintenance, select the Manufacturing and Supply Chain Materials Management offering. Click Service Logistics and then click Manage Service Activities.
2. Click the Add icon (Plus icon) to add a new Service Activity.
3. In the Service Activity Code field, enter a unique code for the service activity you’re defining.
4. In the Service Activity field, enter a name for the service activity you’re defining, for example Customer Return.
5. In the Description field, enter a description for the service activity, for example Returned from customer.
6. For Transaction Category, depending on the service activity you’re defining, select from the values:
   - Order
   - Return goods
7. For Business Process, depending on the service activity you’re defining, select from the values:
   - Customer support
8. **Field service**

8. **Order Line Type**, select from the values that appear depending on the transaction category you have selected.

9. Select the **Create Order** check box to control which charge lines created in Service Logistics are passed to Order Management. If this check box is selected, the charge line is passed to Order Management so that customers can be invoiced accurately. Don’t select this check box if you want the order orchestration process to be carried out in a third-party Order Management application.

10. Select the **Zero Charge** check box if you don’t want to charge customers for parts covered under warranty or a contract, or for additional labor or extra parts that weren’t planned for the original repair.

11. **Enabled** is checked by default.

12. Click **Save**.

13. To associate the service activity you set up to a billing type, in the Billing Type region, click the **Add** icon (Plus icon).

14. Select the appropriate billing type for the service activity.

15. Click **Save and Close** to save the changes and close the Manage Service Activities page.
7 Return Routing Rules

What is Return Routing?

When customers, field service technicians, and field parts stocking location administrators return defective parts, they need to be transferred to the appropriate warehouse or repair location. Excess parts in a field stocking location or a technician’s trunk stock must also be returned to the optimal warehouse. As a field service administrator, you can set up return routing rules to automatically determine the warehouse to which these parts must be returned. Routing rules are a combination of values such as zone or stocking location, item category and item number that are applied to select a destination warehouse. These rules are used in the Add Part and Return Part UIs of the Service Logistics application. In the next section, learn how to create Return Routing Rules for your organization.

Create and Manage Return Routing Rules

You can create two types of Return Routing Rules using the Manage Return Routing Rules UI in Service Logistics:

• Return Routing Rules for defective parts returned by the customer
• Return Routing Rules for defective and excess parts being returned from field stocking locations and field technicians

To create the Return Routing Rules:

1. Click Setup and Maintenance, then under the Manufacturing and Supply Chain Materials Management offering, click Service Logistics, and then click Manage Return Routing Rules.
2. You will see the Manage Return Routing Rules UI with a Search header and results region. Here you can query for the return routing rules for your organization after you have set them up.
3. To add a new rule, click the Add (Plus) icon in the Search Results region. You will see the Add Return Routing Rule window.
4. Add values for the new rule:
   - Select the Return Source Type. This could either be Zone or Organization and Subinventory. Use 'Zone' to create a return routing rule for a customer return. Use 'Organization and Subinventory' to create the rule for all field service returns.
   - Source Organization and Source Subinventory - Enabled only if Return Source Type is 'Organization and Subinventory'. List of values includes all inventory organizations and subinventories with a Stocking Location Type of Field Technician.
   - Zone - Enabled only if Return Source Type is 'Zone'. Includes all zones set up in the Manage Shipping Zones UI using the Zone Type defined in the Service Logistics Profile Option (Return Routing Zone Type). When a customer returns a part, a TCA API is run to determine the applicable return routing zone based on the customer’s address. The zone determines which return routing rule is applied to default the destination subinventory.
   - Return Type - Defective or Excess.
   - Item Catalog and Item Category - helps to filter the Item list of values if you're going to set up return routing rules for specific items. Note that you can create return routing rules at just the item category level.
- Item - LOV displays all Items with Billing Type tied to Billing Category "Material" and, if entered, the Item Category.
- Destination Organization - The inventory organization.
- Destination Subinventory - All subinventories in the destination organization selected.
- Enabled - Select Yes or No to Indicate whether this rule should be enabled for your organization or not.

5. Click Add.
# 8 Service Logistics Lookups

## List of Service Logistics Lookups

Refer to the table below for a list of the lookups that Service Logistics uses. Note that you will only be able to view and edit the extensible lookups in the Manage Service Logistics Lookups UI.

<table>
<thead>
<tr>
<th>Name/Code</th>
<th>Description</th>
<th>Seeded Values</th>
<th>Extensible?</th>
</tr>
</thead>
<tbody>
<tr>
<td>EGP_MATERIAL_BILLABLE_TYPE</td>
<td>Billing Types are used to identify which items in the Item Master can be used for Service. Note that only items with billing types can be used in Service Logistics Part Requirements user interface.</td>
<td>Labor, Material, Expense, Consumable.</td>
<td>Yes</td>
</tr>
<tr>
<td>ORA_DOO_LINE_TYPES</td>
<td>Define line types for shipments.</td>
<td>None</td>
<td>Yes</td>
</tr>
<tr>
<td>ORA_DOO_RETURN_LINE_TYPES</td>
<td>Define line types for return order lines.</td>
<td>None</td>
<td>Yes</td>
</tr>
<tr>
<td>ORA_RCL_BUSINESS_PROCESS</td>
<td>Identify which part of the business executes the work order.</td>
<td>FLDsrv (Field Service), CUSTSupport (Customer Support), and DEPOTREPAIR (Depot repair).</td>
<td>No</td>
</tr>
<tr>
<td>ORA_RCL_SOURCE_DOC_TYPE</td>
<td>Identify the Service Logistics source document type, for example whether it's a service work order or service request from the B2B Service UIs or a third party work order or service request.</td>
<td>EC_SR (Engagement Cloud Service Request), EC_WO (Engagement Cloud Work Order), REPLENISHMENT and REPL_WAREHOUSE (Replenish warehouse and Technician Trunk Stock), RMA (Return Material Authorization)</td>
<td>Yes</td>
</tr>
<tr>
<td>ORA_RCL_USAGE_CODE</td>
<td>Identify how a part was used to resolve the Work Order.</td>
<td>USED, UNUSED, DOA (Defective on Arrival)</td>
<td>No</td>
</tr>
<tr>
<td>ORA_RCL_DEBRIEF_STATUS</td>
<td>Defines the status of a brief line.</td>
<td>NEW, POSTED, ERROR</td>
<td>No</td>
</tr>
<tr>
<td>ORA_RCL_ADDRESS_TYPE</td>
<td>Categorizes the shipping address into different address types.</td>
<td>ACCOUNT, TECHNICIAN, CONTACT</td>
<td>No</td>
</tr>
</tbody>
</table>
### Manage Service Logistics Lookups and Lookup Codes

To manage the lookups for Service Logistics:

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

### Service Logistics Lookups

**Name/Code** | **Description** | **Seeded Values** | **Extensible?**
--- | --- | --- | ---
ORA_RCL_QUANTITY_LEVEL | Indicate the quantity level of items or parts in the technicians' trunk stock. | SHORTAGE, EXCESS | No
ORA_RCL_YES_NO | Indicate a yes or no condition. | Y, N | No
ORA_RCL_STOCK_LOC_TYPE | Identify the stocking location type. | TECHNICIAN | No
ORA_RCL_STOCK_LOC_CONDITION | Identify if the stocking location is good/usable or defective. | GOOD, DEFECTIVE | No
ORA_RCL_WORK_AREA | Used to default the work area on the Service Logistics landing page. Users can define their own work areas. | None. | Yes
ORA_RCL_IMT_STATUS | Indicate the status of a material transfer. | SHIPPED, NOTSHIPPED, SHIPPEDDATE, NOTSHIPPEDDATE, SUBMITTED, SUPPLY_REQUEST CANCEL_SUBMITTED | No
12. In the **Meaning** field, enter a value for the lookup code that would be visible for selection in the list of values. This is a required field.
13. Optionally, in the **Description** field, enter a description for the lookup code.
14. Optionally, in the **Tag** field, enter a tag for the lookup code.
15. Click **Save and Close**.
16. Click **Done** to close the Manage Service Logistics Lookups page and return to the Service Logistics Tasks list.
9 Service Logistics Profile Options

List of Service Logistics Profile Options

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

- RCL_DEF_DESTINATION_ORGANIZATION: To specify the default destination organization where parts will be shipped when a part requirement is created for a work order and before a field service technician has been assigned to the work order.
- RCL_DEF_EMPLOYEE_NAME: To specify the default employee to be used as the preparer name and deliver-to name while creating transfer order.
- RCL_DEF_PARENT_RESOURCE: To specify the default parent resource name from Oracle Field Service which is used when downloading technicians, stocking locations, and inventory balances to Oracle Field Service.
- RCL_DEF_RETURN_ORGANIZATION: To specify the default return organization where the part returned by the customer is to be received, set the profile option Default Return Organization. The organization is then defaulted to the Create Return Line in the Service Request Parts Tab. This profile is used when no Return Routing Rule has been set up that covers the customer or inventory return.
- RCL_DEF_WORK_ORDER_AREA: To specify the default work order area displayed when the user launches the Service Logistics landing page.
- RCL_RETURN_ROUTING_ZONE_TYPE: To specify the zone type used by the Service Logistics Manage Return Routing Rules setup UI.
- RCL_DEF_DEPOT_SAC_ISSUE - To specify the default service activity used for parts issued to depot repair order.
- RCL_DEF_DEPOT_SAC_RECOVER - To specify the default service activity used for parts recovered from depot repair order.

Manage Service Logistics Profile Options

To view and manage profile options:

1. Click Setup and Maintenance, then under the Manufacturing and Supply Chain Materials Management offering, click Service Logistics, and then click Manage Service Logistics Profile Options.
2. The Manage Service Logistics Profile Options page lists the profile options used by the product. To view details of a profile option, click on the profile option name.
3. The Search Results: Profile Option region displays details of the profile option code, the profile display name, the application and its module that uses the profile option, the start and end dates, and the description of the profile option.
4. The Profile Values region displays the profile level set for the profile option. You can only edit a profile option to select a profile level for it.
5. To edit the profile level for a profile option, you can select Edit from Actions, or click the Edit icon.
6. In the Profile Level field, select from Site or User. This is a required value.
7. Optionally in the Profile Value field, select an organization from the list of values.
8. Click **Save and Close**.
9. Click **Done** to close the Manage Service Logistics Profile Options page and return to the Service Logistics Task list.
Give Users Access to B2B Service UIs

To give Service Logistics users access to the B2B Service UIs:

1. Ensure that they have the Service Logistics Job Role: Field Service Administrator - ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB.
2. Assign a B2B Service job role that has the Manage Part Orders - SVC_MANAGE_PART_ORDERS_PRIV privilege. Without this privilege, the Parts region will be read-only in both the Service Request and Work Order pages.

The following B2B Service duty roles are assigned the Manage Parts Order SVC_MANAGE_PART_ORDERS_PRIV privilege by default:

- Service Request Troubleshooter - ORA_SVC_SR_TROUBLESHOOTER
- Service Request Power User - ORA_SVC_SR_POWER_USER
- Service Request Contributor - ORA_SVC_SR_CONTRIBUTOR
- Service Request Administrator - ORA_SVC_SR_ADMINISTRATOR

See the job roles that are seeded with the duty roles and hence the Manage Parts Order privilege:

<table>
<thead>
<tr>
<th>Job Role</th>
<th>Duty Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service Manager</td>
<td>Service Request Power User</td>
</tr>
<tr>
<td>Customer Service Representative</td>
<td>Service Request Troubleshooter</td>
</tr>
<tr>
<td>Service Administrator</td>
<td>Service Request Administrator</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>Service Request Contributor</td>
</tr>
<tr>
<td>Sales Representative</td>
<td>Service Request Contributor</td>
</tr>
</tbody>
</table>

3. If you create a new user with these roles and privileges, run the Enterprise Service Scheduler (ESS): “Import User and Role Application Security Data” so that the user data reflects in your system.

4. Enable Service Logistics Opt In:
   a. Log in as a setup user. Navigate to Setup and Maintenance.
   b. Select Service as functional area (Setup drop-down list) and click Change Feature Opt In.
   c. Click on the Features (pencil icon) for Service. Click the Enable icon (pencil icon) for 'Service Logistics Parts Order'.
   d. Select 'Service Request Parts Order' and 'Service Request Work Order Parts Order'. Save and Close.
   e. Check to verify that the Part Details tab is visible on the Service Request and Work Order pages.
Overview of Enabling Service Requests and Work Orders to use Installed Base Asset

To post charges for work orders, an Installed Base asset is required. Therefore, you must opt-in to use the Engagement Cloud Installed Base Asset feature on service requests and work orders.

You can add the Installed Base asset to the service request in the Engagement Cloud Service Request UI. After it's been added, the asset is automatically added to the work order created for the service request. This information then flows through to Field Service so that the technician knows which asset to repair. When the field technician submits a debrief, the details of the parts that were used to complete the repair flow back to Service Logistics (which is part of the Engagement Cloud-Service Logistics integration). In the Service Logistics Edit Charges UI, the asset details default from the service request. The field service administrator then uses this information to determine the associated service charges.

**Note:** If the Installed Base asset isn’t selected when the service request is created, the field service administrator will need to select the Installed Base asset in the Service Logistics Edit Charges UI before they can post the related charges. For more information about opting into Installed Base Assets, see the Implementing B2B Service guide.

**Related Topics**
- Implementing B2B Service

Set Up Data in Related Products

This section describes the data that must be set up in other Oracle cloud applications to use Service Logistics properly:

1. **Inventory Management:**
   - Data that needs to be set up in Inventory Management for Service Logistics is:
     a. Service supply chain organization.
     b. Subinventories and inter organization parameters for transfer orders.
     c. Default Inventory Organization (INV_DEFAULT_ORG_ID) - set this to show items in the Item list of values in the Parts tab and Add Parts page of the B2B Service UIs.
     d. The following inventory sources setup:
       i. Source setup at Destination Organization - Subinventory - Item level (Navigate to the Functional Setup Manager Task Manage Subinventories and Locators and then click the Manage Item Subinventories button)
       ii. Source setup at Destination Organization - Subinventory level (Functional Setup Manager Task Manage Subinventories and Locators)
       iii. Source setup at Destination Organization - Item level (Manage Items under Product Management, then Product Development or Product Information Management)
   
   For more information, refer to the Implementing Manufacturing and Supply Chain Materials Management guide.

2. **Product Master Data Management:**
Item details that must be set up in Product Master Data Management is as follows:

- Create all the service items.

  **Note:** Customers must set up their serviceable Products/Item Numbers (products for which an SR can be created) in both the SCM Item Master and the CRM Catalog.

- Assign the billing type attribute to all the service items and consumables that will be used for part requirement.

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

**3. Pricing Administration:**

Service Logistics depends on Pricing Administration for the following:

- Customer Pricing Profiles.
- Price List to set the price of the ordered or returned part.
- Pricing rules to allow or disallow manual adjustments.

For more information, refer to the Administering Pricing guide.

**4. Global Order Promising:**

Service Logistics depends on Global Order Promising to identify the source warehouse, shipping method and arrival date for parts. The following setup must be complete:

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

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

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

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

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

**5. Order Management:**

Service Logistics integrates with Order Management to manage and facilitate parts shipping, receiving, and billing.

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

- Orchestration Processes - Order Management uses orchestration processes to carry out the orders and returns execution.
Process Assignment Rules - Rules define the conditions that will assign the orchestration process. They are defined so that no sales order line satisfies more than one rule at a given time.

Order Line Types - Customers use the order line type to define the assignment rules to launch the appropriate orchestration process. For each sales order line/fulfillment line, if that line meets the conditions of the rule, it will launch the orchestration process for the order fulfillment.

a. How to set up sales order fulfillment for Parts Only service?

i. Define order line types in Order Management. Use the following two lookup types to store line types:
   - For shipment lines - ORA_DOO_LINE_TYPES
   - For return lines - ORA_DOO_RETURN_LINE_TYPES

ii. Select the proper order line type for every Service Activity Code that you have defined in the Service Logistics > Service Activities Setup UI. When a sales order is created, the order line type associated with the service activity code is populated on the sales order line.

iii. Create a custom order orchestration process that will enable you to bypass GOP while creating the sales order. This is necessary so that the parts don't get resourced from a different warehouse with a different shipment method and arrival time than the one that's displayed on the Parts UI and communicated to the customer.

iv. Define the Order Management Assignment Process rules to trigger the proper orchestration process for the appropriate order line types.

v. Set up a Pretransformation Defaulting Rule to default the payment terms for a sales order. For information, see chapter Business Rules in the Implementing Order Management guide.

You can choose from these seeded values as required:

- Seeded DOO Process used for SR Parts Only flow - DOO_OrderFulfillmentGenericProcess
- Seeded OM Line Type used for SR Parts Only flow - Buy
- Seeded DOO Process used for SR Parts Return flow - ReturnOrderGenericProcess
- Seeded OM Line Type used for SR Parts Return flow - Return for credit and return the item

b. How to set up bill-only sales order fulfillment for Field Service?

Learn how to set up the Debrief Bill-only sales order fulfillment process.

i. Create a user defined order line type-'Bill Only' for the Service Logistics debrief lines under the OM lookup type - ORA_DOO_LINE_TYPES.

ii. Select this order line type for the service activities that you have created for labor, expense, and recovered parts as well as debrief install lines.

iii. Set up pricing by adding this line type to Oracle Pricing lookup type - ORA_QP_ORDER_LINE_TYPES.

iv. Check that the item price is set up under the 'Bill Only' order line type.

v. Create a new Process Assignment Rule such as 'RCL Bill Only DOO Process for Debrief'. Assign the seeded bill-only order orchestration process to your bill-only line type. Activate and publish the rule.

   - Seeded DOO Process used for Debrief Bill-Only flow - DOO_BillOnlyGenericProcess

vi. Set up the Pretransformation Defaulting Rule to default the payment terms for the bill-only sales order for debrief.

vii. Set up the Pretransformation Defaulting Rule to default the payment terms for the bill-only sales order for debrief.
For information on defining and assigning orchestration processes, refer to the Implementing Order Management guide. Note that for order fulfillment the bill-to-address and bill-to-account for customers must also be set up properly.

6. Oracle Fusion Shipping

In Service Logistics, ‘Zone’ based return routing rules are set up to automatically determine the destination warehouse for defective parts returned by the customer. The zones here refer to the shipping zones. Before using the Manage Return Routing Rules UI to create your rules, you must ensure the shipping zones have been set up in the Manage Shipping Zones UI in the Shipping functional area under the Manufacturing and Supply Chain Materials Management offering.

**Set up Asset, Item, and Organization for Maintenance Work Orders**

When a work order is completed and debriefed, the field service administrator reviews the charges submitted by field service technicians. The field service administrator may then add or edit the debrief lines, make price adjustments if required and post the charges. At this stage, a maintenance work order is created to capture the cost of the service, adjust the inventory balances and update the asset configuration. It’s important that items, assets, and the inventory organization is configured properly so that the maintenance work order is created successfully.

<table>
<thead>
<tr>
<th>What to configure?</th>
<th>Where to configure?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory organization as maintenance organization</td>
<td>Setup and Maintenance &gt; Manufacturing and Supply Chain Materials Management</td>
</tr>
<tr>
<td>Plant parameters for the maintenance organization</td>
<td>Setup and Maintenance &gt; Manufacturing and Supply Chain Materials Management</td>
</tr>
<tr>
<td>Relationship between maintenance organization and operating organization</td>
<td>Setup and Maintenance &gt; Manufacturing and Supply Chain Materials Management</td>
</tr>
<tr>
<td>Items</td>
<td>Product Master Data Management &gt; Product Information Management</td>
</tr>
<tr>
<td>Assets</td>
<td>Supply Chain Execution &gt; Maintenance Management</td>
</tr>
</tbody>
</table>

Let’s look at the steps in detail:

1. Field service technicians are assigned to subinventories from where they can source and receive parts. These subinventories belong to an inventory organization. Check that this inventory organization is set up as a maintenance organization as it will be used to create the maintenance work order.

   Here’s how:

   a. Under **Setup and Maintenance**, navigate to the **Manage Inventory Organizations** task:

      - Offering - Manufacturing and Supply Chain Materials Management
      - Functional - Area Facilities
      - Task - Manage Inventory Organizations

   b. Query the inventory organization.
c. Click Manage Organization Parameters.
d. Verify that the check box Organization performs maintenance activities is selected.

2. Check that the plant parameters are configured for your maintenance organization. Plant parameters determine the various functionality of the organization specific to work definition and work execution.

   a. Under Setup and Maintenance, navigate to the Manage Plant Parameters task:
      - Offering - Manufacturing and Supply Chain Materials Management
      - Functional Area - Manufacturing Master Data
      - Task - Manage Plant Parameters
   b. Verify that your Maintenance Organization is selected and has the plant parameters set up.

3. Set up relationships between your field service trunk stock organizations (maintenance enabled) and the operating organization of the assets that will be serviced from those field service trunk stock parts. Assets are set up under an operating organization which is the organization from where the asset is shipped from (for customer assets).

   a. Under Setup and Maintenance, navigate to the Manage Maintenance Organization Relationships task:
      - Offering - Manufacturing and Supply Chain Materials Management
      - Functional Area - Maintenance Management
      - Task - Manage Maintenance Organization Relationships
   b. Search for your maintenance organization.
   c. Select the required operating organization from the right pane to associate the two.

   Note: It is recommended that you associate only one maintenance organization with each operating organization.

4. Check your item configuration.

   a. Under Product Management, go to the Product Information Management work area.
   b. In the task slide out panel, under Item Management click Manage Items.
   c. Search for your item.
   d. Click on the item to go to the Edit Items page.
   e. Click the Specifications tab and then click on Service under the Item Organization category.
   f. Check that the following two parameters are set as follows:
      - Enable Asset Tracking = Full Lifecycle
      - Allow Maintenance Asset = Yes
   g. Then, click on Inventory under the Item Organization category.
   h. Check that the attribute for Serial number generation is configured as:
      - Generation = Dynamic entry at inventory receipt

5. Check that the attribute Allow work orders is selected for all assets. This is required for creating a maintenance work order against the asset. Here’s some additional information about assets:

   - Assets are created in the Manage Assets page of the Maintenance Management work area.(See "Create Assets" in the Getting Started with Your Maintenance Implementation guide)
   - Assets are also automatically created during sales order fulfillment. (More information on "Track Items as Assets" in the Implementing Order Management guide)
You can also use Installed Base assets for your service requests and work orders. (See “Expose Installed Base Assets” in the Implementing B2B Service guide.)

To configure the attribute that allows for the creation of maintenance work orders:

a. Under Supply Chain Execution, go to the Maintenance Management work area.
b. You will be prompted to select an organization. Here you must select the operating organization of the asset whose configuration you are about to check.

c. Note: Remember that the operating organization of the asset must be related to a maintenance organization.
d. You will now see the Maintenance Management landing page. In the tasks slide out panel, under Asset and Work Definition, click Manage Assets.
e. Click Show Filters. Enter any detail as a search criteria and click Search. A list of assets matching the search criteria are displayed in the right-hand pane.
f. Click on the asset number link. This will take you to the asset ‘Overview’ page.
g. Verify that the Allow work orders check box is selected for the asset.
11 Set Up Depot Repair

How can I set up Oracle Service Logistics Cloud for Depot Repair?

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

1. Set up an Inventory Organization for each repair depot. Depot repair organizations must be separate from the inventory organizations used to maintain assets in Oracle Maintenance Cloud.
2. Set up Depot Repair Service Activity Codes (SAC) and Order Line Types.
   - To set up the business process for Customer Support - Set up Service Activities for the return of broken product and shipment of repaired product. Create order line types and order orchestration processes to execute the order lines created with these SACs.
   - To set up the business process for Depot Repair - Set up Service Activities for the labor and parts used during repair execution in Maintenance Cloud.
3. Set up Service Logistics profile options to define values for:
   - the default service activity for parts issued to the depot repair order
   - default service activity for parts recovered

These values are used when creating Service Logistics debrief and charges transactions after the technicians have created the debrief for the repair order in Maintenance Cloud.
4. Ensure that either the Return Routing Rules are created. If no Return Routing Rules are defined, a default return organization must be set up using the profile option - RCL_DEF_RETURN_ORGANIZATION.
5. Set up the Service Logistics Labor SAC lookup codes to match the maintenance work order (MWO) Labor Activity lookup codes. This code is required when creating Service Logistics labor debrief records from MWO labor transactions.
6. Set up Labor Item numbers to match the name of the MWO resource type that will be used to capture repair labor time. This code is required when creating Service Logistics labor debrief records from MWO labor transactions.