

# SCM Cloud

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## **Using Service Logistics**

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

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.

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# 1 Overview

## Features

Oracle Fusion Service Logistics is a cloud solution under the Oracle Fusion Supply Chain Management Cloud offering. It's designed to help you run business processes that connect service request and field service dispatch flows to the supply chain.

There are three main users of the Service Logistics application.

- A field service administrator uses Service Logistics to supervise field service activities, review debrief transactions, post charges, order service parts, and manage the spare parts inventory at various stocking locations.
- A field service technician uses Service Logistics to manage their trunk stock, review the work orders assigned to them, and to create, update, and post field service debrief. A field service technician may also be assigned the privilege to order parts for work orders assigned to them.
- A depot repair manager uses Service Logistics to manage depot repair work orders and related charges.

When you first implement Service Logistics, your system administrator must create users and assign them the required roles and privileges.

Here are a few things you can do using Service Logistics:

- Order parts for:
  - service requests and service work orders (this includes generic work orders, Oracle Field Service Cloud work orders, and standalone work orders)
  - third-party service requests and third-party work orders
  - field parts stocking locations
- Receive parts into different types of stocking locations or warehouses.
- Transfer parts to various stocking locations.
- Return defective and unused or excess parts to the central or regional warehouse.
- Manage the repair and return of broken parts.
- Manage preventive maintenance of customer assets.
- Estimate charges for work orders before a service is provided and send the cost estimates to customers.
- Review and adjust charges for labor, parts, and expenses incurred on the service.
- Initiate billing for work orders.

Service Logistics interacts closely with Oracle Fusion Service. You can order parts for work orders and service requests created in Fusion Service using the Service Logistics pages. Service Logistics users can access the Fusion Service pages such as the Service Request Details and Work Order pages from within the Service Logistics application. This gives easy access to field service technicians and administrators to edit and update service request and work order details. Service technicians can open the Service Logistics Depot Repair Workbench from their Fusion Service application and track the repair order details.

Service Logistics also has an integration with Oracle Field Service Cloud to provide 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. Field service technicians can order and receive parts from Oracle Field Service Cloud using Service Logistics. 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.

## Setup Guidelines

To use Service Logistics, you must configure the following:

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 to ship parts to customers and create a return line for broken or defective parts.
5. Associate billing types with the service activity codes to filter the item list of values when a part is requested in order to complete a service request or work order.
6. Define return routing rules that will be used to route parts returned by customers, field service technicians, and field parts stocking locations to the appropriate warehouse or repair location.
7. Check the Service Logistics lookups that are referenced by service activity codes.
8. Set up the default values for the Service Logistics profile options. These values are used in the transfer order and sales order creation process.
9. Set up the parts search program that's used to search for parts automatically as well as interactively.

Your Service Logistics implementation also requires data to be set up in various supply chain management cloud applications. Here's a brief overview of the data that you will need. This is explained in detail in the *Getting Started with Service Logistics Implementation* guide.

- Set up your parts supply chain and the depot repair supply chain, for example, the organizations, subinventories, inventory sources, interorganization parameters, and so on.
- Set up labor, parts, and expense items in Oracle Product Master Data Management.
- Set up the Installed Base asset or maintenance asset tracking and define maintenance programs in Oracle Maintenance Cloud. This data is required to create preventive maintenance work orders.
- Set up service parts price lists and pricing strategy in Oracle Fusion Pricing.
- Set up service contracts discounts in Oracle Subscription Management Cloud.
- Set up order line types, orchestration processes, process assignment rules, and pre-transformation rules in Oracle Order Management Cloud. This data is required to execute shipment and return of parts and products from customers and bill for field service and depot repair services.
- Set up ATP rules and sourcing rules in Oracle Fusion Global Order Promising to find parts, determine shipping methods and carriers, and calculate the arrival date.

If you want to create part orders in Fusion Service, you must have the required roles and privileges. These features must be enabled at the service offering.

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

For information about setting up the integration with Oracle Field Service Cloud, see the *Integrating Service Logistics with Field Service* guide.

# Service Logistics Landing Page

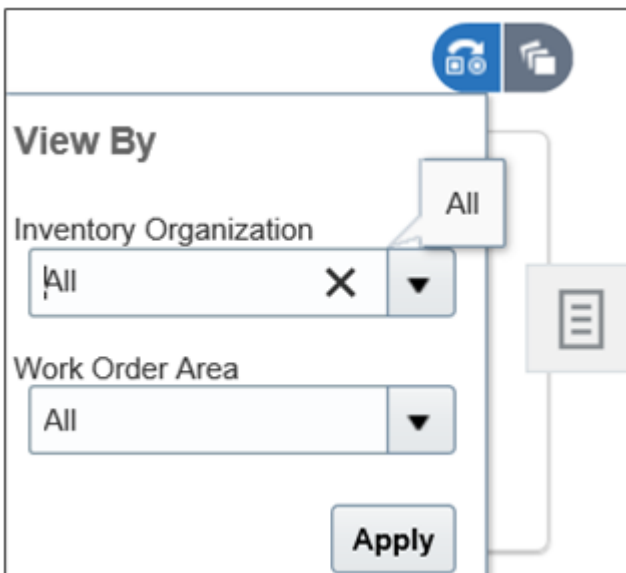
When you first access the Service Logistics application, you see the landing page. The Service Logistics landing page displays key metrics that help you review and complete tasks.

The landing page displays information based on the privileges assigned to a user role. Predefined job roles such as the Field Service Administrator, Depot Repair Manager, and Field Service Technician have corresponding privileges, which are used to create unique job roles. For example, a field service technician may not have access to view information that's available to a depot repair manager. In addition, you can use icons to filter the data that appears on your landing page.

## Service Logistics Landing Page Icons

Field service administrators and depot repair managers can use the **View By** icon to filter the landing page data by inventory organization and work order area.

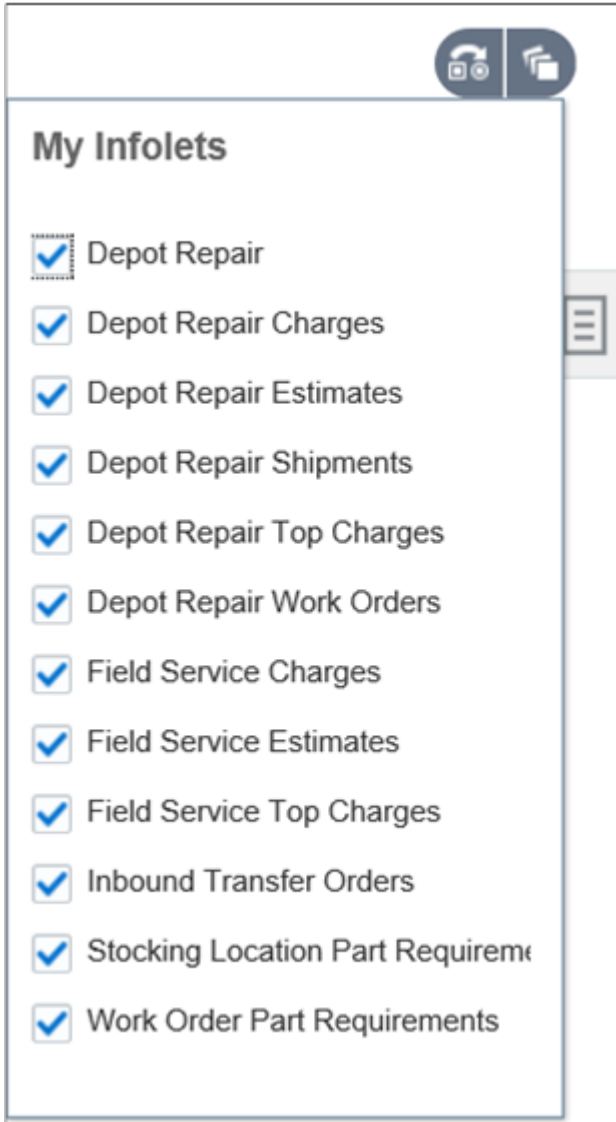
The following screenshot highlights the **View By** interface described in the table.



Fields	Description
Inventory Organization	Select All or a single inventory organization from the <b>Inventory Organization</b> LOV. If a user has: <ul style="list-style-type: none"> <li>Field Service Administration privileges, the inventory organizations set up in the Service Logistics Manage Stocking Location page appear.</li> <li>Depot Repair Manager privileges, the maintenance organizations appear.</li> <li>Both privileges, a combined list of the organizations appears.</li> </ul>
Work Order Area	Select All or a single work order area from the <b>Work Order Area</b> LOV.
Apply button	Click <b>Apply</b> to update the infolets with the filters you've selected.

Field service administrators and depot repair managers can select the **My Infolets** icon to show and hide infolets on the landing page, by selecting and deselecting an infolet's check box. The infolets that you see on this list are limited by your privileges.

The following screenshot shows the My Infolets interface. The infolets listed are described in the sections that follow.

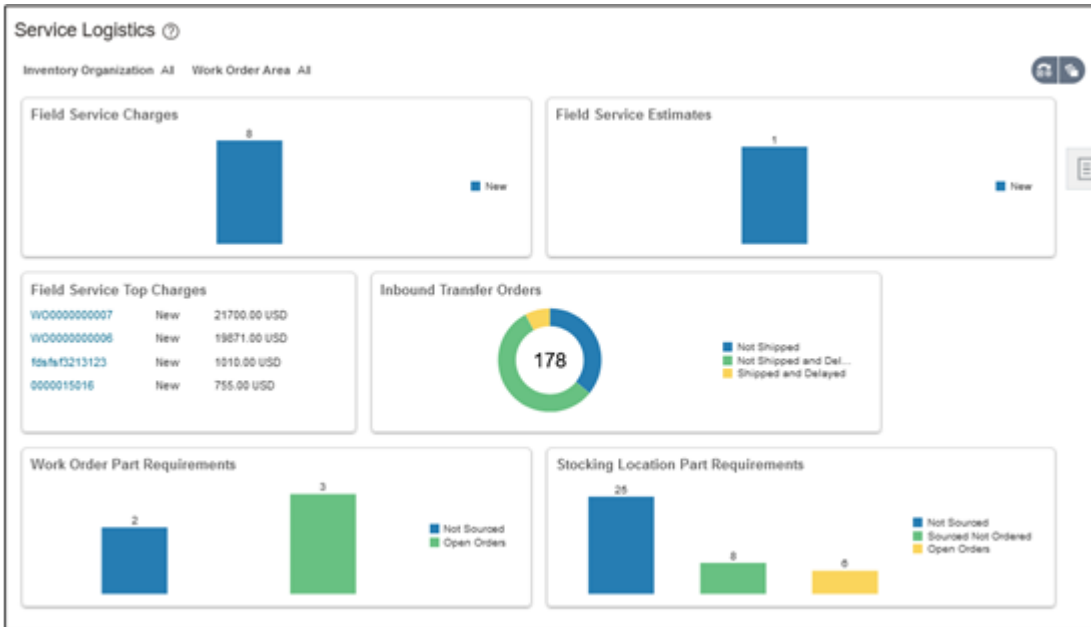


Let's have a look at how different users can use the landing page.

### **Service Logistics Landing Page for Field Service Administrators**

A field service administrator uses the landing page to view statistics on work order charges, work order cost estimates, and inbound transfer orders. These statistics provide the field service administrator with insights to support field service billing and field service parts management. Specifically, there are infolets to help you analyze your estimating and billing requirements and infolets to help you analyze your field parts inventory management.

Following is a screenshot of the landing page for field service administrators.



The following table describes the infolets and icons that the field service administrator sees on the landing page:

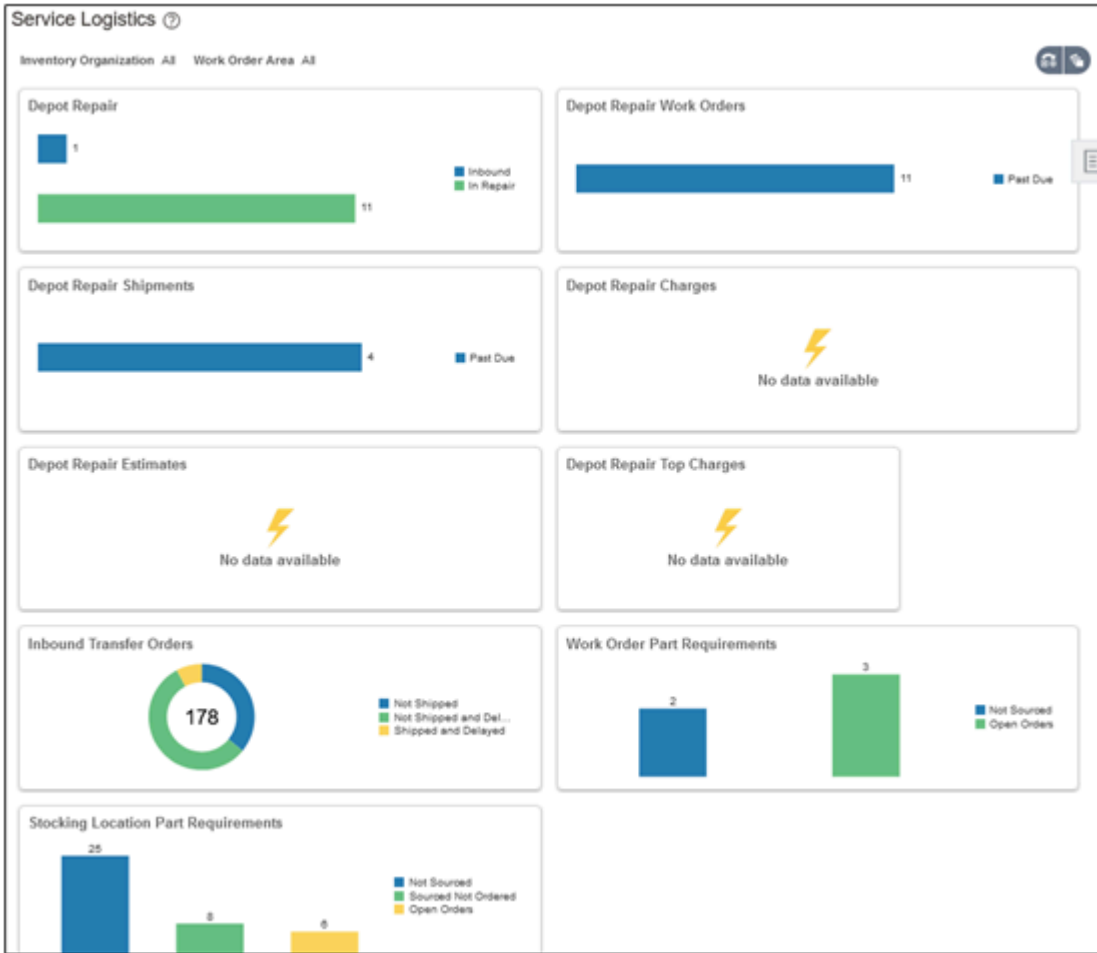
Infolet/Icon	Description
Field Service Charges	View simple statistics about field service debriefs, such as the number of debrief headers in New status, Needs Review status, and in Error status. Data filters by the work area. Click a number to go to the Manage Work Orders and Charges page and see a list of work orders in that status.
Field Service Estimates	View statistics on all estimates that are in status Pending Approval or New. Includes depot repair and field service estimates. You can filter by work area to view estimates for service work orders. Data filters by the inventory organization to view estimates for depot repair work orders. To filter, click the View By icon.
Field Service Charges by Status	See the total value of service charges for debrief lines that are in the New or Error status. Data filters by the 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 in that status.
Field Service Top Charges	View a list of work orders sorted in descending order of the total charge amount. The infolet displays the top 5 work orders. Data filters by the work area. Click on a work order number to go to the Manage Charges and Estimates page for that work order.
Inbound Transfer Orders	View statistics about inbound transfer orders based on status. For example, see the number of orders shipped and the number that aren't shipped. Also, the number of orders shipped but delayed and those that aren't shipped and are delayed. Data filters by the inventory organization.
Work Order Part Requirements	View a count of the open part requirements for all work orders assigned to the selected work area. Displays a count for part requirements that aren't sourced, part requirements that are sourced but not ordered, and part requirements with open orders.
Stocking Location Part Requirements	View a count of open part requirements destined for subinventories in the inventory organization selected on the landing page. Displays count for part requirements that aren't sourced, part requirements that are sourced but not ordered, and part requirements with open orders.

Infolet/Icon	Description
View By icon	<p>Click to choose a work area, an inventory organization, or both. This refreshes the screen and filters the data based on your selection.</p> <p>The values you choose filter the following infolets:</p> <ul style="list-style-type: none"> <li>• Field Service Charges</li> <li>• Field Service Charges by Status</li> <li>• Field Service Top Charges</li> <li>• Field Service Estimates</li> <li>• Work Order Part Requirements</li> </ul>
My Infolets icon	<p>Click to display a list of infolets available for this page. Hide or show infolets from view, by clicking the infolet's check box.</p>
Tasks icon	<p>Click to display the slide-out navigation panel. Use the navigation panel to access frequently performed activities. For example, go to the Manage Work Orders and Charges page, the Receive Parts page, or the Manage Field Parts Inventory page and so on.</p>

### Service Logistics Landing Page for Depot Repair Managers

Depot repair managers use the landing page for quick access to depot repair orders and shipments.

Following is a screenshot of the landing page for depot repair managers.



The following table describes the infolets and icons that the depot repair manager sees on the landing page:

Infolet/Icon	Description
Depot Repair	<p>View a bar chart displaying a count of depot repair work orders, RMAs, and shipment order lines for each depot repair lifecycle status. There is a non-extensible lookup (ORA_RCL_DEPOT_LIFE_STATUS) where you can define the depot repair lifecycle statuses that are visible on the landing page. Depot repair RMAs are return sales order lines that have an order line type tied to a depot repair logistics service activity code. Depot repair work orders are maintenance work orders associated to a depot repair RMA.</p> <p>The depot repair lifecycle statuses are:</p> <ul style="list-style-type: none"> <li><b>Inbound:</b> Incoming depot repair RMAs that have a fulfillment line in Awaiting Receiving status.</li> <li><b>Received:</b> Received depot repair RMA's sales order lines without an associated depot repair work order.</li> <li><b>In Repair:</b> Depot repair work orders in the Unreleased, Released, or On Hold status.</li> <li><b>To Be Shipped:</b> Depot repair work orders in the Canceled, Closed, or Completed status and an associated shipment sales order line's fulfillment that isn't in the Shipped or Billed status.</li> <li><b>To Be Billed:</b> Depot repair work orders in the Canceled, Closed, or Completed status and service charges for their associated depot repair RMA that haven't been created or posted.</li> </ul>

Infolet/Icon	Description
	<p><b>Shipped Not Billed:</b> Depot repair work orders in the Canceled, Closed, or Completed status and a sales order shipment line's fulfillment that's in the Awaiting Billing status.</p> <p>The counts in this infolet are filtered by the inventory organization that you select on the landing page filter. Click on any status in the bar chart to go to the Manage Depot Repair page that displays all of the RMAs tied to that status. For the repair work order drill downs, the number of RMAs on the Manage Depot Repair page won't match the count of work orders in the infolet when an RMA has more than one repair work order.</p>
Depot Repair Work Orders	View bar chart of counts for depot repair work orders in the Unreleased, Released, or On Hold status. They are grouped by the planned completion date. The three groups are Past Due, Due this Week, and Due beyond this week. If the planned completion date isn't specified, it falls into the Due this Week group. Data filters by the inventory organization on the repair work order. Click on any bar to open the Manage Depot Repair page. This infolet counts repair work orders, but the Manage Depot Repair page lists RMAs associated with these work orders. Since an RMA can have multiple work orders, the number of work orders shown in the infolet may not match the number of RMAs shown on the Manage Depot Repair page.
Depot Repair Shipments	View a bar chart with counts of repaired product shipment order lines grouped by the required fulfillment date. The three groups are Past Due, Due this Week, and Due beyond this week. If the required fulfillment date isn't specified, it falls into the Due this Week group. Data filters by the inventory organization of the shipment order line. Click on any bar to open the Manage Depot Repair page which displays the Depot Repair RMAs associated to these shipment sales order lines.
Depot Repair Charges	View counts of Depot Repair RMAs when charges in are in the New, Error, or Needs Review status. RMAs filter by the inventory organization selected for the landing page. Click on a number to open the Manage Depot Repair page to see the underlying RMAs.
Depot Repair Estimates	View a count of all estimates associated to Depot Repair RMAs that are in the Pending Approval or New status. RMAs filter by the inventory organization selected for the landing page. Click on a number to open the Manage Depot Repair page to see the underlying RMAs.
Depot Repair Top Charges	View a list of the top 5 depot repair RMAs sorted in descending order of their total charge amounts. RMAs filter by the inventory organization selected for the landing page. Click on an RMA number to open the Depot Repair Workbench.
Inbound Transfer Orders	View a pie chart of transfer orders in the Not Shipped, Not Shipped and Delayed, Shipped, and Shipped and Delayed status. Data filters by the transfer order destination inventory organization.
View By icon	<p>Click to choose a work area, an inventory organization, or both. This refreshes the screen and filters the data based on your selection.</p> <p>The values you choose filter the following infolets:</p> <ul style="list-style-type: none"> <li>• Depot Repair</li> <li>• Depot Repair Work Orders</li> <li>• Depot Repair Shipments</li> <li>• Depot Repair Charges</li> <li>• Depot Repair Estimates</li> <li>• Depot Repair Top Charges</li> <li>• Inbound Transfer Orders</li> </ul>
My Infolets icon	Click to display a list of infolets available for this page. Hide or show infolets from view, by clicking the infolet's check box.



Infolet/Icon	Description
Tasks icon	Click to display the slide-out navigation panel. Use the navigation panel to access frequently performed activities. For example, go to the Manage Work Orders and Charges page, the Receive Parts page, or the Manage Depot Repair page and so on.

### Service Logistics Landing Page for Field Service Technicians

Field service technicians use the landing page to quickly view the work orders and tasks assigned to them and take action.

Following is a screenshot of the landing page for field service technicians.



The following table describes the infolets and icons that the field service technician sees on the landing page.

Infolet/Icon	Description
Today's Work Orders	View a list of the current day's work orders. The infolet shows the scheduled start time, work order type, and work order address. Click on the scheduled time to open the work order in the Manage Charges and Estimates page.
Field Service Technician Work Order Charges	View the number of pending charges. This data is based on the debrief status. If debrief is entered and not posted, it will show up as New. If debrief is entered and there are errors while posting charges, it will show up under Error. The count of charges that must be reviewed by the field service administrator appears under Needs Review. Click on the number to quickly access the Manage Work Orders and Charges page.
Today's Work Orders by Status	A graph depicting the current day's progress, for example the number of work orders pending or completed. Click on the graph to access the Manage Work Orders and Charges page and query the orders based on their status.
Upcoming Work Orders	View of upcoming work orders by work order type.
Inbound Transfer Orders	View open transfer orders created for any work order assigned to the technician. Click to go to the Receive Parts page.
Tasks panel (not in screenshot)	Access the Manage Work Orders and Charges, Manage Field Parts Inventory, and Receive Parts pages.
My Infolets icon (not in screenshot)	Hide or show infolets from view.

Infolet/Icon	Description

# 2 Source and Order Service Parts

## Overview of Parts Ordering

Learn how you can use Service Logistics to source and order service parts.

You can use Service Logistics to:

- Order customer replaceable service parts and consumables.
- Approve, source, and 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.

You can create the following parts orders:

- **Sales Orders:** Created for parts-only service such as part exchanges, advanced exchanges, returns, and sales.
- **Transfer Orders:** Created to ship parts to support field service for a specific Fusion Service or third party work order, and for replenishing technician trunk stock and other field stocking locations.
- **Reservations:** Created to ensure that a part is reserved for a specific work order, when parts are sourced from field technician trunk stock as well as site-dedicated, and other unmanned stocking locations. A reserved part won't appear as available in a technician's trunk stock and can't be used for any other task.

What happens when a part requirement is created?

- A parts search program runs automatically to find the parts in the service supply chain, select the optimal shipping method, and calculate the estimated arrival date. For the parts search program to work, you must configure the Service Logistics lookups, `ORA_RCL_SOURCING_FS` (for Field Service) and `ORA_RCL_PART_SOURCING_CS` (for Customer Service). In these lookups, you must define the sourcing options that will be used for customer service (service request parts sales and exchanges) and field service (service work orders). You must also set up the sequence in which these sourcing options will be used to look for parts. The parts search program looks for parts until it finds a sourcing stocking location that has all of the parts. The search program then selects the lowest cost shipping method and uses it to calculate the arrival time and create the transfer or sales order.

If the search program doesn't return a result or returns a suboptimal stocking location, you can change the stocking location and shipping method in the Parts Search window. You can access the Parts Search window from the service request, work order, and part requirement pages. The Service Logistics parts search program also provides the option to use GOP and Inventory sourcing rules for parts search.

- A 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. Note that all discounts specified in the service contract for the customer and asset are applied before the price is calculated.

Let's understand a few more things about part requirements.

You can source the parts for a sales order shipment manually by selecting the source inventory organization and subinventory when you're adding the parts to the service request. The parts are manually sourced from the stocking location that you selected and not through the automatic parts search program. Manual sourcing is mostly used by service providers with simple supply chains. Note that manual sourcing is the only sourcing option available for depot repair shipments where the source is known when creating the shipment part requirement and the corresponding sales order shipment line.

Here's how you can create part requirements as a Service Logistics user:

In Service Logistics:

- Source and order parts for service requests and work orders using the Manage Part Requirements and Create Part Requirements pages. These are service requests, generic work orders, Oracle Field Service Cloud work orders, and standalone work orders coming from Fusion Service. Note that standalone work orders are work orders that aren't associated with service requests.
- Create part requirements for non-Fusion Service 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 page.

Note that field service technicians can create and manage part requirements only for service work orders and third-party work orders assigned to them. They can also create part requirements to replenish their trunk stock.

In Fusion Service:

- Order parts for service work orders and service requests in the Create Service Request and Create Work Order pages of the Fusion Service application. To do this, you must enable the required feature at the service offering. For instructions, see section Fusion Service in the Getting Started with Service Logistics Cloud Implementation guide.

You can create part requirements for all types of service work orders: generic, Oracle Field Service Cloud, and standalone.

**Note:** As a Service Logistics user, you can't edit the part requirements created in the Fusion Service pages. You can only edit and cancel these part requirements in Fusion Service.

From Oracle Field Service Cloud:

Field service technicians can also create part requirements from Oracle Field Service Cloud. This is facilitated through the integration between Service Logistics and Field Service Cloud.

## Order Parts Using Service Logistics

### Create Part Requirements

Use the Create Part Requirements page to order service parts to:

- Sell parts to customers.
- Exchange parts.
- Create a return material authorization.

- Order field service parts.
- Order parts for a third-party work order.

When you sell a part to a customer, you create a sales order. For all other item requirements, you create transfer orders, such as for field service or warehouse and technician stock replenishment.

### What happens when a transfer order is created?

- 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 customer invoice is generated for billing.

### How is the sales order fulfilled?

- Service Logistics integrates with Order Management 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 comes from Pricing. The amount charged to the customer is the sum of the shipping charges and the cost of the selected item. The final price includes all service contract discounts.

### How do you view the order details?

When you create the sales order or transfer order, the order number appears in the corresponding part requirement line. Click on the order number link to open the Order Details window and view the transfer order or sales order details. When the sales order contains multiple shipments, each shipment line appears in a separate row in the Order Details window.

**Parts Only Service:** You can order parts for service requests (Fusion Service and third party) when a customer can replace the defective part and a field service technician isn't 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.

There are two pre-defined businesses processes used for service activities that drive parts only service:

- **Customer Support:** Use service activities set up against this business process for simple parts sales and returns. The order and return lines are created separately.
- **Parts Exchange:** Use service activities set up against this business process for parts exchange. So when the user creates an order to return a defective or broken part, they can also create the corresponding shipment order line. This business process links the return and shipment lines so that Installed Base and subscription contracts can be updated when the broken product or part is received and when the repair or replacement is shipped.

**Field Service:** If you're a field service administrator, you can source and order parts required to complete a work order. You can order parts for the following types of work orders:

- **Generic Work Orders:** Used when there is no integration with any automated field service scheduling application or offline mobile field service to manage field service activities. Customers will enter the **Resolution Due** and **Requested** dates manually. They will also enter the Work Order Area manually instead of it being determined by an integration between Fusion Service and Field Service.
- **Oracle Field Service Cloud Work Orders:** Used when an integration exists between Fusion Service with Field Service to synchronize service work orders with activities in Field Service. When the work order is created in Fusion Service, it triggers the creation of a field service activity. The work order life cycle is managed using this integration.

- **Standalone Work Orders:** Used for work orders that aren't associated with a service request, such as, work orders created for simple installations or preventive maintenance.
- **Third-party Work Order:** Used for work orders from a legacy application.

If you're a field service technician, you can order parts for service work orders and third-party work orders that are assigned to you as well as order parts to replenish your trunk stock. Some field service technicians may only have access to create part requirements for certain field stocking locations but not initiate the sales or transfer order for those part requirements. These part requirements must first be approved by the field service administrator or parts coordinator. Field service technicians in this scenario don't have the Allow Part Orders privilege assigned to them.

Service Logistics provides one seeded business process to drive field service.

**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.

### Create Part Requirements Page

Let's look at the table that follows to understand the fields in the header region of the Create Part Requirements page.

#### Create Part Requirements Page - Header Field Descriptions

Attribute	Description
Document Type	<p>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 has the following document types seeded:</p> <ul style="list-style-type: none"> <li>• <b>Service Request</b></li> <li>• <b>Service Work Order</b></li> <li>• <b>Replenish Trunk Stock</b></li> <li>• <b>Replenish Warehouse</b></li> </ul> <p>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.</p> <p>The <b>Service Work Order</b> document type is used for generic work orders, Oracle Field Service Cloud work orders, and standalone work orders.</p> <p>The rest of the fields in the header are disabled or enabled and required or optional based on the document type selected. The document types <b>Service Request</b> and <b>Replenish Warehouse</b> aren't available to field service technicians.</p>
Document Number	<p>Numeric identifier for the service request or work order for which you're creating the part requirement.</p> <ul style="list-style-type: none"> <li>• For a service request created in Fusion Service, you must select from the list of values that shows all the SRs (with a customer party) for which a part requirement line hasn't been created and where the SR status type isn't <b>Closed</b> or <b>Resolved</b>.</li> <li>• For work orders created in Fusion Service, select from the list of values that shows all the non-canceled work orders for which a part requirement line hasn't been created. The work order must have an associated service request with a customer party. The list of values also includes the standalone work orders.</li> <li>• For a third-party or customer defined document type, you manually enter the document number in an editable text field.</li> <li>• This field is disabled for the parts replenishment document types.</li> </ul> <p>Field service technicians will only see the work orders assigned to them in the Document Number list of values. Note that other fields in the header region are automatically populated with details derived</p>

Attribute	Description
	<p>from the document number selected. When the document type is a work order, the values default from the work order.</p>
Ship-to Address Type	<p>Drop-down list shows the following values:</p> <ul style="list-style-type: none"> <li>• <b>Customer</b> when the document type is <b>Service Request</b> or <b>Service Work Order</b>.</li> <li>• <b>Customer</b>, <b>Technician</b>, and <b>Warehouse</b> when the document type is <b>Service Work Order</b>.</li> <li>• <b>Technician</b> when document type is <b>Replenish Trunk Stock</b>.</li> <li>• <b>Warehouse</b> when document type is <b>Replenish Warehouse</b>.</li> <li>• No default value for customer defined document types.</li> </ul>
Customer	<p>Customer for whom the order is created. Value is required when the ship-to address type is <b>Customer</b>. It defaults from the service request selected. For service work orders, it defaults from the work order.</p> <p>When document type is customer defined, user can select from the list of values available.</p>
Technician	<p>Required when document type is <b>Replenish Technician Trunk Stock</b>. List of values includes TCA Party Names where:</p> <ul style="list-style-type: none"> <li>• the Party_Type is equal to <b>Person</b>,</li> <li>• Usage Code is equal to <b>Field Service Technician</b>, and;</li> <li>• party has a TCA address.</li> </ul> <p>When the document type is <b>Service Work Order</b> and the work order has a technician assigned, the technician name defaults in this field.</p> <p>The technician name also defaults when the user accessing the page is a field service technician.</p>
Business Unit	<p>Unit in which the order is requested. For service requests and work orders coming from Fusion Service, the value is derived from the service request or work order selected. For customer defined document types and for the <b>Replenish Warehouse</b> document type, users can select from the available list of values.</p> <p>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.</p>
Ship-to Address	<p>Field can be edited only when the Ship-to Address Type is <b>Customer</b>, <b>Technician</b>, or <b>Warehouse</b>. If the address type is <b>Customer</b>, LOV displays all of the ship-to party site addresses for the selected customer party. If the address type is <b>Technician</b>, LOV displays the ship-to party site addresses of the technician selected. When the address type is <b>Warehouse</b>, the <b>Ship-to Address</b> field is disabled and the default warehouse's address is displayed.</p>
Ship-to Customer	<p>LOV used to select a different customer than the one entered for the document type. This is an optional field used to ship parts to a customer address that is different from the service request.</p> <p>When parts requirements are created in Service Logistics, this field appears in the header for the following document types:</p> <ul style="list-style-type: none"> <li>• <b>Service Request</b></li> <li>• <b>Service Work Order</b>, with the ship-to address type, <b>Customer</b></li> <li>• <b>Third-party Work Order</b>, with the ship-to address type, <b>Customer</b></li> </ul>

Attribute	Description
	<b>Note:</b> When you select a different customer, the <b>Ship-to Address</b> field defaults to the ship-to customer's address.
Need By	Date by which the parts are required. For service requests and work orders coming from Fusion Service, the default date is derived from the service request or work order selected.
Destination Organization	List of values includes all organizations modeled as inventory organizations and with at least one subinventory set up in the Manage Stocking Locations page.  The destination organization list of values for the field service technician is restricted to the organizations in which the login technician has stocking locations assigned.  The default destination organization for warehouse is the inventory organization assigned to the work order's work area.
Destination Subinventory	Subinventories set up under the selected destination organization and set up in the Service Logistics Manage Stocking Locations page.
Bill-to Customer	The default service request customer party. This field is enabled when the document type is from a third party object or when you select a service request as document number.
Bill-to Account	The default account from the bill-to customer, if there is only one account. If there is more than one account, then select an account from the LOV.
Bill-to Address	The default address from the bill-to account's primary bill-to address.
Purchase Order	The purchase order from the Debrief header or part requirement.

### Related Topics

- [Source Parts Using Service Logistics Parts Search](#)
- [Cancel Parts Orders](#)
- [Sell Parts to Customers](#)
- [Exchange Parts](#)
- [Create a Return Material Authorization \(RMA\)](#)
- [Order Field Service Parts](#)
- [Order Parts for a Third-Party Work Order](#)

## Sell Parts to Customers

You can create a sales order for a replacement part for a customer.

In this case, a call center agent sells a part to the customer. The service request completes after the replacement part ships to the customer.

1. In the Create Part Requirements page, select **Service Request** in the **Document Type** field.



2. Select the service request number from the list of values in the **Document Number** field. **Ship-to Address Type** defaults as **Customer** and the **Ship-to Address** is the customer address derived from the **Ship-to Customer** field. Fields that aren't required are disabled.
3. Add parts to the service request. Click on the Add Part (+) button to go to the Add Part window. Here you will select the item that you want to order to replace the defective part. Note the following about the fields in this page.

Attribute	Value
Service Activity	Service activities whose billing type is linked to the billing category <b>Material</b> and the business process is <b>Customer Support</b> .
Item	<p>The items are filtered based on the service activity and billing type association in the Manage Service Activities page.</p> <p>Items must have the following attributes:</p> <ul style="list-style-type: none"> <li>○ Item Organization = Default Inventory Org profile (INV_DEFAULT_ORG_ID)</li> <li>○ Stock enabled = Yes</li> <li>○ Transactions enabled = Yes</li> <li>○ Customer Orderable = Yes</li> <li>○ Must be assigned a billing type tied to the billing category Material (Manage Billing Types page)</li> </ul>
Revision	Revision values of selected item. Enabled only if the item is revision controlled.
Ship-to Address Type	Customer
Ship-to Customer	<p>LOV used to select a different customer than the one entered for the document type. This is an optional field used to ship parts to a customer address that is different from the service request.</p> <p><b>Note:</b> When you select a different customer, the <b>Ship-to Address</b> field defaults to the ship-to customer's address.</p>
Ship-to Address	Defaults to the primary ship-to address of the customer party.
Source Organization	List of values includes all inventory organizations where the item is defined. This is an optional field. Select a source organization only when you want to manually source the part instead of letting the automatic parts search program find the required parts.
Source Subinventory	Field is enabled when a source organization is selected. List of values includes all enabled subinventories of type Storage for the selected source organization.
Return-from Customer	List of values includes valid customers and is the same as the existing bill-to customers.

Attribute	Value
	<p>Use this field to change the return-from customer.</p> <p>Create sales orders using the sold-to customer to identify where the part is physically located. This is the customer or organization who is returning the item. You can use the same customer and address information for tax credit calculations.</p>
Return-from Address	<p>The list of values includes the ship-to party addresses related to the customer selected in the <b>Return-from Customer</b> field.</p>

4. If you want to source the part manually, check that you have selected the source organization and subinventory in the Add Part window.
  - a. The following fields are enabled:
    - Requested Ship Date = You may enter a date and time to request the shipment.
    - Shipping Method = You can select a shipping method from the list of values. LOV shows the shipping methods that are defined for the selected source inventory organization in the Manage Carriers page of the Manufacturing and Supply Chain Materials Management application.
  - b. The item will be sourced from the selected inventory organization.
  - c. The automatic parts search program won't run.
  - d. An estimated arrival time isn't passed to Order Management.
5. Click **Add** after you have entered all the item details. A requirement line is created in the main page.
6. The stocking location and shipping details are identified automatically by the parts search program which will look for parts in the order defined in the Customer Support parts search lookup (ORA\_RCL\_PART\_SOURCING\_CS). Automated sourcing (using the parts search program) is the default sourcing option unless you have specified the source organization and subinventory details in the Add Part window.
7. To select an alternative stocking location, when you're not happy with the option provided by automated search, use the Parts Search window.
  - a. Click on the search icon next to the Stocking Location value.
  - b. In the Parts Search window, select the alternative sourcing options that you want to use. Pick your desired stocking location from the search results returned by the parts search program. Save and close the window. The part requirement line will be updated with the new stocking location, arrival date, and ship method. In the Parts Search window, you may enter a different need-by date than the date in the Add Part window. This lets you search for parts in optimal stocking locations at a later date if the desired part isn't found on the original need-by date or the search has returned suboptimal stocking locations. To learn more about using this interactive search window, see the section on the Parts Search window.
8. The part price that's returned by Pricing appears under the **Your Price** column in the requirement line. Sometimes you may need to adjust the price. For example, you may need to correct price errors or discrepancies that may arise when the initial price returned from Pricing is different from the price promised to the customer. This ensures that customers are billed accurately. To adjust the price, click on the pencil icon next to the Your Price value and open the Edit Price dialog box.
9. In the **Edit Price** dialog box, the price is adjusted according to the adjustment type you choose and the amount you enter. Use the following information to edit the price.
  - a. Select the adjustment type. Here are the adjustments that you can make:
    - **Discount Percent**

- **Discount Amount**
  - **Markup Amount**
  - **Markup Percent**
  - **Price Override**
- b. Enter the adjusted price amount.
  - c. Select the basis or the price element. This is the pricing entity used to calculate the price for example the list price or net price.
  - d. Select a reason for the adjustment. Seeded values include **Price match**, **Sales negotiation**, **Error correction**, and **Other**. You can add your own custom adjustment reasons while setting up Service Logistics.
  - e. Click **Save and Close** to save the adjustment line and close the dialog box. You can add multiple adjustment entries for a single line item. When there are multiple line entries, the price is adjusted as per the sequence of the entries.
  - f. You can also delete an entry that's not required.
10. To see the adjustment and other pricing component details applied to the total price, click the highlighted price amount. After the part is priced, subscription adjustments are applied to get the final charge amount.
  11. You can add more parts using steps 1 to 5. When you have added all the parts that you require, click **Order** to create a sales order. The sales order is created in the **Submitted** status with the order and order line types defined in the selected Service Activity Code. The order line type is typically used to assign the correct DOO Orchestration Process.

## Exchange Parts

You can order customer replaceable parts and return broken parts.

In this case, a service request exists for a customer issue. The field service administrator creates a return material authorization for the defective or broken part that the customer wants to return. In the same window, they create the shipment order line for the replacement part. The return and shipment part requirement lines are created and linked for downstream processing.

1. In the Create Requirement page, select **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 **Ship-to Address** is the customer address derived from the **Ship-to Customer** field.
3. Click on the Add Part (+) button to go to the Add Part window.
4. Select a return service activity code for business process **Parts Exchange**. The Add Part window is refreshed to display fields that you must enter to create the return order line as well as fields that you must enter to create the corresponding shipment order line. Use the table for information on the fields.

Attribute	Value
Service Activity	<p>Service Activities whose billing type is linked to the billing category <b>Material</b> and the business process is <b>Parts Exchange</b>. Select a return service activity code.</p> <p>The service activity code (SAC) will determine the order line type used to create return and shipment order lines. Service activity codes are set up by your system administrator in the Manage Service Activities setup page.</p>

Attribute	Value
Item	<p>The defective or broken part that must be returned.</p> <p>The items are filtered based on the service activity and billing type association in the Manage Service Activities page. List of values includes items assigned to the selected destination organization.</p> <p>Items must have the following attributes:</p> <ul style="list-style-type: none"> <li>○ Item Organization = Default Inventory Org profile (INV_DEFAULT_ORG_ID)</li> <li>○ Stock enabled = Yes</li> <li>○ Transactions enabled = Yes</li> <li>○ Returnable = Yes</li> <li>○ Must be assigned a billing type tied to the billing category Material (Manage Billing Types page)</li> </ul>
Revision	Revision values of selected item. Enabled only if the item is revision controlled.
Return Reason	List of values derived from the Return Cancel and Change Reason lookup.
Destination Organization	This is the default return organization.
Destination Subinventory	Select a subinventory in the return organization if required.
Destination Address	Address of the destination organization or subinventory if entered.
Asset	<p>Select the asset or serial number of the broken part or product being returned so that the Installed Base can be updated when it's received and when the replacement part is shipped. List of values includes the asset on the service request as well as all the assets that are components of the asset specified on the service request. If there is no asset specified on the service request, list of values shows assets:</p> <ul style="list-style-type: none"> <li>○ associated to the service request customer party</li> <li>○ which have the Maintainable attribute set to Yes</li> <li>○ where the asset item matches the item number of the part being returned</li> </ul> <p>For nonserialized asset tracked items, you must select an asset in the <b>Asset</b> field.</p>
Shipment Service Activity	Service Activities whose billing type is linked to the billing category <b>Material</b> and the business process is <b>Parts Exchange</b> . Value defaults to the first shipment service activity code that you have defined in the <b>Parts Exchange</b> business process.

Attribute	Value
Shipment Item	<p>Replacement item that will be shipped to the customer. Defaults from the RMA item. The items are filtered based on the service activity and billing type association in the Manage Service Activities page. List of values includes items assigned to the selected destination organization.</p> <p>Items must have the following attributes:</p> <ul style="list-style-type: none"> <li>○ Item Organization = Default Inventory Org profile (INV_DEFAULT_ORG_ID)</li> <li>○ Stock enabled = Yes</li> <li>○ Transactions enabled = Yes</li> <li>○ Customer Orderable = Yes</li> <li>○ Must be assigned a billing type tied to the billing category Material</li> </ul>
Need By	Select from the date picker.
Ship-to Address Type	Customer
Ship-to Customer	<p>LOV used to select a different customer than the one entered for the document type. This is an optional field used to ship parts to a customer address that is different from the service request.</p> <p><b>Note:</b> When you select a different customer, the <b>Ship-to Address</b> field defaults to the ship-to customer's address.</p>
Ship-to Address	Defaults to the primary ship-to address of the customer party.
Source Organization	Defaults from the RMA's destination organization.
Source Subinventory	Field is enabled when a source organization is selected. List of values include all enabled subinventories of type <b>Storage</b> for the selected source organization.
Return-from Customer	<p>List of values includes valid customers and is the same as the existing bill-to customers.</p> <p>Use this field to change the return-from customer.</p> <p>Create sales orders using the sold-to customer to identify where the part is physically located. This is the customer or organization who is returning the item. You can use the same customer and address information for tax credit calculations.</p>
Return-from Address	The list of values includes the ship-to party addresses related to the customer selected in the <b>Return-from Customer</b> field.

5. Click **Add**. Two part requirement lines are created, and the shipment line is automatically sourced.

6. The **Your Price** column will display the price returned for the item from the Pricing application. Here's how the price is calculated. The list price is obtained from Pricing and after subtracting the contract and warranty coverage discounts, the final price is displayed. Note that the price can be forced to be Zero if the SAC has the Zero Price attribute.

You can adjust the price by clicking on the pencil icon next to the Your Price value. You will see the Edit Price dialog box.

7. In the **Edit Price** dialog box, the price is adjusted according to the adjustment type you choose and the amount you enter. Use the following information to edit the price.
  - a. Select the adjustment type. Here are the adjustments that you can make:
    - **Discount Percent**
    - **Discount Amount**
    - **Markup Amount**
    - **Markup Percent**
    - **Price Override**
  - b. Enter the adjusted price amount.
  - c. Select the basis or the price element. This is the pricing entity used to calculate the price for example the list price or net price.
  - d. Select a reason for the adjustment. Seeded values include **Price match**, **Sales negotiation**, **Error correction**, and **Other**. You can add your own custom adjustment reasons while setting up Service Logistics.
  - e. Click **Save and Close** to save the adjustment line and close the dialog box. You can add multiple adjustment entries for a single line item. When there are multiple line entries, the price is adjusted as per the sequence of the entries.
  - f. You can also delete an entry that's not required.
8. A stocking location is automatically identified for the spare part using automated parts sourcing (unless you have opted to manually source the parts). If you want to change the stocking location, click on the search icon next to the Stocking Location value to open the Parts Search window. Here you can select an alternative stocking location using the various sourcing options. You can also search for part availability at a later date if the desired part isn't found by the current need-by date. See related link to understand how to use this interactive parts search window.
9. Click **Order** when you have finalized the requirement lines. This creates two sales order lines, one for the return and one for the shipment. In addition, the relationship between these sales orders lines is recorded so that asset tracking, subscriptions, and warranties can be updated when the broken part is received and the new part is shipped.

## Create a Return Material Authorization (RMA)

You can create a return material authorization (RMA) for a defective part:

In this case, a customer returns the defective or broken part. The field service administrator must capture the details of this part by creating an RMA for the defective or broken part.

1. Follow the same process as you would to order a new customer replaceable part.

2. In the Add Part window, select a service activity code that has been set up for customer service returns (business process - Customer Support). 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:

Attribute	Value
Item	<p>Items assigned to the selected destination organization. Items must have the following attributes set up in the Item Master:</p> <ul style="list-style-type: none"> <li>○ Material billable = M</li> <li>○ Stock enabled = Yes</li> <li>○ Transactions enabled = Yes</li> <li>○ Returnable = Yes</li> <li>○ Must be assigned a billing type tied to the billing category Material</li> </ul>
Return Reason	Select from the list of values derived from lookup type DOO_RETURN_REASON.
Destination Organization	Value set for the profile option: Default Return Organization.
Destination Subinventory	Subinventories of the selected inventory organization.
Ship-to Address Type	Customer
Ship-to Customer	<p>LOV used to select a different customer than the one entered for the document type. This is an optional field used to ship parts to a customer address that is different from the service request.</p> <p><b>Note:</b> When you select a different customer, the <b>Ship-to Address</b> field defaults to the ship-to customer's address.</p>
Ship-to Address	Defaults to the primary ship-to address of the customer party.
Return-from Customer	<p>List of values includes valid customers and is the same as the existing bill-to customers.</p> <p>Use this field to change the return-from customer.</p> <p>Create sales orders using the sold-to customer to identify where the part is physically located. This is the customer or organization who is returning the item. You can use the same customer and address information for tax credit calculations.</p>
Return-from Address	The list of values includes the ship-to party addresses related to the customer selected in the <b>Return-from Customer</b> field.

- Return to the main page (Create Part Requirement page) and click **Order**. This creates the RMA. The sales order is created in the **Submitted** status with the order and order line types defined in the selected Service Activity Code. The order line type is typically used to assign the correct DOO Orchestration Process.

## Order Field Service Parts

You can create a order for a field service technician.

### Order field service parts:

In this case, a customer reports a defect. A field service technician must visit the customer to fix the issue. The field service administrator creates an order for the service parts that the field service technician needs to complete a work order.

Use this process to also order parts for standalone work orders.

If you're a field service technician, you can use this feature to order parts for work orders assigned to you.

- In the Create Requirement page, select **Service Work Order** in the **Document Type** field.
- Select the work order number from the list of values in the **Document Number** field. The ship-to address is automatically populated based on the work order details.
- In the **Ship-to Address Type** field, choose one of the following:
  - Customer: To ship the parts to the customer address. This is the default selection and the ship-to address is automatically populated based on the work order details.
  - Technician: To ship the parts to the field service technician's address.
  - Warehouse: To ship the parts to a field stocking location. This allows field service technicians to pick up parts at the district office stockroom, a drop box, or another stocking location.
- Click on the Add Part (+) button to go to the Add Part window. Enter the item details and use information from the table below to enter other details.

Attribute	Value
Item	<p>Items assigned to the selected destination organization.</p> <p>Items must have the following attributes set up in the Item Master:</p> <ul style="list-style-type: none"> <li>Must be valid for the destination organization. If there is no destination organization, it must be assigned to the organization set up in the Default Inventory Org profile (INV_DEFAULT_ORG_ID)</li> <li>Stock enabled = Yes</li> <li>Transactions enabled = Yes</li> <li>Internal Orderable = Yes</li> <li>Must be assigned a billing type tied to the billing category Material (Manage Billing Types page)</li> </ul>
Ship-to Address Type	Customer, Technician, or Warehouse. (Technician only displayed when the work order has a Technician Party assigned). The customer name defaults from the work order.
Ship-to Address	If the address type is <b>Customer</b> , the shipping address defaults from the customer's address on the work order. If the address type is <b>Technician</b> , the address type defaults to the primary



Attribute	Value
	address of the selected technician (Party Site) as set up in MDM Person page. When address type is <b>Warehouse</b> , the <b>Ship-to Address</b> field is disabled and the default warehouse's address is displayed.
Destination Organization	<p>Inventory organizations with at least one subinventory set up in the Manage Stocking Locations page.</p> <ul style="list-style-type: none"> <li>○ Defaults to the field service technician's default stocking location inventory organization if work order has technician assigned.</li> <li>○ Defaults to the work area's default field service inventory organization if work area is defined on the work order but no technician has been assigned to the work order.</li> <li>○ Defaults from the default destination organization defined in the profile RCL_DEF_DESTINATION_ORGANIZATION when no technician or work area is found on the work order.</li> </ul>
Destination Subinventory	Subinventories of the selected inventory organization. For shipments, they must also be set up in the Manage Field Parts Inventory page.

5. Return to the main page (Create Part Requirements page).
6. The parts search program runs automatically to source the required parts based on the order defined in the Field Service parts search lookup (ORA\_RCL\_PART\_SOURCING\_FS). When automated parts search is unable to find the part or returns a stocking location that's not satisfactory, you can select an alternative stocking location. Click on the search icon next to the Stocking Location value to access the Parts Search window.
7. Select the check boxes in the top of the window to use alternative sourcing options. Pick the desired stocking location from the search results returned by the parts search program. If the part isn't found in an optimal stocking location, enter a different need-by date and resume your search. Save your record. See the section on the Parts Search window to understand how the sourcing options are filtered for field service.
8. Click **Order** after you have added the parts. This creates a transfer order. If the parts are sourced from the field service technician trunk stock, a site-dedicated stocking location, or an unmanned field stocking location, a reservation is created. If the parts are sourced from a manned warehouse, a transfer order is created.

## Order Parts for a Third-Party Work Order

You can order parts for a third-party work order.

In this case, the work orders come from a third-party or legacy system. All the fields in the header region of the Create Part Requirement page are enabled. The field service administrator 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 service work orders.

## Replenish Technician Trunk Stock

You can order parts to replenish the trunk stock inventory of the field service technicians.

To order 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 page. You won't 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. The list of values displays all the field service technicians that have the following:
  - o Party Type of the employee should be Person in TCA Parties.
  - o Usage Code is Field Service Technician. The usage code is automatically assigned to the person party when a stocking location is first assigned to the technician in the Manage Field Service Technicians page.
  - o Ship-To site is defined for the technician in the Manage Customers page and an address is added to that Ship-To site.
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**.
  - o If the parts are sourced from the field service technician trunk stock, a site-dedicated stocking location, or an unmanned field stocking location, a reservation is created.
  - o If the parts are sourced from a manned warehouse, a transfer order is created.

## Replenish Warehouse

You can order parts to replenish the field service parts stocking locations.

To order parts to replenish the field service parts stocking locations:

1. Select **Replenish Warehouse** as your **Document Type** in the Create Part Requirement page. Document Number isn't 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 window and select the item.
4. Click **Add**, return to the main page and then select **Order**. Transfer orders are created for parts sourced from manned locations. Reservations are created for parts sourced from technicians, trunk stock, or unmanned locations.

## Order Parts Using Fusion Service

### Order Parts for Sale, Return, and Exchange

You can create part orders to ship parts to customers.

1. Click **Service Requests** on the Navigator to go to the Service Requests page. Query your service request.
2. Click on the service request to go to the service request details page.
3. Click on the **Parts** tab.
4. In the Parts tab, click the Add Part (+) button to go to the Add Part window.
5. In 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. See note on service activities below.
  - b. Select the item.
  - c. Enter the quantity and need-by date.

- d. Select the customer address.
      - e. Select a source organization and source subinventory for your part shipment lines if you want the part to be sourced from a specific inventory organization and subinventory. In this case the parts won't be sourced automatically through the parts search program. Note that no shipping method or estimated arrival time will be passed on to Order Management.
6. Click **Add**. A part requirement line is created.
7. In most cases, you will use automated sourcing where the parts search program will automatically look for the required part based on the order defined in the Customer Support parts search lookup (ORA\_RCL\_PART\_SOURCING\_CS). However, if you're not satisfied with the options returned (if the source returned is a suboptimal location or the source can't be automatically identified), you can select an alternative stocking location. To do so, click on the search icon next to the Stocking Location value in the part requirement line. The Parts Search window opens.
8. Select the check boxes to enable the sourcing options that you want to use. Select the desired stocking location from the search results. The part requirement will be updated with the new source stocking location, arrival date and ship method. See the section on the Parts Search window for more information.
9. In the Parts Search window, you also have the option to enter a new Need By date if the requested part isn't available on the original need-by date selected in the Add Part window.
10. The price of the item displayed in the Your Price column is the initial price returned from Oracle Pricing Cloud. Your Price includes contract and warranty coverage discounts as well as prices from Pricing. You can adjust the price by clicking on the pencil icon next to the Your Price value. This will open up the **Edit Price** dialog box.
11. In the **Edit Price** dialog box, the price is adjusted according to the adjustment type you choose and the amount you enter. Use the following information to edit the price.
  - a. Select the adjustment type. Here are the adjustments that you can make:
    - Discount Percent
    - Discount Amount
    - Markup Amount
    - Markup Percent
    - Price Override
  - b. Enter the adjusted price amount.
  - c. Select the basis or the price element. This is the pricing entity used to calculate the price for example the list price or net price.
  - d. Select a reason for the adjustment. Seeded values include Price match, Sales negotiation, Error correction, and Other. You can add your own custom adjustment reasons while setting up Service Logistics.
  - e. Click Save and Close to save the adjustment line and close the dialog box. You can add multiple adjustment entries for a single line item. When there are multiple line entries, the price is adjusted as per the sequence of the entries.
  - f. You can also delete an entry that's not required.
12. Manual adjustment of the price of spare parts lets you correct any pricing error or discrepancy and bill the customer accurately. To see the adjusted price and another price components, click on the highlighted price amount. You can also see the discounts, if any, that have been applied to the price.
13. After adding all the required parts, click **Order**. A sales order is created to ship the required part to the customer and generate an invoice for the same.
14. Click on the order number to view the sales order details.
15. Click on the item to view the source warehouse and shipping details.

**Note:** Use this information to select the service activity:

- Service activity codes tied to the business process Parts Exchange: Select to create the RMA for the defective part and the corresponding shipment order for the replacement part simultaneously. When you select this service activity, the Add Part window displays fields to create the RMA as well as the shipment order. The processes are linked for downstream processing. Both requirement lines are created at the same time.
- Service activity codes tied to the business process Customer Support: Select when you want to execute a simple parts sales or return. The Add Part window will display fields either for an order line or return line depending on your choice. If you have created an order line for a replaceable part, you can add a return line to the same service request. You must go back to the Parts tab and click on the Add Part button again to create the RMA.

#### Related Topics

- [Manage Backorders](#)
- [Cancel Parts Orders](#)

## Order Parts for Field Service

Use this process to order service parts for service work orders: Generic, Oracle Field Service Cloud, and standalone.

These work orders are created either in the standalone Work Order page or through the Create Work Order option in the Service Request page.

1. Open the work order for which you want to order parts.
2. Click on the **Part Details** tab.
3. Click on the Add Part (+) button to access the Add Part window.
4. Select the item.
5. Enter the quantity, need-by date, and ship-to address. You can select a technician's address, or a customer's address, or a warehouse to ship the item to. If the **Ship-to Address Type** is **Customer**, the shipping address defaults to the customer's primary ship-to address. If the **Ship-to Address Type** is **Technician**, the address type defaults to the primary address of the selected technician (Party Site) as set up in MDM Person page. When **Ship-to Address Type** is **Warehouse**, the default destination subinventory is displayed. If no default subinventory has been defined, then the default destination organization is displayed.
6. Click **Add**.
7. The parts search program will run automatically to source the required parts based on the order defined in the Field Service parts search lookup (ORA\_RCL\_PART\_SOURCING\_FS). Note that you can change the stocking location if you find it unsatisfactory. Click on the search icon next to the Stocking Location value to access the Parts Search window.
8. The check boxes on the top of this window indicate alternative sourcing methods. Enable your choices. Pick the desired stocking location from the search results returned by the parts search program. Save your record. See the section on the Parts Search window to understand how the sourcing options are filtered for field service.
9. On the Work Order Part Details tab, click **Save**. A transfer order is created for the selected item.

#### Related Topics

- [Source Parts Using Service Logistics Parts Search](#)
- [Manage Backorders](#)


## Source Parts Using Service Logistics Parts Search

The Parts Search window is an interactive search window that uses the Service Logistics parts search program to display alternative sourcing options for spare parts.

When adding a part requirement to a service request or work order in the Add Part window, the parts search program returns a stocking location based on the program configuration. If you're dissatisfied with the returned stocking location or the program doesn't return a source, use the Parts Search window for selecting alternative stocking locations and shipping methods.

**Note:** Configuring the parts search program in Service Logistics is essential to using both the automated parts search as well as the interactive search in the Parts Search window. See related link.

You can access the Parts Search window from Fusion Service (Service Request and Work Order pages) as well as Service Logistics (Create and Manage Part Requirement pages). Create a part requirement to perform an automated parts search. The automated search program might not always find the requested part. Click on the search icon next to the **Stocking Location** value to open the Parts Search window and use alternative sourcing options.

Address Type	Shipping Address	Stocking Location
Customer	1111 14th st/DENVER, CO 80202	M3. 

This opens the Parts Search window.

Item	Quantity	UOM	Type	Stocking Location	Shipping Method	Expected Arrival	Shipping Cost
RCL_ASS4888	100	Each	Site Dedicated ...	FST.FST_SDS	--	19/10/22 11:56 PM	0
RCL_ASS4888	100	Each	Unmanned War...	FST.FST_UNMAN	Federal Express-Air-FedEx 2day	21/10/22 11:56 PM	10
⊞ RCL_FSS4888	100	Each	Technician	FST.FS_Truck6	Federal Express-Air-FedEx 2day	21/10/22 11:56 PM	10
RCL_ASS4888	90	Each	Technician	FST.FS_Truck1	Federal Express-Air-FedEx 2day	21/10/22 11:56 PM	10
RCL_ASS4888	2	Each	Technician	FST.FS_Truck2	Federal Express-Air-FedEx 2day	21/10/22 11:56 PM	10
RCL_ASS4888	1,000	Each	M3.	--	--	19/10/22 11:56 PM	
RCL_ASS4888	1	Each	Manned Wareh...	M2.	DHL-Parcel-2nd day air	04/11/22 11:39 PM	
⊞ RCL_FSS4888	0	Each	M3.	--	--	19/10/22 11:56 PM	

- The check boxes control which searches are performed. Some of the sourcing options are available only for field service while some others are available for both customer support and field service. The options that you see depend on whether you're sourcing parts for a service request or service work order.
- The Parts Search window sorts the sourcing options from the lowest to the highest shipping costs. The Parts Search window only lists the ship methods that meet the need-by date. Select a row or source and then save

your choice, by clicking **Save and Close**. This updates the part requirement with a new source stocking location, shipping method, and arrival date.

- Select a new date in the Need By field in the Add Part window. This lets you search for the part when you don't find it with the original date or if the program returns suboptimal stocking locations.

The parts search program uses shipping zones to find the stocking locations/internal locations that can supply the required parts to the ship-to address. Geographies define shipping zones and ship-to addresses map to geographies.

Let's look at how the sourcing options work.

**Sourcing options available only for field service work orders:**

Sourcing Option	Details
Technician	Part is sourced from the technician's trunk stock subinventories that can supply the ship-to address zone (set up in the Manage Transit Times page).  When you source from a technician's trunk stock subinventory, a reservation is created.
Site Dedicated	Part is sourced from the site-dedicated stocking locations (subinventories) associated with the customer ship-to address in the Service Logistics Manage Stocking Locations page.  When you source from site-dedicated locations, a reservation is created.
Unmanned	Part is sourced from unmanned warehouses that can supply to the ship-to address zone as set up in the Manage Transit Times page.  When you source from unmanned warehouses, a reservation is created. It's required that you define a shipping method in the Manage Transit Times page but it's not used in this case.
Inventory Source	Search program uses inventory replenishment rules to find stocking locations that can resupply a field stocking location, which is usually the technician's trunk stock. The inventory sources can be defined for combinations of inventory organization, subinventory, and item.  If you select this sourcing option, a transfer order is created without a shipping method or an arrival date and time, as inventory sourcing rules don't include ship methods.

**Sourcing options available for service requests and field service work orders:**

Sourcing Option	Details
Manned	Part is sourced from manned warehouses that can supply to the ship-to address zone (set up in the Manage Transit Times page). The search program calculates the arrival date and time for each shipping method, based on the transit times you define in the Manage Transit Time page. It then filters out the shipping methods that can't meet the need-by date.  If you're sourcing for a work order, a transfer order is created to ship the parts to the technician subinventory. If you're sourcing for a service request, a sales order is created to ship the parts directly to the customer.
Global Order Promising	Select to use the GOP sourcing process.

## Search and Order Parts from Multiple Stocking Locations

If you're adding parts from the Add Part window and the parts search programs can't find the required quantity in a single location, the Parts Search window opens. This allows you to search and order parts from multiple stocking locations. In this case, the required quantity appears in the header region of the window and the ordered quantity appears in the search results table. The ordered quantity defaults from the required quantity, utilizing parts from the lowest shipping cost locations until the sum of the ordered quantities equal the required quantity. If two stocking locations have the same shipping costs, Service Logistics uses the location with the most parts. You can also make adjustments to the quantities in the results based on your preferences.

### Search for alternate parts:

If the original part is available, it's always used to fulfill the part requirement. However, if the part isn't available, you can search for substitute and supersession parts using the **Alternates** sourcing option in the interactive Parts Search page. Note:

- Automated parts search isn't configured to search for substitute and supersession parts.
- Substitute and supersession parts must be set up for the service parts in the Manage Item Relationships page of the Product Information Management cloud application.
- After you perform the search, the substitute and superseded parts that you can use will appear in the Parts Search window. The icons next to each item indicate whether the found part is a suppression or a substitute.
- When searching for superseded parts, the Parts Search program follows the entire link of superseded relationships. For example, if the part requirement is for part A and it's superseded by part B, which is superseded by part C, then the program searches for part A, then part B, then part C. The program uses the superseded part to completion before using supersession parts. In this example, if part B is available, it's used to fulfill the part requirement before part C.
- For substitutes, the Parts Search program looks only for direct substitutes as defined in the Manage Item Relationships page.

Note that the search results are also filtered based on the following:

- The source inventory organization must be able to ship the parts to the destination inventory organization when a part is being sourced for field service. It's important that these interorganization relationships are set up properly in the Manage Interorganization Parameters page.
- The shipping method must be valid at the source organization that's set up in the Manage Carriers page. This is important because in the Manage Transit Times page, you associate the shipping method with an internal location and not a source inventory organization.

### Related Topics

- [Configure Parts Search](#)

## Manage Part Requirements

### Overview of Managing Part Requirements

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

- Service requests and service work orders (generic, Oracle Field Service Cloud, and standalone) that originate from Fusion Service.

- Third-party objects such as legacy system service requests or work orders.
- Field stock replenishment.

This means that you can:

- Create orders for field service technicians who aren't authorized to order parts.
- Manage back orders.
- Cancel part orders (for transfer orders and sales orders).
- Delete part requirements.

To view and edit existing part requirement lines:

1. On the Manage Part Requirements page, enter your search criteria. You can refer to the field descriptions from the following table.

Attribute	Description
Document Type	<p>Source of the part requirement, such as a service request, work order, field service parts replenishment request, or a third-party work order or service request. Values are derived from the lookup code ORA_RCL_SOURCE_DOC_TYPE. Service Logistics has the following document types seeded:</p> <ul style="list-style-type: none"> <li>○ <b>Service Request</b></li> <li>○ <b>Service Work Order</b></li> <li>○ <b>Replenish Trunk Stock</b></li> <li>○ <b>Replenish Warehouse</b></li> </ul> <p>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.</p> <p>The Service Work Order document type is used for generic work orders, Oracle Field Service Cloud work orders, and standalone work orders.</p>
Document Number	Numeric identifier for the service request or work order.
Requirement Number	The part requirement number.
Customer	Customer for whom the order is created. List of values shows customer names of all organization parties.
Item	List of values shows all items in item master assigned to the default inventory organization.
Need By	Date by which the parts are required. If you enter a from date, you must enter a to date as well.
Order	Transfer order or sales order number.



Attribute	Description
Source Organization	All organizations modeled as an inventory organization.
Destination Organization	All organizations modeled as an inventory organization and with at least one subinventory set up in the Manage Stocking Locations page.
Destination Subinventory	All subinventories for the selected destination inventory organization.
Work Order Area	All work areas defined in the Service Logistics lookup ORA_RCL_WORK_AREA. Use this to retrieve part requirements for work orders assigned to the selected work area.
Technician	All TCA person parties with the field service technician usage code. Use this filter to retrieve part requirements created to replenish the field service technician's subinventories or to retrieve part requirements for work orders to which the field service technician has been assigned. This field isn't displayed when the user is a field service technician.
Not Sourced	Select to retrieve all part requirements that haven't been sourced yet.
Sourced Not Ordered	Select to retrieve all part requirements that have a source inventory location but haven't been ordered.
Include Closed Orders	Select to also retrieve part requirements for work orders that are closed.

2. Click **Search**. You will see a list of existing part requirements under **Search Results**.
3. Click the requirement number to go to the Create Part Requirements page and view the details and part requirement lines for the corresponding document type.
4. Here you can do the following:
  - o Click on the **Add Part (+)** button to add parts to the existing requirement.
  - o Click on the **Delete (X)** button to remove an existing part.
  - o Click **Order** to create a sales order or transfer order for the required part. You can create transfer orders for multiple part requirement lines. To do this, select all the part requirement lines and then click **Order**. Note that if you select part requirements that create sales orders along with part requirements that create transfer orders, only transfer orders are created.
  - o Click **Create Requirement** to navigate to a blank Create Part Requirements page where you can create a new part requirement.

**Note:** The document type indicates the source of the part requirement, for example a service work order or service request, field service parts replenishment request, or a third-party work order or service request. To use a non-Fusion Service object, such as a work order from a third-party service application, you must define the document type in the Service Logistics lookup ORA\_RCL\_SOURCE\_DOC\_TYPE.

**Note:** You can't edit part requirements for service requests and service work orders that have been created in the Fusion Service pages. Specifically, part requirements created in the Fusion Service pages can only be edited and canceled in those pages (for service request and work orders), even though they're visible in the Manage Part Requirements page.

**Note:** When ordering parts from unmanned, site-dedicated, and field technician inventory locations, inventory reservations are created instead of transfer orders. The status of these reservations appears in the **Status** column on the Manage Part Requirements page:

- **Reserved:** The part requirement has an associated inventory reservation.
- **Reservation Canceled:** The inventory reservation was deleted using one of the following methods:
  - Manually, from the part requirements table.
  - Manually, using the Reservations window in the Manage Field Parts Inventory page.
  - Automatically, when the associated Fusion Service work order was canceled.
- **Reservation Debriefed:** The part requirement reservation was automatically deleted when a corresponding parts debrief transaction (same work order, item, and subinventory) was created.
- **Reservation Unused:** The part requirement reservation was deleted as it wasn't used or debriefed. Unused reservations get deleted the first time a work order's charges are posted.

#### Related Topics

- [Cancel Parts Orders](#)
- [Manage Backorders](#)

## Cancel Parts Orders

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

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

## Cancel Sales Orders

To cancel a sales order:

1. Open the service request with an existing sales order.
2. In 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(X) 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, you'll receive a message.

## Cancel Transfer Orders

To cancel a transfer order:

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

A Supply Chain Orchestration web service stops the order fulfillment and cancels the transfer order. If the transfer order can't be canceled, you'll receive a message.

## Manage Backorders

Service Logistics interacts with Global Order Promising (GOP) to determine parts availability and return a source warehouse or subinventory when a sales order or transfer order is created.

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.

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, then the application will try to identify a default source warehouse based on the following inventory source setup:

- The source set up at the destination organization-subinventory-item level
- The source set up at the destination organization-subinventory level
- The 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 about setting up a default source for items, see the Getting Started with Service Logistics 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.

# Perform Mass Updates on Parts Requirements

## Perform Mass Updates on Part Requirement Lines

You can update the header fields in the Create Part Requirements page and copy the information to all unordered part requirement lines.

To perform a mass update on part requirement lines:

1. In the Create Part Requirements page, update any of the following fields:
  - o **Ship-to Customer**
  - o **Ship-to Address**
  - o **Need By**
  - o **Bill-to Customer**
  - o **Bill-to Account**
  - o **Bill-to Address**
  - o **Destination Organization**
  - o **Destination Subinventory**
2. Click the **Update Requirements** button to update the part requirement lines with the latest header values.

This automatically recalculates the charges, and refreshes the requirement lines table. However, the source stocking location for each part isn't updated.

# 3 Manage Parts Requirements in the Redwood User Experience

## Overview of Part Requirements in the Redwood UX

You can manage part requirements from the Part Requirements page in the Redwood UX.

Specifically, you can:

- Search for parts using seeded filters.
- Create transfer orders and reservations for part lines.

To access the parts requirements search, click **Part Requirements** in the drawer on the right side of the Service Logistics landing page.

**Note:** There are unique views for field service administrators and field service technicians available. Administrators can see all part requirements, but technicians can view only the part requirements assigned to them.

## Search for Part Requirements

You can use the Part Requirements search page to search for parts and create reservations in the Redwood UX.

Document Type	Document Number	Item	Quantity	Order	Need By	Source	Destination	Technician
Service Work Order	0000022022	RCL_FS54888	1		10/13/23, 2:46 PM	M3	FST_FS_Truck5	Kim Wood
Service Request	SR0000072164	RCL_AS54888	100		10/13/23, 1:17 PM	M2	RCL_M1	
Service Request	SR0000072165	RCL_AS54888	1	522095	10/13/23, 11:51 AM	RCL_M1	RCL_M1.Depot	
Service Request	SR0000072165	RCL_AS54888	1	522095	10/13/23, 11:51 AM	RCL_M1	RCL_M1.Depot	
Service Request	SR0000072165	RCL_SR_Serial	1	522095	10/13/23, 11:51 AM	RCL_M1	RCL_M1.Depot	
Service Request	SR0000072165	RCL_PR_Serial	1	522095	10/13/23, 11:51 AM	RCL_M1	RCL_M1.Depot	

**Prerequisite:** In order to use the elastic search on the Part Requirements search page, you may need to confirm that the **ESS job to create index definition and perform initial ingest to OSCS** has been run with the following input parameter: fa-scm-partrequirements

**Note:** You only need to run this job once when you first set up and configure the environment.

There are selectable filter chips available in the Search field, including:

- Need by
- Document Type
- Sourcing Status
- Ship-to Address Type
- Work Order Area

The Part Requirements search page includes the:

- Search bar
- Filter Chips suggestions bar
- Magnifying Glass icon
- Part Requirements results table

These are described in the following table:

### Part Requirements Search

Field Name	Description
Search bar	<p><b>Note:</b> Technicians (users with RCL_FSTECH_PARTS_REQUIREMENTS_SEARCH_PRIV privilege) will only see the following document types:</p> <ul style="list-style-type: none"> <li>• Service Work Order</li> <li>• Third Party Service Work Order</li> <li>• Replenish Trunk Stock</li> </ul> <p>The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include:</p> <ul style="list-style-type: none"> <li>• Need by (LOV)</li> <li>• Document Type (LOV)</li> <li>• Sourcing Status (LOV)</li> <li>• Ship-to Address Type (LOV)</li> <li>• Work Order Area (LOV)</li> </ul> <p>By default, the search page lists part requirements with <b>Need by</b> set to <b>This Week</b>.</p> <p>You can also enter free text, which will search the following part requirements attributes:</p> <ul style="list-style-type: none"> <li>• Document Number</li> <li>• Ship-to Address</li> <li>• Source Subinventory</li> <li>• Destination Subinventory</li> </ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• Work Order Area</li> <li>• Technician</li> <li>• Order</li> </ul> <p>Because the application supports autocomplete and fuzzy logic, you can partially type your search terms.</p> <p>The following attributes support autocomplete:</p> <ul style="list-style-type: none"> <li>• Customer</li> <li>• Item</li> <li>• Source Organization Code</li> <li>• Destination Organization Code</li> </ul> <p>The Item attribute also supports fuzzy logic.</p>
Filter Chips suggestions bar	<p>The filter chips appear under the Search bar and provide suggestions for filtering your results set. For example, you might see a filter suggestion for a document type for the part requirements. You can select this filter chip to filter your results.</p> <p>When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the results table.</p>
Magnifying Glass icon	<p>You can use the Magnifying Glass icon to filter your results based on seeded filter chips and their associated values. Specifically, the magnifying glass shows filter chips with preselected values. Some examples are:</p> <ul style="list-style-type: none"> <li>• Need By: Last Year</li> <li>• Document Type: Service Request</li> <li>• Sourcing Status: Not Sourced</li> <li>• Ship-to Address Type: Customer</li> </ul>
Part Requirements results table	<p>The Part Requirements results table lists the part requirements based on your search criteria and filters. You can also sort your results by selecting the arrows next to the column headers. When you first open the page, the part requirements are sorted by the document type.</p> <p>You can click the <b>Order</b> button for a selected part line to create transfer orders or reservations for parts.</p> <p><b>Note:</b> The <b>Order</b> button is disabled if the part line is either a service request or a service work order with a transfer order or reservation that already exists.</p>





# 4 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.

You will set up return routing rules to determine the correct inventory location or warehouse (destination subinventory) where the defective and excess parts will be shipped. Return 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.

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

If return routing rules aren't set up or can't be found, the destination subinventory is determined by the value of the profile option RCL\_DEF\_RETURN\_ORGANIZATION.

## Route Customer Returns

To route defective parts returned by the customer:

1. Navigate to the Fusion Service, Service Requests page.
2. Create or edit a service request to capture the details of the item returned by the customer.
3. Open the service request.
4. Under the Edit Service Request options, click **Parts**.
5. In the Parts tab, click the Add (+) button to go to the Add Part window.
6. Select the appropriate service activity from the Service Activity list of values.
7. Select the item to be returned. Enter the quantity and unit of measure.
8. Enter a return reason if required.
9. 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.
10. You can override this selection and choose an alternative warehouse.
11. After you have entered all the fields, click **Add**.
12. 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

In this section, you will 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 page.
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 return.
4. Click the **Actions** drop-down button. Click **Return**.
5. In the Return Part window, either the **Organization** field alone or both the **Organization** and **Subinventory** fields automatically populate with the default warehouse, which is based on the return routing rule setup.

**Note:** You can return parts to any inventory organization that meets the following conditions:

- Transfer Type: **Direct** and **Intransit** between **Source** and **Destination Inventory Organizations**.
- Transfer Order Required: **No** between **Source** and **Destination Inventory Organizations**.
- The selected item is associated with the 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 (the difference between the on-hand quantity and the maximum quantity).

6. The **Type** field defaults based on the **Destination Organization** that you select, such as **Direct Organization Transfer** or **Intransit Shipment**.

**Note:** If you define valid types for the transaction source in the Manage Inventory Transaction Sources and Types page, then the LOV includes other values.

7. Select the **Destination Subinventory** and the **Destination Locator** (if the locator is applicable).
8. For an intransit transaction, enter a shipment number in the **Shipment** field or click on the **Generate Shipment Number** to generate one.
9. Enter the quantity that you want to return.
10. For a serial-controlled item, enter the serial number of the item.
11. Click **Return**.

The selected parts directly transfer from the field inventory location to the destination warehouse.

If you're a field service technician, you can access this feature to return the defective parts yourself without the field service administrator's assistance. The organization and subinventory list of values filters and show only the stocking locations assigned to you.

# 5 Manage Field Service Work Orders

## Overview of Managing Work Orders, Charges, and Billing

Service Logistics supports the following work orders:

- **Generic work orders:** These work orders aren't integrated with any other application. Generic work orders are enabled and ready to use in Fusion Service. Field service administrators and field service technicians can both access these work orders in Service Logistics and manage associated tasks.
- **Standalone work orders:** These work orders are created in Fusion Service and aren't associated with any service request.
- **Oracle Field Service Cloud work orders:** These work orders are integrated with Oracle Field Service and are used to synchronize with field service activities. For Oracle Field Service Cloud work orders, technicians use Field Service to schedule visits, execute the repair work, and create debrief transactions. When a technician changes the status of an activity to completed, the debrief transactions are uploaded from Field Service to Service Logistics using Oracle Integration Cloud and Service Logistics REST APIs. The transactions are then visible in the Manage Work Orders and Charges page.
- **Third-party work orders:** These orders are integrated with other applications such as third party or legacy applications. For third-party work orders using third-party Field Service solutions, administrators can manually create and edit debrief transactions in the Manage Charges and Estimates page. Whereas Service Logistics provides a seeded document type Service Work Order to query generic and Oracle Field Service Cloud work orders, you must set up a document type to query third-party work orders.

Let's have a look at how these work orders are managed in Service Logistics:

### Generic and standalone work orders

1. The field service technician sees work orders assigned to them, but won't see unassigned work orders or work orders assigned to other field service technicians.
2. The field service technician queries the assigned work order.
3. The field service technician updates the work order status (traveling, working, on hold, complete, and so on). Note that field service administrators and technicians can access the Work Order Details page from Service Logistics and update it as required.
4. The field service technician orders parts. (See chapter 2 for details)
5. The field service technician debriefs parts, labor and expenses.
6. The field service administrator or technician reviews and adjusts the debrief and charges.
7. The field service administrator or technician adds the fixed charges.
8. The field service administrator or technician posts the charges.

### Oracle Field Service Cloud work orders

1. The field service administrator primarily searches for work orders from the work area but can use other search criteria as well.
2. The field service administrator queries completed work orders.
3. The field service administrator reviews and adjusts the debrief and charges.
4. The field service administrator adds the fixed charges.
5. The field service administrator posts the charges.

**Note:** You can create generic and Oracle Field Service Cloud work orders as standalone work orders. The standalone work orders in this case follow the same flow as the generic or the Oracle Field Service Cloud work order.

### Third-party work orders

1. The field service administrator queries third-party work orders.
2. The field service administrator creates parts, labor, and expenses debrief.
3. The field service administrator reviews and adjusts the debrief and charges.
4. The field service administrator adds the fixed charges.
5. The field service administrator posts the charges.

When charges are posted, a sales order is generated for invoicing and accounting. An SCM maintenance work order is created for costing, inventory and installed base updates.

**Note:** When a parts debrief line is added to the work order, an inventory reservation is created through the Inventory Reservation web service. This is to ensure that the part is reserved for a specific work order and won't show up as available in the technician's trunk stock to be used for any other task. When charges are posted, the part is issued to the maintenance work order and inventory is updated. If changes are made to the part debrief line, the reservation is also updated. If the part is no longer required, the debrief line is deleted and the reservation is canceled.

Associate projects to field service work orders:

You can opt in to the Project-Driven Supply Chain feature in your Manufacturing and Supply Chain Materials Management offering and associate project details to your field service work orders and third-party work orders. The project attributes are passed on to the SCM maintenance work order that's created when charges are posted. This integration lets you transfer the charges from work order debrief lines to the associated project as project expenditures.

In the following sections, learn how to use the various charges related pages to query work orders, add and review debrief, and manage charges.

## View Work Orders and Related Charges

In the Manage Work Orders and Charges page, you can view a list of work orders that are debriefed or to 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 page by clicking on any of the values in the Charges infolet on the Service Logistics landing page.

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

- A list of all the work orders created in Fusion Service: This includes Generic work orders, standalone work orders as well as Oracle Field Service Cloud work orders.
- 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.

Here's what you can do:

1. Click a document number link to access the Edit Work Order page and view the work order details. If you're a field service administrator, you can update the work order status, assign a technician, and edit other work order details.

2. Click the Service Request Number to access the service request details in the Edit Service Request page.
3. Click **Create Charges** to create debrief transactions for service work orders and third-party work orders.
4. Click **Create Estimates** to estimate fixed and variable charges for service work orders and third-party work orders.
5. Click the Manage Charges and Estimates icon for the corresponding service work order to access the Manage Charges and Estimates page where you can:
  - o View the service history and asset details for the work order.
  - o Edit the work order charges if debrief transactions have been entered.
  - o Review and edit the estimated cost of the work order before it's assigned to the technician.
  - o Associate project details to service work orders and third-party work orders (if you have opted in to the Project-Driven Supply Chain feature)
  - o Record the purchase order number when ordering parts and debriefing, so that the purchase order number appears on the sales order for invoicing.
6. You can also sort the columns, and show or hide the filter region from view. You can create a new filter to display data that's relevant to you.

Note:

- Both the field service administrators and field service technicians have access to the Manage Work Orders and Charges page. Field service technicians though will only be able to see the work orders assigned to them.
- The Create Charges button and the Create Estimates button will both take you to the Manage Charges and Estimates page. Work order charges and estimates are both accessed and managed in the same page. While the header region will remain the same, if you clicked on the **Create Charges** button to get to this page, you will see the Charges tab in focus. Similarly, if you clicked on the **Create Estimates** button, you will see the Estimates tab in focus.

## Create Charges

Use the **Create Charges** option to enter the debrief information for labor, parts and expenses for your third-party work orders and the service work orders that you haven't debriefed.

You'll use the **Create Charges** option to capture debrief transactions and create service charges for generic work orders and third-party work orders. Debrief and charges for Field Service Cloud work orders are created through an Oracle Integration Cloud (OIC) integration. Field Service administrators also use this page to review and adjust the charges from Oracle Field Service Cloud. See the Edit and Post Charges section that follows.

When you're performing break/fix field service, you don't need to select an asset before posting field service charges. In this case, the Post Charges program uses a fallback asset to create the maintenance work order that updates inventory, installed base, and cost accounting. The Field Service Fallback Asset Number profile option (RCL\_DEF\_FS\_FALLBK\_ASSET), stores the fallback asset number. Additionally, the **Cost Organization** list of values uses the fallback asset's operating organization when an asset hasn't been debriefed.

Select the cost organization that will be used to create the maintenance work orders when you post charges. The organization can default from either the asset being serviced or the field technician providing the service. This is determined by how you've defined the ORA\_RCL\_DEF\_COST\_ORG profile option.

To open the Manage Charges and Estimates page and enter debrief information for labor, parts and expenses:

1. In the Manage Work Orders and Charges page, click **Create Charges**.
2. Unless it's noted in the table, you can edit fields in the header region before posting your first charge line.

Field	Additional Information	Can you update this field before posting your first charge line?
<b>Document Type</b>	<p>Defaults to the <b>Service Work Order</b> value.</p> <p>This is a required field.</p>	No
<b>Document Number</b>	<p>Defaults from the Fusion Service work order number value passed from the Manage Work Order and Charges page.</p> <p>This is a required field.</p>	No
<b>Technician</b>	<p>Defaults from the Fusion Service work order technician on the Manage Work Order and Charges page.</p> <p>Required to post charges but not to save debrief header.</p>	Yes
<b>Business Unit</b>	<p>Defaults from the Fusion Service business unit on the Manage Work Order and Charges page.</p> <p>This is a required field.</p>	No
<b>Customer</b>	<p>Defaults from the Fusion Service work order or from the debrief header if it already exists.</p> <p>If the customer has a single account, then the account defaults based on the selected customer, or you can select an account from the LOV.</p> <p>This is a required field.</p>	No
<b>Account</b>	<p>Displays the account from debrief header if it exists.</p> <p>Required to post charges but not to save debrief header.</p>	Yes
<b>Bill-to Address</b>	<p>Defaults from the bill-to address from the debrief header if it exists.</p>	Yes

Field	Additional Information	Can you update this field before posting your first charge line?
	<p>If the customer and account have only one bill-to address, then it defaults, or you can select a bill-to address from the LOV.</p> <p>Required to post charges but not to save debrief header.</p>	
<b>Item</b>	<p>Displays the asset item from the debrief header if it exists.</p> <p>Defaults from the Fusion service work order from the Manage Work Order and Charges page or the Fusion Service Work Order page.</p> <p>Required to post charges but not to save debrief header.</p>	Yes
<b>Cost Organization</b>	<p>Select the cost organization that's used to create maintenance work orders when you post your charges. This organization can default from the asset being serviced or the field technician providing the service (based on the ORA_RCL_DEF_COST_ORG profile option setup). Change or confirm the maintenance work organization in the <b>Cost Organization</b> drop-down list to ensure that you post service costs (parts, labor, and expenses) to the correct business unit. This list contains the maintenance organizations that can service the asset's operating organization, which is set up in the Manage Maintenance Organization Relationships page.</p> <p>If you change the asset, then the cost organization updates to match the asset's operating organization.</p> <p>This is a required field.</p>	Yes

Field	Additional Information	Can you update this field before posting your first charge line?
	<p><b>Note:</b> When you're performing a break/fix field service, this list of values uses the fallback asset's operating organization when an asset hasn't been debriefed.</p>	
<p><b>Cost Subtype</b></p>	<p>Defaults from the work order subtype of the asset on the debrief/charges header. Change or confirm the cost subtype in the <b>Cost Subtype</b> drop-down list to ensure that you're posting charges to the correct account. This list contains the subtypes set up in the Maintenance lookup (ORA_MNT_WO_SUB_TYPE).</p> <p>This is a required field.</p>	<p>Yes</p>

3. Click the Labor tab and then click the **Create (+)** button to access the Add Labor Details window. Record the expenses incurred on labor and save the record. You must complete the **Activity, Item, Start Time** and **End Time** fields.
4. Click the Parts tab to create your parts debrief and then click the **Create (+)** button to access the Add Part Details window. Record the part details and save the record. You must complete the **Activity, Sub Inventory, Item, UOM,** and **Serial Number** fields.
5. Click the Expense tab to add details about other expenses and then click the **Create (+)** button to access the Add Expense Details window. Record the expense details and save the record. You must complete the **Activity, Item,** and **Expense** fields.

## Add Fixed Charge Items to Work Order Charges and Estimates

Follow this process to add fixed charge items to the work order.

A fixed charge may be for a task such as calibration or a charge for the technician visit. You will define the fixed charge items for your supply chain operation. In Service Logistics, you must set up the following before you can add fixed charge items to your work orders:

- Create a billing type for fixed charge under the EGP\_MATERIAL\_BILLABLE\_TYPE lookup type.
- Associate this billing type to the billing category Fixed Charge.
- Create a service activity and associate the service activity to the fixed charge billing type.



- Create items with the billing type for fixed charge.
- Define prices for these fixed charge items.

To add fixed charge items to work order charges:

1. Go to the Manage Charges and Estimates page for the selected work order.
2. Click on the Charges tab.
3. Click on the **Add (+)** icon to open the Add Fixed Charge Details dialog box.
4. Use the information below to add a fixed charge item:
  - **Activity:** Select the service activity code to add the fixed charge item. The list of values displays all service activity codes that are enabled and have a billing type mapped to the Fixed Charge billing category.
  - **Item:** Select the fixed charge item. The list of values displays all items which meet the conditions:
    - Item is mapped to the Service Activity Code selected by the user.
    - Item is assigned a billing type for fixed charge.
    - Item is associated to the inventory organization of the technician's default sub inventory.
  - **Description:** Description of the item selected.
  - **UOM:** By default, it's the primary unit of measure of the item selected. You can choose other UOMs that are part of the UOM class of the primary UOM.
  - **Quantity:** Enter the quantity of the fixed charge item.
  - **Note:** If you set up the descriptive flexfield in the Manage Descriptive Flexfields UI for the Debrief Line Attributes page, for the Expense fields context enter additional information that's specific to your fixed charge.
5. Click **Save and Close**.
6. Check that a charge line is created for the fixed charge item and visible in the Charges tab. You can edit and delete the fixed charge lines until the charges are posted. When charges are posted, the fixed charge items are added to the sales order.

To add fixed charge items to work order estimates:

1. Click on the Estimates tab.
2. Click on the **Add (+)** icon to open the Add Estimates dialog box.
3. Enter the required information. The fields are the same as listed in Step 4 of the procedure: To add fixed charge items to work order charges.
4. Click **Save and Close**.

## Create Debrief Corrections and Charges

You can correct debrief and billing mistakes for field service parts, labor, and expenses, without affecting your work order costs and inventory. This allows you to manually apply warranties and subscription coverages without navigating to Order Management or Receivables.

### Prerequisites

Confirm the following setups:

- Define labor and expense items as returnable in the Manage Items page.
- In the Service Activity Codes (SACs) page:

- Select the **Update Cost** check box for SACs that you'll use to create correction debrief transactions (costs) as well as service charges.
- Don't select the **Update Cost** check box for SACs that you'll only use to correct service charges.

To create debrief corrections and charges:

1. In the Manage Charges and Estimates page, click the **Create +** icon to add a line to your sales order.
2. Select a credit service activity code (SAC).
3. Enter the line details.
4. Save. Costs are captured in a maintenance work order when you post the charges.

## Add Project Details to Work Orders

If you want to associate a project with service work orders and third-party work orders, select the Project-Driven Supply Chain feature under the Manufacturing and Supply Chain Materials Management offering in Setup and Maintenance.

The charges from the work order debrief lines for work orders with associated projects are posted to the Projects application as project expenditures.

The charges for work orders that don't have any project associated are posted as costs to the maintenance work orders.

To associate project details to your work order:

1. Go to the Manage Charges and Estimates page.
2. Query your work order. You can add project details to service work orders (Oracle Field Service Cloud and Generic) as well as third-party work orders.
3. Expand the Project Details region in the work order header area.
4. You can now add the following project attributes to the work order:
  - Project Number
  - Task Number
  - Expenditure Item Date
  - Expenditure Type

**Note:** The Expenditure Organization is a read-only attribute and defaults to the debrief maintenance work order organization.

5. Other than the previously mentioned key attributes, any additional attributes that are defined in the Projects setup will also be visible in this region

**Note:** The Project Details region is only visible when you opt in to the Project-Driven Supply Chain feature and complete the required integration setups with Oracle Projects.

## Estimate Charges

You can provide customers with cost estimates for work orders before performing the work. You can estimate costs for variable charges like labor, material, and expenses. You can also provide estimates for fixed charges, like cleaning fees.

A cost estimate helps the customer to decide whether they want to proceed with repairing the defective product or asset. When the customer approves the estimated cost of the work order, you can move the estimate status to Approved. The technician begins work and you can no longer add, edit, or delete the estimated cost for that work order. When the work order is completed, the field service technician creates a debrief. The field service administrator then reviews the debrief and posts the charges to generate the customer invoice.

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

To estimate charges for service 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 the **Manage Charges and Estimates** icon. The Manage Charges and 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 (+) button. The Add Estimates window opens. All of the fields are empty and the following fields are read only: **Quantity**, **UOM**, **Expense Amount**, and **Currency**.
4. Select a service activity from the **Activity** list of values.

**Note:** Each service activity is associated with one or more billing types (such as labor, material, expense, and fixed charge). Each item is associated with only one billing type. When you select a service activity, only items with a billing type tied to that service activity will be available in the Item list of values.

5. Select an item.
  - o If the billing type for the item is Labor or Material, then the Quantity and UOM fields are enabled.
  - o If the billing type is Expense, then the Expense and Currency fields are enabled.
  - o You can also add fixed charge items to your work order estimate. The item must be assigned with the billing type that's defined for fixed charges.
6. Enter the required details and click **Save and Close** or, to save your estimate line and create another line without leaving the Add Estimates window, click **Save and Add Another**.
7. When you're done adding lines, click **Save and Close**. Each estimate line you added is created and displayed in the Estimates tab of the Manage Estimates page. The item price is derived from Oracle Pricing.
8. Repeat steps 1 through 6 for each estimate line.
9. Click on the **Amount** link to view the pricing details of the estimated amount at each line level. The Amount dialog box displays all the pricing components and adjustments from Pricing, which includes automatic adjustments, such as for subscriptions, as well as any manual adjustments that you enter. The subscription coverage and subscription number appear, so that you can research any billing discrepancies.
  - a. **Pricing Components:** Describes the breakdown of the price components used to calculate the price on the charge line, including subscriptions and any other adjustments.
  - b. **Unit Price:** Lists the unit price of the charge line.
  - c. **Amount:** Includes the total amount the customer will be billed for the line.
  - d. **Your Price:** Includes the total price the customer will be billed, including any pricing adjustments.

- e. **Exclusive Tax:** Includes the estimated sales tax.

**Note:** Service Logistics supports inclusive and exclusive taxes. Inclusive taxes are included in the list price, while exclusive taxes are a separate price component.

- f. **Net Price Plus Tax:** Includes the sum total for **Your Price** and **Exclusive Tax** amounts.

10. Verify that:

- o Total Material equals the sum of all estimated material charges.
- o Total Labor equals the sum of all estimated labor charges.
- o Total Expenses equals the sum of all estimated expense charges.
- o Total Fixed Charged equals the sum of all estimated fixed charges.
- o Grand Total equals the sum of all the estimated charges.

- 11. You can edit an estimate line by selecting the row and clicking the **Edit** (pencil) icon. You can delete a line by selecting the row and clicking the **Delete** (X) icon.
- 12. You may need to edit the estimated price for items before sending the work order estimate to the customer. You may do this to include warrant coverage or other terms in the service contract with the customer. Click on the pencil icon in the Your Price column for the price that you want to adjust. The Edit Price dialog box opens.
- 13. In the **Edit Price** dialog box, the price is adjusted according to the adjustment type you choose and the amount you enter. Use the following information to edit the price.

- a. Select the adjustment type. Here are the adjustments that you can make:

- Discount Percent
- Discount Amount
- Markup Amount
- Markup Percent
- Price Override

- b. Enter the adjusted price amount.

- c. Select the basis or the price element. This is the pricing entity used to calculate the price for example the list price or net price.

- d. Select a reason for the adjustment. Seeded values include Price match, Sales negotiation, Error correction, and Other. You can add your own custom adjustment reasons while setting up Service Logistics.

- e. Click Save and Close to save the adjustment line and close the dialog box. You can add multiple adjustment entries for a single line item. When there are multiple line entries, the price is adjusted as per the sequence of the entries.

- f. You can also delete an entry that's not required.

To estimate charges for third-party work orders:

1. On the Manage Work Orders and Charges page, click **Create Estimates**. The Manage Charges and Estimates page opens.
2. Enter the work order details.
3. Follow the process previously described for estimating service work orders, beginning with Step 3.

## Edit and Post Charges

Labor, part and expense debrief transactions entered by technicians in Field Service are automatically transferred to Service Logistics through web services. You can review and edit debrief transactions and post work order charges in the Manage Charges and Estimates page.

If field service technicians don't have the privileges to post charges, they will review the debrief lines and acknowledge that the debrief is completed. Field service administrators will then review these debrief charge lines and post the charges. When charges are posted, the cost of the service is captured and a sales invoice is generated for the customer. Discounts that are mentioned in the service contract for the customer and asset are applied to the prices before the final charges are calculated. The inventory balance is also adjusted based on the parts used or returned and the customer's asset configuration is updated.

You can also create charges to correct billing and debrief mistakes that do not affect costs and inventory.

For generic work orders, standalone work orders, and third-party work orders, charges must be created first using the Create Charges option.

To edit and post charges:

1. Select the work order for which you will be posting the charges. Click on the **Manage Charges and Estimates** icon. The work order will open in the Manage Charges and Estimates page where you will see the work order header details, service overview, and service history.
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. Here's some useful information about the various debrief lines:
  - o Parts Lines
    - Quantity = value entered in the debrief line
    - UOM = value entered in the debrief line ( defaults from the item's primary UOM. LOV displays all the UOMs in the same UOM class as the primary UOM)
    - Inventory organization is entered in the debrief line
    - When the debrief line is added, an inventory reservation is created so that the part requested won't show up as available in the technician's trunk stock. If you edit that part debrief line, the reservation is also modified accordingly. Similarly, if you add a new part debrief line, a corresponding inventory reservation will be created.
    - If a project is associated with the work order, you can issue service parts from the common inventory instead of the project-specific inventory when you create the part debrief. Note that:
      - o This feature is available only for project enabled organizations.
      - o In order for the part or item to be available in the common inventory, the **Allow Use of Common Supply** attribute must be set up for the item in Product Information Management.
      - o The **Use Common Inventory** check box appears in the Add Part Details window only for the items with the **Allow Use of Common Supply** attribute enabled.
    - You can capture the parent asset details along with the serial number of the issued part during the debrief process. This ensures that the asset hierarchy is updated simultaneously in Installed Base. You can do this in both the Add Part Details window (when creating a new part debrief line) and the

Edit Part Details window(when editing an existing part debrief line). Note that the parent asset on the part install debrief transactions defaults from the asset on the work order.

**Edit Part Details** [X]

\* Activity: Install

\* Sub Inventory: FST.FS\_Truck1

\* Item: RCL\_PR\_Serial

Description: RCL Serialized Asset Item

\* UOM: Each

Quantity: 1

\* Serial Number: 0002

Asset Number: 100100158394125

Parent Asset: FS54888 IB Asset 1

[Save and Close] [Cancel]

Field	Description
Asset Number	Displays the asset number for the serial number entered. This field is displayed only when the service activity selected is Install and the selected item is an asset tracked item and is serial controlled.
Parent Asset	List of values displays Installed Base assets that are already part of the debrief header asset's configuration. This field is displayed only when the service activity selected is Install and the selected item is an Installed Base asset. The parent asset information collected during the debrief process is used to update the Installed Base configuration and hierarchy for the debrief asset.

Field	Description

- o Fixed Charge Lines
    - Quantity = value entered in the debrief line
    - UOM = value entered in the debrief line (defaults from the item's primary UOM. LOV displays all the UOMs in the same UOM class as the primary UOM)
  - o Expense Lines
    - Item = Expense (for example tolls, parking, hotel, and so on)
    - Expense here's the same as Quantity and Currency is equivalent to UOM. In the Charges tab, you will see these values under the Quantity and UOM fields. Note that the user enters the payment currency and not the billing currency.
    - Amount = Net Price of Service Charge to customer
    - The inventory org defaults from the technician's default subinventory (or the Default Inventory Org profile)
  - o Labor Lines
    - UOM = Labor item's Primary UOM
    - Quantity = Calculated based on the start and end times entered in the debrief line.
    - The inventory org defaults from the technician's default subinventory (or the Default Inventory Org profile)
3. Click the **Charges** tab. You will see the summary of all charges incurred on the work order and the total amount that will be invoiced to the customer. The **Estimated Total Amount** field at the bottom of the Charges tab gives you the total work order estimate. You can compare the estimated amount with the final charges and make adjustments as required prior to posting the charges.
  4. The final price is calculated after applying the warranty and all service contracts discounts for the customer and asset. To see the discounts that have been applied, click on the amount displayed for each debrief line. For example, click on the amount displayed for item Labor.

- A dialog box will open displaying all the pricing components and the corresponding charges. Here you can see the discounts that have been applied.

**Amount: Labor - Sale Price** ✕

**Pricing Segment** Corporate Segment

**Strategy Name** Corporate Pricing Strategy

**Currency** USD

Pricing Components	Unit Price	Amount
Base List Price Applied from CMF-BR4	75.00	300.00
List Price	75.00	300.00
Adjustment 2.5 Percent applied for Service coverage RCL_Subscription_Coverage CDRM_10004	-1.88	-7.50
Adjustment 5 Percent applied for Service coverage RCL_PARTY_SITE CDRM_13009	-3.75	-15.00
Your Price	69.38	277.50

Hover over the charge explanation that has the subscription coverage to see the complete explanation along with the subscription number. Note that the subscription coverage is derived from the work order asset on the debrief header.

- You may need to manually adjust the prices when there is a discrepancy between the price that the customer was promised and the final amount returned by Pricing or to provide further discounts. To adjust the price of



any item at this stage, select the item and click the pencil icon in the Your Price column. The Edit Price dialog box appears.

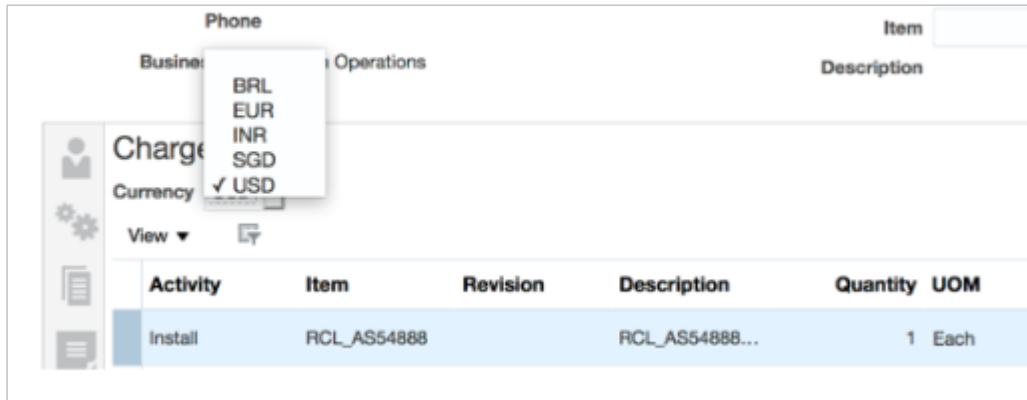
- a. Select the adjustment type. Here are the adjustments that you can make:
  - Discount Percent
  - Discount Amount
  - Markup Amount
  - Markup Percent
  - Price Override
- b. Enter the adjusted price amount.
- c. Select the basis or the price element. This is the pricing entity used to calculate the price for example the list price or net price.
- d. Select a reason for the adjustment. Seeded values include Price match, Sales negotiation, Error correction, and Other. You can add your own custom adjustment reasons while setting up Service Logistics.
- e. Click Save and Close to save the adjustment line and close the dialog box. You can add multiple adjustment entries for a single line item. When there are multiple line entries, the price is adjusted as per the sequence of the entries.
- f. You can also delete an entry that's not required.

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

- o Charges haven't yet been posted.
- o The **Allow manual adjustment** check box is selected in the charge line for the item when it's being priced in Oracle Fusion Pricing.

7. You can also change the currency that's used to bill the customers for the services provided. The **Currency** field displays the default currency in which the current charges are calculated. Click on the drop-down button to select another currency. All existing charge lines will be repriced using the new currency exchange rate. This is useful when the default currency returned from Pricing isn't correct or when you want to generate customer

invoices in their local currency. Note that the Currency drop-down list displays the currencies derived from the pricing strategy.



8. After you have reviewed all charges and finalized the prices, click **Post Charges**.
9. Field service administrators dealing with a large volume of work orders on a daily basis may review charges for a work order and then click the **Post Charges and Close** button and move on to the next work order. This button initiates a background job to post the charges and then close the Manage Work Orders and Charges page.
10. If you don't have the Post Charges privilege assigned, you won't see the **Post Charges** button. Instead, you will see the **Complete Debrief** button.
11. Click **Complete Debrief**. The status of the debrief line is updated to the **Needs Review** status. Field service administrators will review these charge lines and then post the charges.

## Bill Multiple Parties for Field Service

Learn how to bill multiple parties for field service.

In most cases, the customer at the debrief header level is charged for parts, labor, and other expenses incurred on the service work order. However, you can bill multiple parties for the same service work order by changing the customer, account, and bill-to address at the individual debrief lines. When a different customer, account and bill to address is added to a debrief line, a matching sales order line is created to generate the invoice for the newly added customer details.

To create charges against multiple parties:

1. Open the service work order in the Manage Work Orders and Charges page. Click **Charges**.
2. To see the default billing details for each item, click on View, then Columns. Select the check boxes for customer, account, and bill-to address.
3. To charge a different customer for an expense incurred, select the debrief line, and click on the Bill To Details icon that is displayed on that debrief line. The Bill to Details dialog box appears. You will see the default values that are derived from the debrief header.

4. Select your customer, account, and bill-to address from the list of values. Note that the debrief charge lines are priced based on the bill to details at the line level. Any additions or changes to the charge lines effect the total line amount and pricing is re-calculated to ensure that the correct amount is used for invoicing.

## How Can You Post Field Service Charges Automatically?

The Service Logistics Automatically Post Charges feature lets you define processing rules to automatically post charges for field service debrief.

After you have opted in to this feature, you will set up the automatic processing rules in the Manage Auto Processing Rules for Charges page. When the field service debrief is created, a rule validation web service starts automatically to validate the charge lines against the rule conditions and process the charges.

- If all the rule conditions are met, the charges are posted automatically and a sales order is created.
- If there are errors, the charges aren't posted and the debrief status is changed to **Needs Review**.
- Field service administrators can see the count of charge lines in the **Needs Review** status in their landing page. When the field service administrators reviews these debrief lines, the corresponding charge lines display the reason why the charge line wasn't automatically posted along with the conditions that failed the rule check.
- After the errors are corrected, the charges can be posted.



# 6 Manage Work Order Charges in the Redwood User Experience

## Overview of Work Order Charges in the Redwood UX

You can search for work orders, and create and edit debrief transactions using the Work Order Charges pages in the Redwood UX.

Specifically, you can:

- Search for work orders that are associated with a debrief header transaction.
- Create debrief transactions for new work orders.
- Add, edit, and post charges for your work orders.
- Add, edit, and review manual adjustments applied to the charge lines on your work orders.

To access the Work Order Charges page, click the **Work Order Charges** link in the drawer on the right side of the Service Logistics landing page.

## Search for Work Order Charges

You can use the Work Order Charges search page in the Redwood UX to search for charges associated with field service work orders and third-party work orders.

You can't search for work orders that don't have charges.

Document Number	Work Order Status	Service Request Number	Customer	Debrief Status	Asset Number	Technician	Manage Charges
0000017017		SR0000061124	GREEN CORP	New		Kim Wood	
0000015017	Started	SR0000059124	FIRST SOFTWARE	New	RCL_ASSET	Fred Brammer	

**Prerequisite:** In order to use the elastic search on the Work Order Charges search page, you may need to confirm that the **ESS job to create index definition and perform initial ingest to OSCS** has been run with the following input parameter: fa-fscm-wocharges

**Note:** You only need to run this job once when you first set up and configure the environment.

The Work Order Charges search page includes the:

- Search bar
- Filter Chips suggestions bar
- Magnifying Glass icon
- Charges results table

These are described in the following table:

### Work Order Charges Search

Field Name	Description
Search bar	<p><b>Note:</b> Technicians will only see the work order charges assigned to them.</p> <p>The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include:</p> <ul style="list-style-type: none"> <li>• Work Order Area (LOV: Filters by the work area on the Fusion Service work order that's associated to the charges. It doesn't apply to third-party work order charges).</li> <li>• Debrief Status (LOV)</li> <li>• Work Order Resolution Due Date (range)</li> <li>• Work Order Status (LOV: Filters by the status of the Fusion Service work order that's associated to the charges. It doesn't apply to third-party work order charges).</li> <li>• Work Order Requested Date (range)</li> <li>• Work Order Scheduled Date (range)</li> </ul> <p>By default, the search page lists searches for charges associated with field service work orders and third-party work orders using the following criteria:</p> <ul style="list-style-type: none"> <li>• Work area: Assigned to you</li> </ul> <p><b>Note:</b> The RCL_DEF_WORK_ORDER_AREA profile defines your assigned work area. If the profile isn't defined, then the work order area comes from the ORA_RCL_WORK_AREA lookup setups, which are defined in the Manage Service Logistics Lookups page.</p> <ul style="list-style-type: none"> <li>• Debrief status: New</li> <li>• Resolution date: Today</li> </ul> <p>You can also enter free text, which will search the following charges and work order attributes:</p> <ul style="list-style-type: none"> <li>• Customer</li> <li>• Technician</li> <li>• Item</li> <li>• Asset Number</li> </ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• Document Number</li> <li>• Service Request Number</li> <li>• Serial Number</li> <li>• Work Order Type</li> <li>• Purchase Order Number</li> <li>• Customer Account</li> <li>• Business Unit</li> </ul> <p>Because the application supports autocomplete and fuzzy logic, you can partially type your search terms.</p> <p>The following attributes support autocomplete:</p> <ul style="list-style-type: none"> <li>• Customer</li> <li>• Technician</li> <li>• Item Number</li> <li>• Serial Number</li> </ul> <p>The following attributes support fuzzy logic:</p> <ul style="list-style-type: none"> <li>• Customer</li> <li>• Technician</li> </ul>
Field Chips suggestion bar	<p>The filter chips appear under the Search bar and provide suggestions for filtering your results set. For example, you might see a filter suggestion for a date range for the work order's requested date. You can select this filter chip to filter your results.</p> <p>When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the Charges results table.</p>
Magnifying Glass icon	<p>You can use the Magnifying Glass icon to filter your results based on seeded filter chips and their associated values. Specifically, the magnifying glass shows filter chips with preselected values. Some examples are:</p> <ul style="list-style-type: none"> <li>• Debrief status: New</li> <li>• Work Order Status: Scheduled</li> <li>• Resolution Date: This Year</li> </ul>
Charges results table	<p>The Charges results table lists the work order charges based on your search criteria and filters. You can also sort your results by selecting the arrows next to the column headers. When you first open the page, the work order charges are sorted by the document number.</p> <p>To edit existing work order charges, you can open the Work Order Charges details page by clicking the <b>Manage Charges</b> icon.</p> <p>To enter new charge lines, you can open the Work Order Charges header page by clicking the <b>Create Charge</b> button.</p>

## Create Work Order Charges

You can use the Work Order Charges Search page in the Redwood UX to access the Work Order Charges header. Here, you can create a new work order debrief header, and view service request and work order details.

### Create a Work Order Debrief Transaction

To create new work order debrief transactions from the Work Order Charges search page:

1. Click **Create Charge**. This opens the Work Order Charges header page.

2. Confirm the required information for the Work Order, Customer, Asset, and Technician sections:

Required Fields	Default Value
<b>Document Type</b>	Defaults to Service Work Order when the page is opened from the Work Order Charges page or the B2B Service Work Order page.
<b>Document Number</b>	No default value
<b>Customer</b>	Defaults from B2B work order.
<b>Account Number</b>	No default value
<b>Bill-to Address</b>	No default value
<b>Business Unit</b>	Defaults from the B2B work order business unit.  No default value for third-party work orders.



Required Fields	Default Value
<b>Serial Number</b> (required for serialized assets)	No default value
<b>Cost Organization</b>	Defaults from the operating organization of the asset on the Debrief/Charges header.  For Preventive Maintenance B2B work orders, the default value is from the maintenance work order that's already created.
<b>Technician</b>	Defaults from the B2B work order, if one exists.

3. Click **Create and Close** to create only the debrief header.
4. Click **Create and Continue** to save the debrief header and continue adding charge lines for the work order.

## View Service Request and Work Order Details

After you create the work order header you can access detailed information by viewing the associated service request and work orders:

1. Navigate to the service request associated with the work order by clicking the **View Service Request** button in the header region.
2. Open the associated detail page by clicking the **Document Number** link for the work order.
3. Open the associated detail page by clicking the **Asset** link for the work order.
4. Access the Service Request Charges page by clicking the **Review Service Request Charges** button.
5. View a summary of total charges and the currency in the Charges table.
6. Click the **Amount** link to view the pricing details of the amount at each level.. The **Review Charge Amount** drawer displays all the pricing components and adjustments from Pricing, which includes automatic adjustments, such as for subscriptions, as well as any manual adjustments that you enter. The subscription coverage and subscription number appear, so that you can research any billing discrepancies.
  - a. **Pricing Components:** Describes the breakdown of the price components used to calculate the price on the charge line, including subscriptions and any other adjustments.
  - b. **Unit Price:** Lists the unit price of the charge line.
  - c. **Amount:** Includes the total amount the customer will be billed for the line.
  - d. **Your Price:** Includes the total price the customer will be billed, including any pricing adjustments.
  - e. **Exclusive Tax:** Includes the estimated sales tax.
 

**Note:** Service Logistics supports inclusive and exclusive taxes. Inclusive taxes are included in the list price, while exclusive taxes are a separate price component.
  - f. **Net Price Plus Tax:** Includes the sum total for **Your Price** and **Exclusive Tax** amounts.

**Note:** You can add and modify a work order's descriptive flexfields until you've posted your charges.

## Edit Work Order Charges

You can use the Work Order Charges Search page in the Redwood UX to access the Work Order Charges details page. Here you can edit charges before you post them.

To open the Work Order Charges details page from the Work Order Charges Search page:

1. Click the **Manage Charges** icon. This opens the Work Order Charges details page.

The screenshot displays the Oracle Work Order Charges details page. At the top, there's a header with the Oracle logo and navigation icons. Below the header, the page title 'Work Order Charges' is visible, along with a 'Cancel' button and a 'Post Charges and Close' button. A 'Select Status' dropdown and 'Document Number' (000010010) are also present.

The 'Work Order' section includes an 'Add Charges' dropdown and a table with the following data:

Document Number	Customer	Bill-to Address	Item	Asset	Technician	Debrief Status	Actions
000010010	FIRST SOFTWARE				Maggie Munro	New	[Edit]

The 'Charges' section features a 'Reprice' button, a 'Change Currency' button, and a table with the following data:

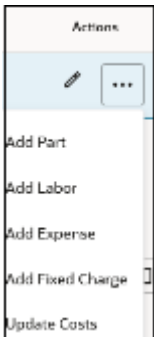
Activity	Billing Type	Item	Description	Quantity	UOM	Charge Type	Your Price	Amount	Order	Invoice	Sta	Actions
Install	Labor	Labor	Labor Charge for Service	216	Hour	Sale Price	75.00	16,200.00			Ne	[Edit] [Delete]
Install	Expense	Expense	Expense Charge for Service	50	Dollars	Sale Price	100.00	5,000.00			Ne	[Edit] [Delete]
Install	Material	RCL_AS54888	RCL_AS54888_Desc	5	Each	Sale Price	100.00	500.00			Ne	[Edit] [Delete]
<b>Total Charges</b>								<b>21,700.00</b>				

2. Prior to posting charges, in the Work Order table:
  - o Review the work order header information.
  - o Edit the header details by clicking the **Edit** icon.
3. Add new charges by clicking **Add Charges** in the Work Order section.
4. In the Charges table, edit an existing charge by clicking the **Edit** icon at the line level for any charge line.
5. Add and edit manual adjustments to the charge lines by clicking the **Your Price** link.
6. Review the applied adjustments by clicking the **Amount** link.
7. Optionally, update any charge line that hasn't posted by clicking the **Edit** icon for that charge line.
8. Reprice the charge lines based on your pricing strategy setup by clicking the **Reprice** button.
9. Select an action to add charges to the work order, such as parts, labor, and expenses:
  - o **Add Part**
  - o **Add Labor**
  - o **Add Expense**
10. Change the currency for charge lines and view the price and amount in your desired currency based on your pricing strategy by clicking the **Change Currency** button.

11. Post the work order charges by clicking **Post Charges and Close**.

## Post Field Service Costs without Posting Associated Charges

You can create a correction charge for posted charges that creates a correction sales order line. The correction sales order references the original sales order line so that Accounts Receivable links the credit to the original invoice line.



To update inventory and asset tracking without creating sales order lines for invoicing:

1. Select **Update Costs** from the **Actions** list to start the Post Charges ESS job, which creates maintenance work order transactions to update inventory, asset tracking, and cost accounting.
2. After the process completes, confirm that the charge line status in the Charge table is Costed.

**Note:** This is useful for long running service requests with multiple work orders.

## Create a Correction that References an Original Charge

You can create a correction charge line that references its original charge for a corresponding sales order line when it has a corresponding sales order line that's been fulfilled.

When you post charges a new correction sales order is created that references the original order line. This reference flows to Accounts Receivable where the invoice lines are linked.

**Note:** For the correction icon to appear, you need the following:

- Charge line is posted.
- Service activity code (SAC) has the transaction category **Order** and the **Create Order** setting is enabled.

To create a correction that references its original charge:

1. In the Charges table on the Work Order Charges detail page, select the **Undo** action for the charge line. The Enter correction dialog appears.

**Note:** In edit mode, you can access this dialog by clicking the **Pencil** icon.

2. From the Activity LOV, select the service activity code. All other attributes are copied over from the original charge line.
3. Click **Add**.

## View Work Order Charges with the Technician View

If you're logged in with a technician role, you can still access the documents that are assigned to you during the debrief header creation.

To complete a debrief from the Work Order Charges detail page:

Click **Complete Debrief**. Your technician access provides this button rather than the **Post Charges and Close** button.

## Aggregate Charges by Service Request

You can use the Service Request Charges page in the Redwood UX to review work orders associated with a service request, and all of the charges associated with each work order.

The aggregation of work orders and charges into a single view lets you easily review and post service charges for a particular service request. You can also see the total charge amount for the all of the work done on the service request, which helps in making decisions, adjustments, and approvals.

To access the Service Request Charges page from the Work Order Charges detail page:

1. Click **Review Service Request Charges**.

You can review service request parameters, such as the service request number, status, customer, and the technician. You can also review charge amounts for any work order.

2. Click the **Document Number** link to access the work order charges for the selected work order.
3. Click the **Asset** link to navigate to asset details associated with a work order.
4. Select an action to add charges to the work order, such as parts, labor, and expenses:
  - o **Add Part**
  - o **Add Labor**
  - o **Add Expense**
5. Apply manual adjustments to any work order by clicking the **Your Prices** link in the Charges table.
6. Click **Reprice** to reprice all charges based on your pricing strategy.
7. Click **Change Currency** to recalculate charges in a different currency.
8. Click the **Invoice** link to check the invoice details.
9. Post your debrief charges at the service request level for all associated work orders by clicking **Post Charges and Close**. This launches the ESS job to post charges for all the charge lines.

# 7 Manage Depot Repair

## Overview of Depot Repair

Use the Depot Repair functionality to repair and return broken and serviceable customer products and parts.

### Manage Depot Repair page

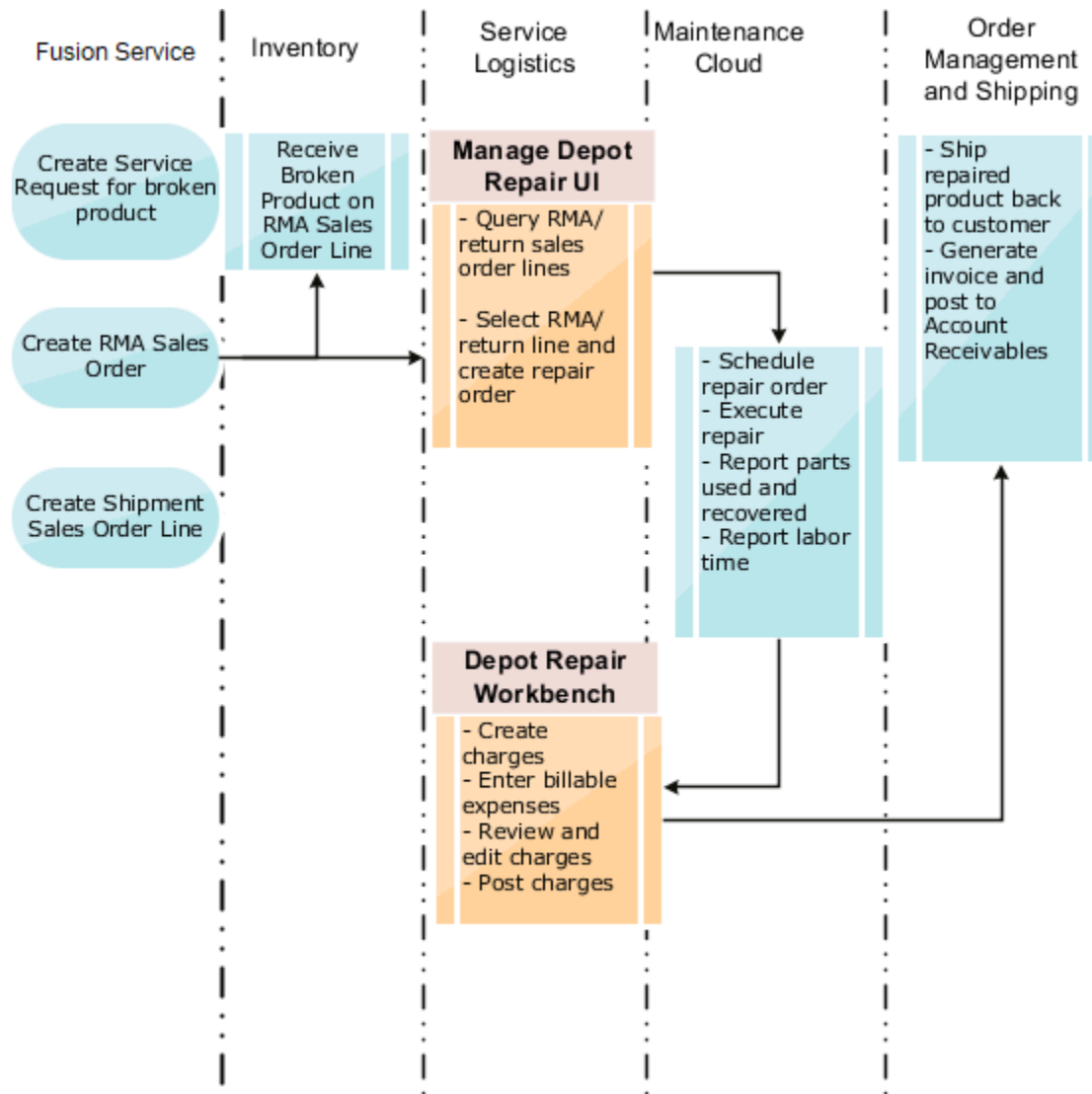
The Manage Depot Repair page in Service Logistics enables you to manage the complete end-to-end work flow of a repair depot. It gives you access to and visibility of all the existing and ongoing RMAs in a depot repair organization. The page also displays depot repair RMAs for assets that have passed or will pass through the selected inventory organization in the process of getting repaired.

### Depot Repair Workbench

The Depot Repair Workbench enables you to manage the repair and return of a single repair RMA or broken product. It provides the service history, logistics, asset, repair order and service request information for that product. It gives you access to the repair technician's debrief and lets you create and edit charges for that particular repair order. Support engineers can open the Depot Repair Workbench from the repair RMA return line in the Service Request Part Details tab. They can see the status of the repair, the logistics, asset details, estimates, and charges. This helps them to provide updates on the status of the repair to the customer.

See the diagram below to understand how the depot repair solution leverages existing Fusion Service, SCM Cloud and Service Logistics functionality to manage the entire repair and return process from service request and Return Material Authorization (RMA) creation through repair execution to shipping and billing.

How does the depot repair process work?



- In Fusion Service, customers report a product issue through the customer service and support organization. A support engineer creates a service request for the broken part and verifies the customer's warrant or service contract. The support engineer then diagnoses the issue and if it requires depot repair, creates the RMA Sales Order and sends the RMA number to the customer. Simultaneously, the support engineer also creates the corresponding shipment order line.

A repair RMA can also come from Order Management or created in electronic interfaces. If the RMA is created in Order Management, the order line type on the RMA created must be associated to a Service Logistics service activity code of type Return and which is tied to the depot repair logistics business process.

- The return and shipment lines are linked for processing so that Installed Base and the subscription contract are updated when the broken product or part is received and the repair or replacement is shipped. When the shipment order line is created for the repaired part, the source organization defaults from the RMA's destination organization. Note that the part is sourced from the repair center shipping dock and not from the parts supply chain. The shipment item defaults from the RMA item. The shipment service activity code defaults to the first shipment SAC that's set up in the Depot Repair Logistics business process.

- Depot repair managers will query all the RMAs in their depot repair inventory organization. Once the broken part is received in Inventory and the repair work is scheduled to begin, the Depot Repair Manager creates the repair work order using the appropriate work definition.
- The depot repair manager then assigns the work order to the repair technician.
- Depot repair technicians get their work from the dispatch list.
- Depot repair technicians repair the part and record their debrief using the Maintenance Management pages. The technicians record the time spent on the work and the spare parts they used or recovered. Although **Resource Activity** isn't a required field, you must define a resource activity in order to create charges in the Depot Repair Workbench.
- The Depot Repair Manager will click the **Create Charges** button in the Depot Repair Workbench for the selected RMA line and create the debrief and charges records for the maintenance work order. The labor, parts, and expenses debrief is now visible in the Depot Repair Workbench.
- The Depot Repair Manager can edit and adjust these charges if required. After that, the Depot Repair Manager will post these charges to create bill-only sales order lines.
- The shipment order details are then used in Order Management to ship the repaired part to the customer and generate the sales invoice.

### Associating Projects to Depot Repair Work Orders

If you opt in to the Project-Driven Supply Chain feature in your Manufacturing and Supply Chain Materials Management offering, you can associate project details to your depot repair maintenance work orders. Charges for work orders with associated projects are posted as project expenditures.

### Managing Complex Depot Repair and Return Logistics

In some instances, the broken part is transferred or moved across several locations before it's repaired and sent back to the customer. For example, the customer may return the broken part to the local warehouse from where it's transferred first to a distribution center and then to the actual repair depot. After the asset is repaired, it may be shipped back to the local warehouse or directly to the customer. In Service Logistics, you will create transfer orders to move the broken asset across multiple locations. The transfer orders are created in the Depot Repair Workbench and linked to the Depot Repair RMA. Support engineers can directly access the Depot Repair Workbench from the Service Request Details page and track the movement of the broken asset through its lifecycle. In the Manage Depot Repair page, transfer orders linked to the depot repair RMA are also factored in when a query is run to retrieve all the RMAs for an inventory organization.

### Create Multiple Depot Repair Work Orders for a Single RMA

You can also create multiple depot repair orders for a single RMA. You may need to do so in the following scenarios:

- When there are mistakes in an existing work order that need to be corrected, for example, over-reported labor hours. In this scenario, you can create a new depot repair work order even after the RMA and shipment sales order lines are complete.
- To manage work and costs at multiple locations in a complex depot repair supply chain.

You can see the multiple work orders when you query the RMA order line in the Depot Repair Workbench. The most recent work order is displayed in the Manage Depot Repair page.

### Service Activities for Depot Repair

You must set up service activities for your depot repair return and order line in the Manage Service Activities page. Service Logistics provides two seeded business processes that are used for depot repair activities:

- Depot Repair Logistics: Use this business process to set up service activities for a depot repair return and order line. These SACs should be set up with a Zero Charge attribute as these lines are for the return and shipment of a customer owned product or part. Use an SAC tied to this business process when you're adding parts, that

need to go for depot repair, to a service request. You will be able to create the RMA as well as the corresponding shipment order line at the same time.

- Depot Repair: Use this business process to set up service activities for depot repair debrief. The service activity code must also be mapped to the resource activity code used in the repair work order. You will use this to add the labor and parts that were used during repair.

## Create a Depot Repair Return Material Authorization (RMA)

You can create a depot repair RMA from the Service Requests Parts tab, the Create Part Requirements page, and from Order Management.

### Create an RMA from the Service Requests Parts Tab

In the Add Part page you can use a Depot Repair Return/RMA service activity code (SAC) to create the depot repair return part requirement and a corresponding shipment part requirement.

Click **Order** on the Part Requirement table the Service Request Parts tab to create the sales order return and shipment lines to initiate the depot repair process.

### Create an RMA from the Create Part Requirements Page

In the Add Part page you can use a Depot Repair Return/RMA service activity code (SAC) to create the depot repair return part requirement and a corresponding shipment part requirement.

Click **Order** on the Part Requirement table in the Service Request Parts tab to create the sales order return and shipment lines to initiate the depot repair process.

### Create an RMA from Order Management

You can create an RMA in Order Management that appears in the Manage Depot Repair page. From here you can work on the RMA.

For a Sales Order RMA line to drive depot repair and appear in the Manage Depot Repair page, the RMA needs the following:

1. Line category is RETURN.
2. Order line type (OLT) must be associated to an service activity code (SAC) with the Depot Repair Logistics business process and the RETURN line category.

## Manage a Repair Depot Using the Manage Depot Repair Page

In the Manage Depot Repair page, view all the Return Material Authorization (RMA) lines and repair orders for a repair depot and manage the flow of work to ensure that the repairs are conducted on time and within budget.



The Manage Depot Repair page also displays RMAs associated with transfer orders being ship to or from the inventory organization.

When multiple depot repair work orders exist for a single RMA, the most recent work order number is displayed in the RMA order line. The work order number is a concatenation of the RMA Number and the line number. If a new work order is created for the same RMA, a suffix is added to the work order number, for example -1, -2, and so on. This will help you to identify that more than one work order exists for the selected RMA line.

To query depot repair RMAs:

1. In the Service Logistics landing page, click the Tasks icon and then select **Manage Depot Repair**.
2. In the Manage Depot Repair page, enter your search criteria and then click **Search**.
3. In the search results region, see the list of RMAs and related information such as the service request number, organization summary information as well as the work order, debrief and shipment status.
4. If a repair order doesn't exist for the broken asset, select the RMA Line and click **Repair**. See the next section for details. Note that you can only create repair work orders when the RMA has been received into inventory.
5. Click the RMA Line link to go to the Depot Repair Workbench.

## Create Depot Repair Work Order

Follow these steps to create a depot repair work order.

**Note:** The Create Depot Repair Work Order window supports the creation of repair work orders for nonserialized and serialized assets.

1. Open the Manage Depot Repair page.
2. In the Manage Depot Repair page, enter your inputs to look for the depot repair RMA in your depot repair organization.
3. To create a depot repair order, select the RMA line and then click **Repair**. This will open the Create Depot Repair Work Order window where you will enter information to create the repair order.

Create Repair Order:

1. Use information from the table below to create the repair order for the broken part.

Attribute	Description
Work Order	System generated. Unique identifier of the work order.
Asset	Defaults from the service request.
Status	The status of the maintenance work order during its life cycle. Valid values are <b>Unreleased, Released, On Hold, Completed, Closed, and Canceled</b> .
Type	The maintenance work order type.

Attribute	Description
Organization	The maintenance inventory organization. Defaults from the current location where the asset is being repaired.
Subtype	The subtype of the maintenance work order. Select from the drop-down list.
Priority	The priority of the execution of the maintenance work order.
Planned Start Date and Planned Completion Dates	Select as per your plan.
Work Definition	The maintenance work definition. Defines the maintenance process in an organization and determines the routing operation, resources, and materials required to perform the repair. Choose from the drop-down list.

2. Click **Save and Close** once done. The repair order is created. Note that the order number is displayed in the Manage Depot Repair page against the selected RMA line.
3. To create more than one work order for the same RMA line, open the Create Depot Repair Work Order window again and enter the details. When multiple work orders exist for the same RMA line, the most recent work order is displayed in the Manage Depot Repair page.

Add Project Details to the Work Order:

1. Expand the Project Details region.
2. Add the following project attributes to the work order:
  - Project Number
  - Task Number
  - Expenditure Item Date
  - Expenditure Type

**Note:** The Expenditure Organization is a read-only attribute and defaults to the debrief maintenance work order organization.

3. Other than the previously mentioned key attributes, any additional attributes that are defined in the projects setup will also be visible in this region.

You can only associate projects to the depot repair work orders if you have opted in to the Project-Driven Supply Chain feature and completed the required integration setups with Projects.

Access the Depot Repair Workbench:

1. Click the **RMA Number link**. This will open the Depot Repair Workbench where you can view and manage all logistics and billing activities for the selected RMA line.

## Process a Repair RMA in the Depot Repair Workbench

The Depot Repair Workbench lets you view all the details for a single repair RMA and manage the repair and return of a broken asset.

1. On the Manage Depot Repair page, query the RMA lines for your repair depot. The search results include the RMAs for assets that are being repaired in the selected repair depot as well as the broken assets that have passed or are passing through the facility in the process of being repaired. The latter occurs in complex depot repair and return environments involving multiple internal transfers of the broken asset.
2. To access the Depot Repair Workbench and view the workflow for a specific broken asset, click the RMA Line link.

Main features of the Depot Repair Workbench:

- The header region and Overview tab provide the repair RMA details and other related information such as the service request number, asset, and repair order details. Here you can:
  - View a list of the repair work orders.
  - Click on the work order number to open the Edit Work Order page and view the work order details.
  - Click on the service request number to access the Edit Service Request page and view the service request details.
  - Click on the asset number to open the Asset Overview page and view details of the asset being repaired such as the asset configuration or the subscription coverage.
- In the Logistics tab, you can track the customer asset through the entire repair and return logistics flow. In complex depot repair and return logistics environments, you will create the transfer orders to manage the flow of the broken asset from the source to the destination organization. This tab displays all the transfer orders associated with the repair RMA as well as the repair RMA's return and shipment sales order lines.
- The History tab lets you view the product service history. Here you can click on the Document Number of a related work order or service request and view the work order and service request details for the broken asset.
- In the Estimates tab, you can estimate the cost of the repair order before the repair work is carried out. You can also adjust the estimated price of the items to include warranty coverage and other agreements.
- After the repair work is complete, click the **Create Charges** button to create the service charges for the labor, parts and expenses reported on the repair order. You can view the charges in the Charges tab of the Depot Repair Workbench.
- Review the debrief and add any additional expenses using the Labor, Parts, and Expense tabs. The work order number in the debrief line lets you identify the work order that generated the debrief transaction. This is useful when there are multiple work orders for a single repair RMA line.
- Change the part debrief service activity code to control downstream processing.
- Review and edit the charges as required to ensure that all the costs are reported and the customer is invoiced accurately.
- Post these charges using the **Post Charges** button to generate the bill only sales order and invoice. The repaired product is then shipped to the customer.

Support engineers and customer service representatives can access the Depot Repair Workbench from the service request in their Fusion Service application. They can create depot repair estimates, track the movement of the asset and the progress of the repair order, and keep the customer updated. Here are the steps to follow:

1. Open the service request raised for the broken product.

2. Go to the Part Details tab.
3. To access the Depot Repair Workbench, click on the icon next to the order number in the RMA return line.

## Use Transfer Orders to Manage Complex Depot Repair Logistics

Some organizations have a complex depot repair and return workflow where the broken part passes through multiple locations before being repaired and returned to the customer.

For example, from the customer to the local warehouse, then to a distribution center, and finally to the actual repair depot. After it's repaired, it's shipped from the repair depot to the local warehouse before being sent to the customer. In such cases, a transfer order is created to move the broken part from one facility to another. The transfer order is linked to the depot repair RMA Line to easily track and manage this multi-step depot repair and return workflow. There may be more than one transfer order for a single asset if it has to go through multiple locations before being repaired and shipped back to the customer.

Let's have a look at some examples:

In a local warehouse, a repair coordinator will use the Depot Repair Workbench to create transfer orders to ship broken assets to repair depots or distribution centers. They will use the Manage Depot Repair page to query all of their inbound RMAs.

In a distribution center, the manager will use the Depot Repair Workbench to create transfer orders to ship broken assets to repair depots and to ship the repaired asset back to the local offices or warehouses. The distribution center manager opens the Manage Depot Repair page to see all of the repairs that are headed to that distribution center by querying their distribution center inventory organization. The results table displays:

- all RMAs being shipped directly to the distribution center
- all RMAs tied to transfer orders and headed for (or already received into) the distribution center
- RMAs tied to transfer orders used to ship parts back to the local warehouse or office

In a repair depot, the depot repair manager uses the Manage Depot Repair page to manage the flow of work through the depot. The Depot Repair Workbench is used to create transfer orders to ship repaired assets to local offices or warehouses. The Logistics tab in the Depot Repair Workbench lets users manage the flow of a repair RMA through multiple stocking and repair center locations.

To create a transfer order:

1. Query the RMA Line for the broken asset.
2. Open the Depot Repair Workbench for the selected RMA Line.
3. Go to the Logistics tab.
4. Click on the **Actions** drop-down button and then click **Create Transfer Orders**.
5. Enter the source and destination organization and subinventory details.
6. The **Requested Ship Date** defaults to the current system date and time. Change the date if the repaired asset will be shipped at a later date.
7. Select a shipping method. The **Shipping Method** list of values displays all the ship methods (Service Level, Transportation Mode and Carrier) that are set up for the source inventory organization in the Manage Carriers page. This is an optional step.
8. Click **Apply**.
9. In the Logistics tab, you will first see the depot repair RMA and shipment order lines used to manage the return of the broken product from the customer and the shipment of the repaired product back to the customer. You will then see the transfer order or orders that are created to move the broken product across various locations.

# Create Depot Repair Estimates

You can estimate material, labor, expenses, and fixed charges for a depot repair work order in the Depot Repair Workbench.

This is especially useful for support engineers who can open the Depot Repair Workbench directly from Fusion Service (SR Parts tab) and create estimates to provide to the customer as well as monitor the progress of the repair.

To estimate charges for depot repair work orders:

1. Open the depot repair work order that you want to estimate costs for in the Depot Repair Workbench.
2. Click on the Estimates tab.
3. To add an estimate line, click the Create (+) button. The Add Estimates window opens. All of the fields are empty and the following fields are read only: **Quantity, Expense, and UOM**.
4. Select a service activity for depot repair from the **Activity** list of values.  
**Note:** Each service activity is associated with one or more billing types (such as labor, material, expense, and fixed charge). Each item is associated with only one billing type. When you select a service activity, only items with a billing type tied to that service activity will be available in the Item list of values.
5. Select an item.
  - o If the billing type for the item is Labor or Material, then the Quantity and UOM fields are enabled.
  - o If the billing type is Expense, then the Expense and Currency fields are enabled.
  - o You can also add fixed charge items to your work order estimate. The item must be assigned with the billing type that's defined for fixed charges.
6. Enter the required details and click **Save and Close**.
7. Each estimate line you added is created and displayed in the Estimates tab. The item price is derived from Oracle Pricing.
8. Create as many estimates as required.
9. Click on the **Amount** link to view the pricing details of the estimated amount at each line level. The Amount dialog box displays all the pricing components and adjustments from Pricing, which includes automatic adjustments, such as for subscriptions, as well as any manual adjustments that you enter. The subscription number appears so that you can research any billing discrepancies.
  - a. **Pricing Components:** Describes the break down of the price components used to calculate the price on the charge line, including subscriptions and any other adjustments.
  - b. **Unit Price:** Lists the unit price of the charge line.
  - c. **Amount:** Includes the total amount the customer will be billed for the line.
  - d. **Your Price:** Includes the total price the customer will be billed, including any pricing adjustments.
  - e. **Exclusive Tax:** Includes the estimated sales tax.  
**Note:** Service Logistics supports inclusive and exclusive taxes. Inclusive taxes are included in the list price, while exclusive taxes are a separate price component.
  - f. **Net Price Plus Tax:** Includes the sum total for **Your Price** and **Exclusive Tax** amounts.
10. You may need to edit the estimated price for items before sending the work order estimate to the customer. You may do this to include warrant coverage or other terms in the service contract with the customer. Click on the pencil icon in the Your Price column for the price that you want to adjust. In the Edit Price dialog box adjust price using the following information:.

- a. Select the adjustment type. Here are the adjustments that you can make:
    - Discount Percent
    - Discount Amount
    - Markup Amount
    - Markup Percent
    - Price Override
  - b. Enter the adjusted price amount.
  - c. Select the basis or the price element. This is the pricing entity used to calculate the price for example the list price or net price.
  - d. Select a reason for the adjustment. Seeded values include Price match, Sales negotiation, Error correction, and Other. You can add your own custom adjustment reasons while setting up Service Logistics.
  - e. Click Save and Close to save the adjustment line and close the dialog box. You can add multiple adjustment entries for a single line item. When there are multiple line entries, the price is adjusted as per the sequence of the entries.
  - f. You can also delete an entry that's not required.
11. Verify that:
- o Total Material equals the sum of all estimated material charges.
  - o Total Labor equals the sum of all estimated labor charges.
  - o Total Expenses equals the sum of all estimated expense charges.
  - o Total Fixed Charged equals the sum of all estimated fixed charges.
  - o Grand Total equals the sum of all the estimated charges.
12. You can edit an estimate line by selecting the row and clicking the **Edit** (pencil) icon. You can delete a line by selecting the row and clicking the **Delete** (X) icon.

## Ship a Repaired Part to a Customer

You can create a shipment line for a repaired part when you create a return material authorization (RMA).

When you create the return part requirement and RMA sales order line in the Service Request or Part Requirements pages, the corresponding shipment parts requirement line and sales order are also created. Use the shipment sales order line to ship the repaired part or product back to the customer, so that asset tracking makes the proper updates.

## Depot Repair Billing

Depot repair billing includes the following:

1. After completing the repair work, the depot repair technician reports the time spent on the job and the spare parts that were used or recovered.
2. The depot repair manager identifies the repair work orders that are complete and ready to be billed in the Manage Depot Repair page.

3. The depot repair manager clicks on the RMA Number link to open the Depot Repair Workbench and initiate the billing process. The depot repair manager then clicks **Create Charges**. This will create the debrief lines with charges from the parts, labor, and material expenses reported on all the repair orders that exist for the RMA line. The debrief lines created will now be visible in the Labor, Parts, and Expenses tab.
4. Note:
  - o The information in the Labor tab is read only.
  - o You can add debrief lines to report any additional expenses in the Expenses tab. You can edit and delete expense lines until the charges are posted.
  - o You can update the service activity code in the Parts tab if you want to re-price the debrief line before posting the charges.
  - o You can also add fixed charges to the depot repair work order.
5. Save your work.
6. Go to the Charges tab and review and edit the charges if required.

**Note:** Just like field service work orders, you can bill multiple parties for expenses incurred on depot repair work orders. Select the charge line and click on the Bill to Details icon to open the Bill to Details dialog box. Here you can change the default values and select a different customer, account, and bill to address.

7. When depot repair charges are created, the charges incurred on outside processing items, if any, are also included. Outside processing operation costs are stored in the purchase order tied to the maintenance work order's supplier operation. The purchase order has item and quantity received which is used to get the price from Pricing to calculate charges. You can see these outside processing items in the Parts tab and the related charges in the Charges tab.
8. Post the charges to generate a sales invoice and ship the repaired part back to the customer. Note that the sales order will have the depot repair logistics lines (RMA and shipment) as well as the repair charges (parts, labor, expenses, fixed charges).
9. Depot repair managers dealing with a large volume of work orders on a daily basis may review charges for a work order and then click the **Post Charges and Close** button and move on to the next work order. This button initiates a background job to post the charges and then close the Depot Repair Workbench.





# 8 Manage Depot Repair in the Redwood User Experience

## Overview of Depot Repair in the Redwood UX

You can search for return material authorization (RMA) lines using the Depot Repair pages in the Redwood UX.

Specifically, you can search for RMA lines based on multiple attributes, such as RMA status, debrief status, RMA number and so on.

The page automatically launches with the default filters of **RMA Status** set to Received status and **Debrief Status** set to New.

You can refine the search by adding, updating, or removing attributes as required.

To access the **Depot Repair** search page, click the **Depot Repair** link in the drawer on the right side of the Service Logistics landing page.

## Search for Depot Repair Return Material Authorizations (RMAs)

You can use the Depot Repair search page in the Redwood UX to find RMAs.

**Depot Repair**

Q Debrief Status: New X

RMA Status: Awaiting/Receiving 12 Organization: RCL\_M1 16 Requested Date: This Year 15

17 results

RMA Status	RMA Line Number	Service Request	Item	Item Description	Quantity Ordered	Requested Date	Customer	Organization
Awaiting Debriefing	SR0000080156.1	SR0000080156	RCL_PR_Serial	RCL Serialized Asset Item	1	07/07/23	FIRST SOFTWARE	RCL_M1
Open	SR0000079158.1	SR0000079158	RCL_WD_Serial	RCL Serialized Asset Item used for SR	1	07/07/23	BIG COFF	RCL_M1
Open	SR0000078158.2	SR0000078158	RCL_PR_Serial	RCL Serialized Asset Item	1	05/07/23	FIRST SOFTWARE	RCL_M1
Awaiting Debriefing	SR0000074157.2	SR0000074157	RCL_A554888	RCL A554888 Desc	1	27/06/23	FIRST SOFTWARE	RCL_M1

**Prerequisite:** In order to use the elastic search on the Depot Repair search page, you may need to confirm that the **ESS job to create index definition and perform initial ingest to OSCS** has been run with the following input parameter: `fascm-depotsearch`

**Note:** You only need to run this job once when you first set up and configure the environment.

The Depot Repair search page includes the:

- Search bar
- Filter Chips suggestions bar
- Magnifying Glass icon
- RMA Lines results table

These are described in the following table:

### Depot Repair Search

Field Name	Description
Search bar	<p>The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include:</p> <ul style="list-style-type: none"> <li>• Debrief Status (LOV)</li> <li>• RMA Status (LOV)</li> <li>• Organization (LOV)</li> <li>• Requested Date (range)</li> </ul> <p>By default, the search page lists lines that include transactions in the following statuses:</p> <ul style="list-style-type: none"> <li>• RMA Status: Received</li> <li>• Debrief Status: New</li> </ul> <p>You can also enter free text, which will search the following RMA attributes:</p> <ul style="list-style-type: none"> <li>• RMA</li> <li>• Service Request</li> <li>• Item</li> <li>• Description</li> <li>• Customer</li> <li>• Organization</li> </ul> <p>Because the application supports autocomplete and fuzzy logic, you can partially type your search terms.</p> <p>The following attributes support autocomplete:</p> <ul style="list-style-type: none"> <li>• Item</li> <li>• Description</li> <li>• Customer</li> </ul> <p>The following attributes support fuzzy logic:</p> <ul style="list-style-type: none"> <li>• Description</li> <li>• Customer</li> </ul>
Filter Chips suggestions bar	<p>The filter chips appear under the Search bar and provide suggestions for filtering your results set. For example, you might see a filter suggestion for a date range for the RMA's requested date. You can select this filter chip to filter your results.</p> <p>When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the results table.</p>

Field Name	Description
Magnifying Glass icon	<p>You can use the Magnifying Glass icon to filter your results based on seeded filter chips and their associated values. Specifically, the magnifying glass shows filter chips with preselected values. Some examples are:</p> <ul style="list-style-type: none"> <li>• RMA Status: Awaiting Billing</li> <li>• Debrief Status: New</li> <li>• Organization: RCL_M1</li> <li>• Requested Date: This quarter</li> </ul>
RMA Lines results table	<p>The RMA Lines results table lists the RMAs based on your search criteria and filters. You can also sort your results by selecting the arrows next to the column headers. When you first open the page, the RMAs are sorted by the RMA line number.</p> <p>From the search results, you can navigate to the details pages. To view details:</p> <ul style="list-style-type: none"> <li>• Click an <b>RMA Line Number</b> link for the Depot Repair details page.</li> <li>• Click a <b>Service Request</b> link for Service Request details page.</li> </ul>

## Manage Repair Orders from the Depot Repair Page

You can access the Depot Repair workbench in the Redwood UX to manage the repair and return of RMA lines.

**Note:** In the Redwood UX, a repair order can be created for any RMA status.

### Use the Depot Repair Page

To access and use the Depot Repair page:

1. To open the Depot Repair page, click the **RMA Line Number** link from the Depot Repair search results.
2. To open the Service Request page, click the **Service Request** link to navigate to the Service Request page.
3. To view or edit the Depot Repair details:
  - Unposted debrief: Click **Edit Details** to update details such as account, bill-to address, the purchase order, and your descriptive flexfields information in the Depot repair details drawer.
  - Then, click **Update**.
  - Posted debrief: Click **View Details** to open the Depot repair details drawer and view the debrief details.
4. In the Logistics region, click **Create Transfer Order** to move the returned parts and products through the repair supply chain.
 

**Note:** You can click **Refresh** to refresh the Logistics region.
5. In the Assets region, click the **Asset Number** link to open the associated asset's detail page.

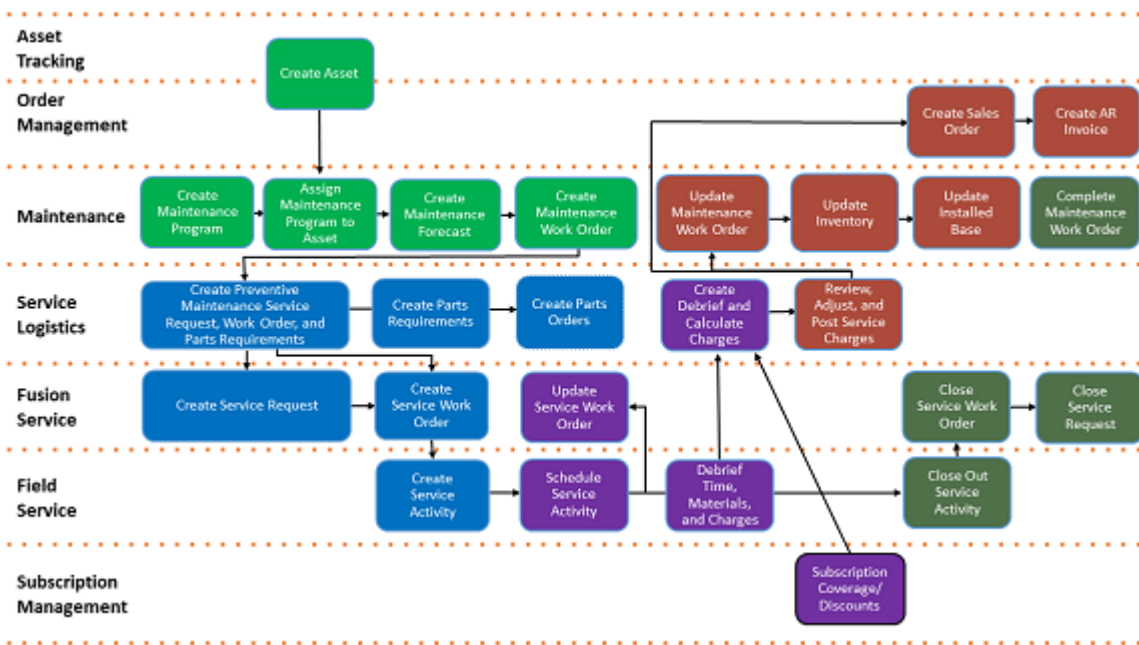
6. In the Repair Orders region:
  - o Click **Create Repair Order** to create or cancel a repair work order required for a returned asset.
    - Note:** You can capture project-related details using descriptive flexfields (DFF) in a project-enabled organization if the DFF is set up.
  - o Click the **Work Order** link to open the associated work order's detail page.
7. In the Charges region:
  - o Click **Create Charges** to import debrief charges associated with repair orders.
  - o Click **Add Charges** to add or delete debrief charges associated with repair orders.
    - Note:** You can also use the delete icon in charges region.
  - o Click **Post Charges** to post charges for a single repair order.
  - o Click **More Actions** to perform pricing-related actions like changing currency or repricing.
  - o Click the **Your Price** link or the **Amount** link to edit prices and amounts for charge lines.
8. Click the **Your Price** link and the **Amount** link to view the pricing details of the estimated amount at each line level. The **Review Charge Amount** drawer displays all the pricing components and adjustments from Pricing, which includes automatic adjustments, such as for subscriptions, as well as any manual adjustments that you enter. The subscription coverage and subscription number appear, so that you can research any billing discrepancies.
  - a. **Pricing Components:** Describes the breakdown of the price components used to calculate the price on the charge line, including subscriptions and any other adjustments.
  - b. **Unit Price:** Lists the unit price of the charge line.
  - c. **Amount:** Includes the total amount the customer will be billed for the line.
  - d. **Your Price:** Includes the total price the customer will be billed, including any pricing adjustments.
  - e. **Exclusive Tax:** Includes the estimated sales tax.
    - Note:** Service Logistics supports inclusive and exclusive taxes. Inclusive taxes are included in the list price, while exclusive taxes are a separate price component.
  - f. **Net Price Plus Tax:** Includes the sum total for **Your Price** and **Exclusive Tax** amounts.
9. In the header region, click **Post Charges and Close** to post all the charges associated with one RMA line number.

# 9 Manage Preventive Maintenance Work Orders

## Overview of Preventive Maintenance Tasks for Customer Assets

You can use Maintenance, Service Logistics, Fusion Service, Field Service, and Order Management to maintain customer assets, as depicted in the following diagram:

### Field Service Preventive Maintenance Process



The tasks in this diagram make up the following processes:

- Create maintenance work orders.
- Create service requests and field service work orders.
- Order, ship, and receive required parts.
- Perform maintenance and debrief (parts, labor, and expenses).
- Post charges and generate invoices.
- Close service requests and work orders.

These task and processes are described in detail in this chapter.

*Related Topics*

- [Create Maintenance Work Orders](#)
- [Create Service Requests and Field Service Work Orders](#)
- [Order, Ship, and Receive Required Parts](#)
- [Perform Maintenance and Debrief \(Parts, Labor, and Expenses\)](#)
- [Post Charges and Generate Invoices](#)
- [Close Service Requests and Work Orders](#)
- [Set Up Field Service Preventive Maintenance](#)
- [Create Service Work Orders for Preventive Maintenance](#)

## Create Maintenance Work Orders

Use the following tasks to create maintenance work orders:

Task	Application	Who or what initiates this task?	Description
Create Asset	Asset Tracking/Order Management	When products are sold/shipped in Order Management assets are created.  You can also create them manually in the UIs, or by using data loads from legacy systems.	Create assets.
Create Maintenance Program	Maintenance	Usually created by maintenance or product engineering.	Create maintenance programs for each product that needs maintenance.
Assign Maintenance Program to Asset	Maintenance	Usually created by maintenance or product engineering.	Assign a maintenance program to your customer assets.
Create Maintenance Forecast	Maintenance	Usually created by maintenance or product engineering.	Create a forecast of planned maintenance for each of your customer assets.
Create Maintenance Work Orders	Maintenance	Usually created by field service planning or dispatchers.	Create a maintenance work order for your service planning horizon.

# Create Service Requests and Field Service Work Orders

Use the following tasks to create service requests and field service work orders:

There are two ways to create the Preventive Maintenance service requests and work orders. There's an ESS job named Create Service Work Orders for Preventive Maintenance and an Oracle Integration Cloud (OIC) solution named Service Logistics Preventive Maintenance. Both processes have the same input parameters, as follows:

## Input Parameters (same for ESS job and OIC)

- Maintenance Organization: Used to retrieve Preventive Maintenance maintenance work orders (MWOs).
- Service Request Category: Used to create Preventive Maintenance service requests.
- Create Work Order: Used to create field service work orders, generic or from Oracle Field Service Cloud.
- Work Order Type: Used to create field service work orders.
- Work Order Status: Used to create field service work orders. You can select the Submitted, Scheduled, or Started status.

## Tasks

Task	Application	Who or what initiates this task?	Description
Create Preventive Maintenance Service Request, Work Order, and Parts Requirements	Service Logistics	Usually created by field service planning or dispatchers.  <b>Note:</b> Refer to the Service Request Creation for Preventive Maintenance and the Fusion Service - Work Order Creation for Preventive Maintenance sections that follow.	Create preventive maintenance service requests, work orders, and parts requirements from an asset's Preventive Maintenance MWOs.
Create Part Orders	Service Logistics	Usually done by a service planner/dispatcher, a field service administrator, or a parts coordinator.	Order the parts required for your preventive maintenance work orders using the Service Logistics Manage Part Requirements page.
Create Field Service Activity	Fusion Service	OIC integration automatically creates the field service activity.	Create a service activity to initiate the planning and execution of the required maintenance.

## Service Request Creation for Preventive Maintenance

This table shows how the Create Service Work Orders for Preventive Maintenance ESS job or the Service Logistics Preventive Maintenance Oracle Integration Cloud (OIC) solution - create service requests. Most of the attributes come from the maintenance work order (MWO) that drives this process.

### Service Request Creation

Service Request Attributes	How is each service request attribute populated?
Title	<ol style="list-style-type: none"> <li>1. Work definition name comes from MWO.</li> <li>2. If the MWO doesn't have a work definition (for example, if it's created from multiple merged work definitions), Service Logistics uses the MWO's Preventive Maintenance program name.</li> </ol>
Primary Contact Party ID	<ol style="list-style-type: none"> <li>1. Contact from asset</li> <li>2. Asset customer's preferred contact</li> </ol>
Problem Description	<ol style="list-style-type: none"> <li>1. MWO work definition description</li> <li>2. MWO description</li> </ol>
Category ID (Service Request Category)	ESS/OIC input parameter
Inventory Item ID	MWO inventory item
Source ID (where the service request originated)	Null
Account Party ID	MWO asset customer
Install Base Asset ID	MWO asset

## Work Order Creation for Preventive Maintenance

This table shows how the Create Service Work Orders for Preventive Maintenance ESS job or the Service Logistics Preventive Maintenance Oracle Integration Cloud (OIC) solution creates field service work orders for the service request that it just created. Most of the attributes come from the maintenance work order (MWO) that drives this process.

### Generic and Field Service Work Order Creation

Work Order Attributes	How is the generic work order created?	How is the Field Service work order created?
Title	Service request title from the service request	Service request title from the service request
Service Request ID	Service request ID from the service request	Service request ID from the service request



Work Order Attributes	How is the generic work order created?	How is the Field Service work order created?
Work Order Type	ESS/OIC input parameter	ESS/OIC input parameter
Work Order Status	ESS/OIC input parameter	ESS/OIC input parameter
Install Base Asset ID	MWO asset	MWO asset
Account Party ID	MWO asset customer	MWO asset customer
Contact Party ID	<ol style="list-style-type: none"> <li>1. MWO asset contact</li> <li>2. MWO asset customer's preferred contact</li> </ol>	<ol style="list-style-type: none"> <li>1. MWO asset contact</li> <li>2. MWO asset customer's preferred contact</li> </ol>
Contact Name	Contact party name	Contact party name
Contact Email	Contact party email	Contact party email
Contact Phone Number	Contact party phone number	Contact party phone number
Service Address ID	Null	Null
Address1.. Address4, City, County, Postal Code, State, Province, Country	MWO asset location ID is used to retrieve the address components from the TCA Locations table (HZ_Location table).	MWO asset location ID is used to retrieve the address components from the TCA Locations table (HZ_Location table).
Time Zone Code	<ul style="list-style-type: none"> <li>• <b>ESS job</b> <ol style="list-style-type: none"> <li>a. MWO asset location (HZ_Location) time zone</li> <li>b. FND Time Zone profile option</li> </ol> </li> <li>• <b>OIC</b> <ol style="list-style-type: none"> <li>a. MWO asset location (HZ_Location) time zone</li> <li>b. Coded value in the OIC</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>ESS job</b> <ol style="list-style-type: none"> <li>a. MWO asset location (HZ_Location) time zone</li> <li>b. FND Time Zone profile option</li> </ol> </li> <li>• <b>OIC</b> <ol style="list-style-type: none"> <li>a. MWO asset location (HZ_Location) time zone</li> <li>b. Coded value in the OIC</li> </ol> </li> </ul>
Work Order Area (not a required field)	Null	<p>ESS job calls the Fusion Service REST API (svcWOarea) to get the work area:</p> <p>Inputs:</p> <ul style="list-style-type: none"> <li>• Postal Code</li> <li>• Time Zone Code</li> <li>• Country Code</li> </ul>

Work Order Attributes	How is the generic work order created?	How is the Field Service work order created?
		<ul style="list-style-type: none"> <li>Work Order Type (Create Service Work Orders for Preventive Maintenance ESS job input)</li> </ul> <p>Outputs: WO Area (string)</p> <p><b>OIC</b> calls the Fusion Service REST API (svcWOarea) to get the Work Area.</p> <p>Inputs: (configurable by customer)</p> <ul style="list-style-type: none"> <li>Postal Code</li> <li>Time Zone Code</li> <li>Country Code</li> <li>Work Order Type (OIC input)</li> </ul> <p>Outputs: WO Area (string)</p> <p><b>Note:</b> If the svcWOarea API doesn't return a value, Service Logistics can still create the Oracle Fusion Service work order. In this case, you must create an after trigger in Oracle Application Composer that populates the work order area, so that a corresponding activity can be created in Oracle Field Service.</p>
Resolution Due Date	MWO planned completion date	MWO planned completion date

## Order, Ship, and Receive Required Parts

The Service Logistics program that creates preventive maintenance service requests and field service work orders also creates part requirements, but it doesn't create the corresponding transfer orders or reservations.

Field service administrators must use the Manage Part Requirements page to query up these part requirements and then create the transfer orders and reservations. Then, a parts coordinator must use Inventory Management and Shipping to ship the parts to the customer or technician address.

- For generic work orders, the transfer orders are received in the Service Logistics Receiving page.
- For Field Service Cloud work orders, the transfer orders are received in the OFSC UI or in the Service Logistics Receiving UI.

## Perform Maintenance and Debrief (Parts, Labor, and Expenses)

Use the following tasks to perform maintenance and debrief (parts, labor, and expenses):

Task	Application	Who or what initiates this task?	Description
Schedule Service Activity	Field Service	field service dispatcher	Schedule the service activity.
Perform Maintenance	NA	field service technician	The field service technician performs the maintenance.
Debrief Time, Materials, and Expenses	Field Service	field service technician	Debrief the time, materials, and expenses that were used to complete the service activity.
Upload Debrief and Calculate Charges	Service Logistics	OIC integration and Service Logistics APIs.	Create the debrief and calculate the charges using pricing and subscription coverage.

**Note:** The subscription coverage and discounts that are used when calculating charges are managed in Subscription Management.

## Post Charges and Generate Invoices

After you post charges the Post Charges program updates the maintenance work orders, inventory, installed base, and creates the sales order and AR invoice.

Task	Application	Who or what initiates this task?	Description
Review and Adjust Service Charges	Service Logistics	field service administrator	Review and adjust service charges.
Post Service Charges	Service Logistics	Post Charges program	<ul style="list-style-type: none"> <li>Update the maintenance work order (MWO). This is the original MWO that initiated the creation of the service</li> </ul>

Task	Application	Who or what initiates this task?	Description
			<p>request and the work order in Fusion Service.</p> <ul style="list-style-type: none"> <li>• Create inventory transactions on the maintenance work order.</li> <li>• Use the maintenance work order inventory transactions to update the installed base.</li> <li>• Create a bill-only sales order.</li> <li>• Create an invoice (Order Management Distributed Order Orchestration).</li> </ul>

## Close Service Requests and Work Orders

Use the following tasks to close service requests and work orders:

Task	Application	Who or what initiates this task?	Description
Close Out Service Activity	Field Service	field service technician	Close the service activity.
Close Service Work Order	Fusion Service	OIC integration	Close the service work order.
Close Service Request	Fusion Service	field service administrator	Close the service request in the Service Request page or by Groovy script.
Complete Maintenance Work Order	Maintenance	field service administrator	Complete the maintenance work order in the Manage Maintenance Work Orders page.

# 10 Manage Field Parts Inventory

## Overview of Managing Field Service Parts

Use the Manage Field Parts Inventory page to manage field parts inventory 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, you can use this page to:

- Transfer parts to stocking locations (subinventories) set up in the Manage Stocking Locations page.
- Return defective, unused, and excess parts back to the central or regional warehouse.

As a field service technician, you can use this page to:

- Transfer and return parts to subinventories assigned to you.

## Transfer Field Service Parts

To transfer parts to another stocking location:

1. In the Manage Field Parts Inventory page, search for the item or part that you want to transfer.
  - If you're a field service administrator who's transferring parts from a technician's trunk stock, specify the technician name.
  - If you're a field service technician, you can only transfer parts from the organization and subinventories assigned to you.
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 select **Transfer**.
4. In the Transfer Part window, select the destination stocking location. The list of values displays all inventory organizations with a subinventory set up in the Manage Stocking Locations page. If you're transferring to a technician's trunk stock, you must select the technician first. In that case, all organizations with subinventories assigned to the technician appear. Field service technicians using this page only see the stocking locations assigned to them.
5. The **Type** field defaults based on the **Destination Organization** you select, such as **Direct Organization Transfer** or **Intransit Shipment**.  
**Note:** If you define valid types for the transaction source in the Manage Inventory Transaction Sources and Types page, then the LOV includes other values.
6. For an Intransit transaction, enter a shipment number in the **Shipment** field or click on the **Generate Shipment Number** to generate one.
7. For serial controlled items, select the serial number of the item. For items that aren't serial controlled, you must enter the quantity.

8. Click **Transfer** to initiate the parts transfer.

To return defective, unused, and excess parts to the appropriate warehouse, see the section [Route and Return Field Service Parts](#).

#### *Related Topics*

- [Route and Return Field Service Parts](#)

## Receive Parts

Field service administrators can receive parts into a technician's trunk stock or field parts stocking locations to ensure that service parts are on hand to support field service operations.

You can receive:

- Single shipments or multiple shipments into the destination subinventory.
- Intransit shipments by searching for the shipment number or other search attributes.

If you're a field service technician, you can access this page to receive parts into your own trunk stock.

1. On the [Receive Parts](#) page, select the destination organization. You can select any inventory location set up in the [Manage Stocking Locations](#) page when querying inbound transfer orders.
  - If you're a field service administrator who's 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.
  - If you're a field service technician, you will only be able to select the organization and subinventory assigned to you.
2. To find all inbound transfer orders for a specific service work order or third-party work order, you can enter a number in the **Work Order** field.
3. If you don't want to receive the parts into the default subinventory of the technician, select an alternative destination subinventory.
4. Search for a specific inbound transfer order using the transfer order number or shipment number. To view a list of all transfer orders for the selected destination organization, search without entering these parameters.
5. Enter the quantity of the item that you want to receive. You can receive the entire shipment or a part of the shipment.
6. Click **Receive Selected Lines**.
7. You can navigate to the [Manage Field Parts Inventory](#) page to check that the on-hand quantity of the parts received.

# 11 Report and Analyze

## Overview of Oracle Transactional Business Intelligence (OTBI)

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

- **Service Parts Profitability:** Analyze parts sales, parts costs, returns, exchanges, and replacements created in the Fusion Service, Service Request page or in the Service Logistics Manage Parts Requirements page.
- **Parts Fulfillment Performance:** Analyze parts delivery performance for both customer service sales orders (parts sales, exchanges, returns) and field service parts transfer orders.
- **Debrief and Charges Profitability:** Analyze profitability for service work orders by work area, product line, product, asset or serial number and individual field technician. You can analyze both types of service work orders: Generic and Oracle Field Service Cloud. You can identify work orders that are completed and ready for invoicing, as well as work orders with billing errors that need attention. You can also generate revenue reports for charges posted against service work orders.

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

Service Parts Profitability reports:

- What is the revenue of parts sales?
- How profitable were parts sales?
- Did we make or lose money on part exchanges?
- What is the revenue and profits for each part category?
- How much core credit was issued?

Parts Fulfillment Performance reports:

- How often did customer-ordered parts arrive on time?
- How often did field-service ordered parts arrive on time?

Debrief and Charges Profitability reports:

- How profitable are field service work orders?
- How profitable is each type of field service work order?
- Which work areas were most profitable?
- Find work orders completed but not invoiced.
- How many work orders have debrief errors?
- How profitable is each product category?
- How many manual adjustments were made to field service charges?

# Create Reports Using Oracle Transactional Business Intelligence (OTBI)

Oracle Transactional Business Intelligence (OTBI) provides predefined analytics and reports that help you 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 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 guide *Creating and Administering Analytics and Reports for SCM*.

To navigate to the subject areas for Service Logistics:

1. In the Navigator, click **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 three subject areas for Service Logistics:
  - o Service Logistics: Parts Fulfillment Performance Real Time
  - o Service Logistics: Service Parts Profitability Real Time
  - o Service Logistics: Debrief and Charges Profitability Reporting Real Time
5. Click 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.

You can create new reports using these subject areas or add them to your existing reports.