

SCM Cloud

Using Service Logistics

26D



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26D

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In addition to the resources available in Oracle Help Center, you can explore training, connect with the Oracle community, and share your feedback.

Get Training

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Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 Overview

Features

Oracle Fusion Service Logistics is a cloud solution in 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 might 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 help desk 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.
- Start 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 page 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 application 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 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 and 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'll 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 pretransformation 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, decide shipping methods and carriers, and calculate the arrival date.

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

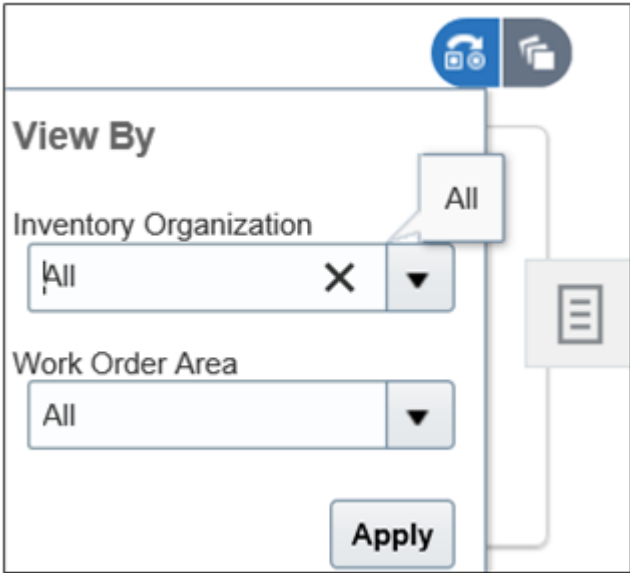
When you first access the Service Logistics application, you see the landing page. The Service Logistics landing page displays key metrics that help you review and complete tasks.

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 might 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.

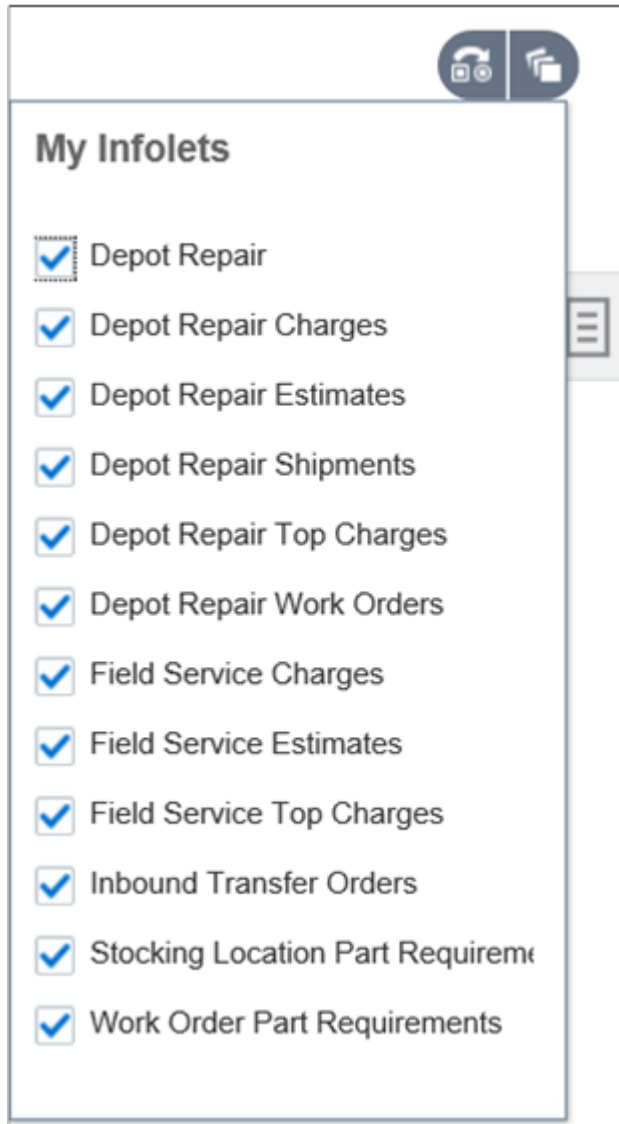
The following screenshot highlights the View By page:



Fields	Description
Inventory Organization	Select All or a single inventory organization from the Inventory Organization list. If you've: - Field Service Administration privileges, the inventory organizations set up in the Service Logistics Manage Stocking Location page appear. - Depot Repair Manager privileges, the maintenance organizations appear. - Both privileges, a combined list of the organizations appears.
Work Order Area	Select All or a single work order area from the Work Order Area list.
Apply	Select Apply 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 checkbox. The infolets that you see on this list are limited by your privileges.

The following screenshot displays the My Infolets page:



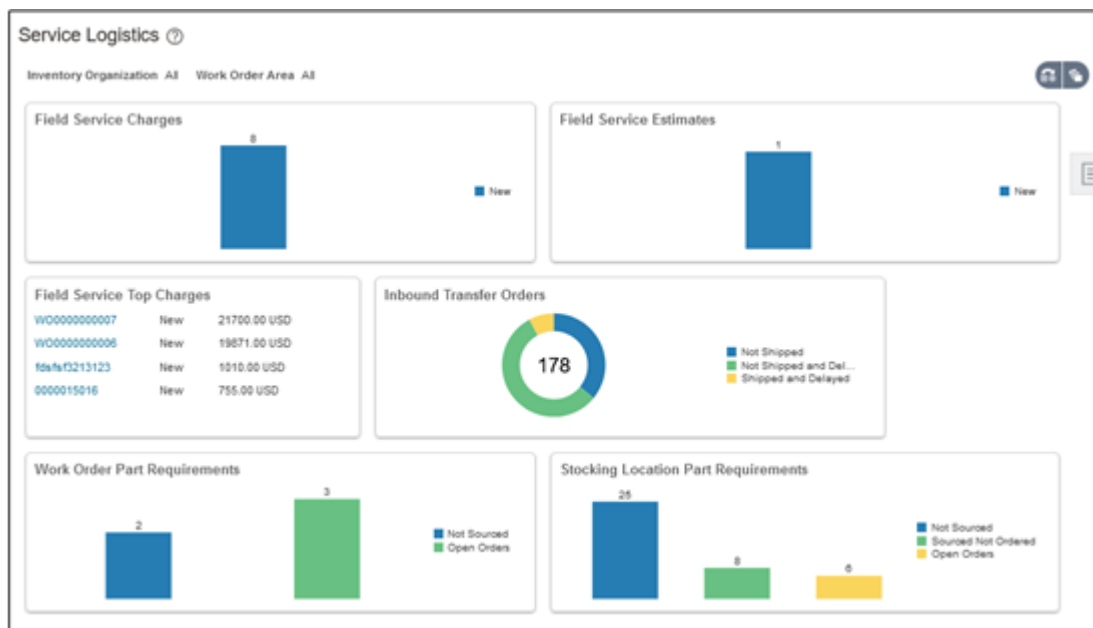
The infolets listed are described in the sections that follow.

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.

The following screenshot displays the landing page for field service administrators:



The following table describes the infolets and icons on the landing page:

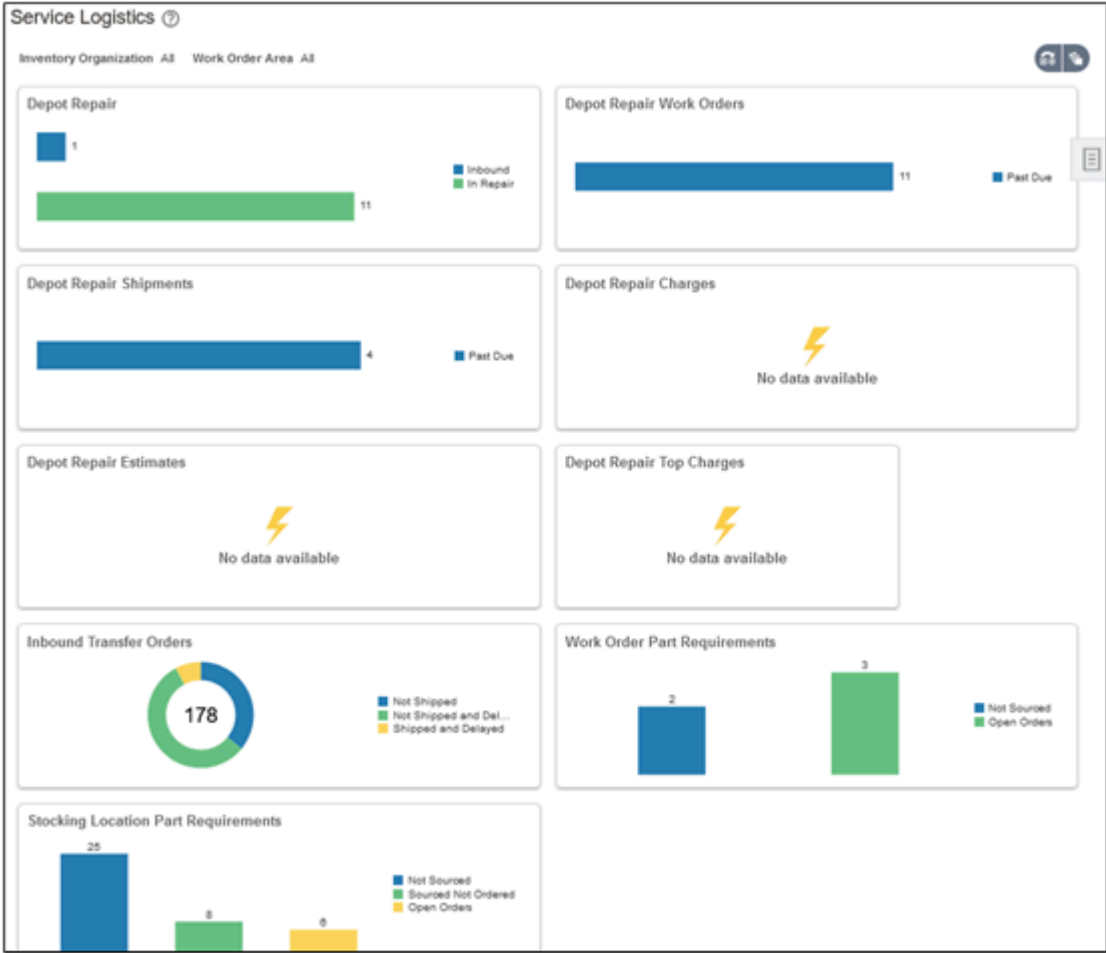
Infolet/Icon	Description
Field Service Charges	View simple statistics about field service debriefs, such as the number of debrief headers in New status, Needs Review status, and in Error status. Data is filtered by the work area. Select a number to go to the Manage Work Orders and Charges page and see 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 is filtered by the inventory organization to view estimates for depot repair work orders. To filter, select 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 is filtered by the work area. Select 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. Select 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 is filtered 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	Select a work area, an inventory organization, or both. This refreshes the screen and filters the data based on your selection. The values you select filter the following infolets: • Field Service Charges • Field Service Charges by Status • Field Service Top Charges • Field Service Estimates • Work Order Part Requirements
My Infolets icon	Select to display a list of infolets available for this page. Hide or show infolets from view, by selecting the infolet's checkbox.
Tasks icon	Select to display the slide-out navigation panel. Use the navigation panel to access activities you perform often. 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.

Service Logistics Landing Page for Depot Repair Managers

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

The following screenshot displays the landing page for depot repair managers:



The following table describes the infolets and icons on the landing page:

Infolet/Icon	Description
Depot Repair	View a bar chart displaying a count of depot repair work orders, RMAs, and shipment order lines for each depot repair lifecycle status. There's a nonextensible 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 with a depot repair RMA. The depot repair lifecycle statuses are: Inbound: Incoming depot repair RMAs that have a fulfillment line in Awaiting Receiving status. Received: Received the depot repair sales order lines for the RMA without an associated depot repair work order. In Repair: Depot repair work orders in the Unreleased, Released, or On Hold status. To Be Shipped: 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. To Be Billed: 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.

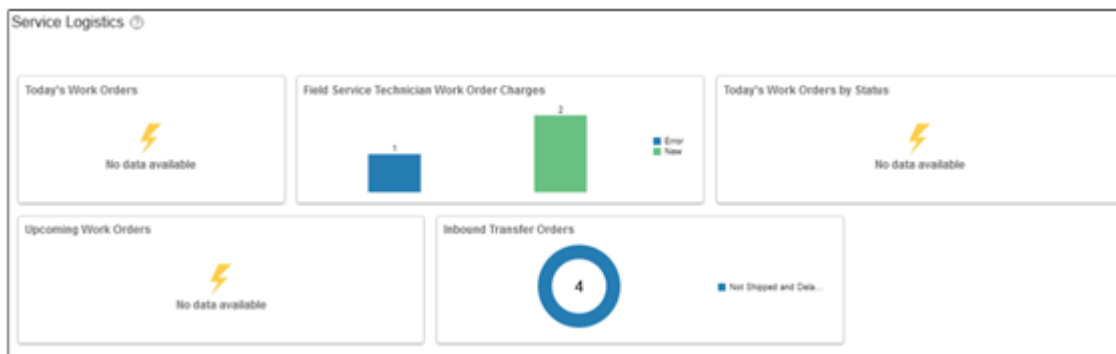
Infolet/Icon	Description
	Shipped Not Billed: Depot repair work orders in the Canceled, Closed, or Completed status and a sales order shipment line's fulfillment that's in the Awaiting Billing status. The counts in this infolet are filtered by the inventory organization that you select on the landing page filter. Select any status in the bar chart to go to the Manage Depot Repair page that displays all 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.
Depot Repair Work Orders	View bar chart of counts for depot repair work orders in the Unreleased, Released, or On Hold status. They're 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 is filtered by the inventory organization on the repair work order. Select 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. Because an RMA can have multiple work orders, the number of work orders shown in the infolet might 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 is filtered by the inventory organization of the shipment order line. Select any bar to open the Manage Depot Repair page which displays the Depot Repair RMAs associated with 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. Select a number to open the Manage Depot Repair page to see the underlying RMAs.
Depot Repair Estimates	View a count of all estimates associated with Depot Repair RMAs that are in the Pending Approval or New status. RMAs filter by the inventory organization selected for the landing page. Select 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. Select a RMA number to open the Depot Repair page.
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 is filtered by the transfer order destination inventory organization.
View By icon	Select a work area, an inventory organization, or both. This refreshes the screen and filters the data based on your selection. The values you select filter the following infolets: • Depot Repair • Depot Repair Work Orders • Depot Repair Shipments • Depot Repair Charges • Depot Repair Estimates • Depot Repair Top Charges • Inbound Transfer Orders
My Infolets icon	Select to display a list of infolets available for this page. Hide or show infolets from view, by selecting the infolet's checkbox.

Infolet/Icon	Description
Tasks icon	Select to display the slide-out navigation panel. Use the navigation panel to access activities you perform often. 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 act.

The following screenshot displays the landing page for field service technicians:



The following table describes the infolets and icons 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. Select 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 in Error. The count of charges that must be reviewed by the field service administrator appears in Needs Review. Select 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. Select 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. Select 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.

Service Logistics Landing Page in the Redwood User Experience

When you first access this Service Logistics landing page, you'll see key metrics you can use to review and complete your tasks.

To access this landing page:

The `ORA_RCL_LANDING_PAGE_REDWOOD_ENABLED` profile must be set to Yes.

You'll also need privileges that are associated with the Field Service Administrator, Field Service Technician, and Depot Repair Manager roles:

Note: Predefined job roles such as the Field Service Administrator, Field Service Technician, and Depot Repair Manager have corresponding privileges, which are used to create unique job roles.

The following privileges provide access to this landing page:

- Update OTBI Layout for Service Logistics Landing Page (`RCL_CONFIGURE_OTBI_REPORTS_LANDING_PAGE_PRIV`)
- Access the Service Logistics Redwood Landing Page (`RCL_REDWOOD_LANDING_PAGE_PRIV`)
- Access Depot Repair KPI for Depot Manager (`RCL_RMA_DEPOT_KPI_PRIV`)
- Access Estimates in Progress KPI for Depot Manager (`RCL_ESTIMATES_SUMMARY_DEPOT_KPI_PRIV`)
- Access Estimates in Progress KPI for Field Service Technician (`RCL_ESTIMATES_SUMMARY_TECH_KPI_PRIV`)
- Access Estimates Summary KPI (`RCL_ESTIMATES_SUMMARY_PRIV`)
- Access Work Order Charges by Status KPI (`RCL_WORK_ORDER_CHARGES_STATUS_PRIV`)
- Access Work Orders Ready to Post KPI for Field Service Technician (`RCL_WORK_ORDER_CHARGES_STATUS_FSTECH_PRIV`)

See the Getting Started with Service Logistics Implementation guide for descriptions of profile options and privileges.

Work Order Area

When you open this landing page, your work order area is decided by the `RCL_DEF_WORK_ORDER_AREA` profile option. You can change it by selecting the **View By** button and accessing the drawer.

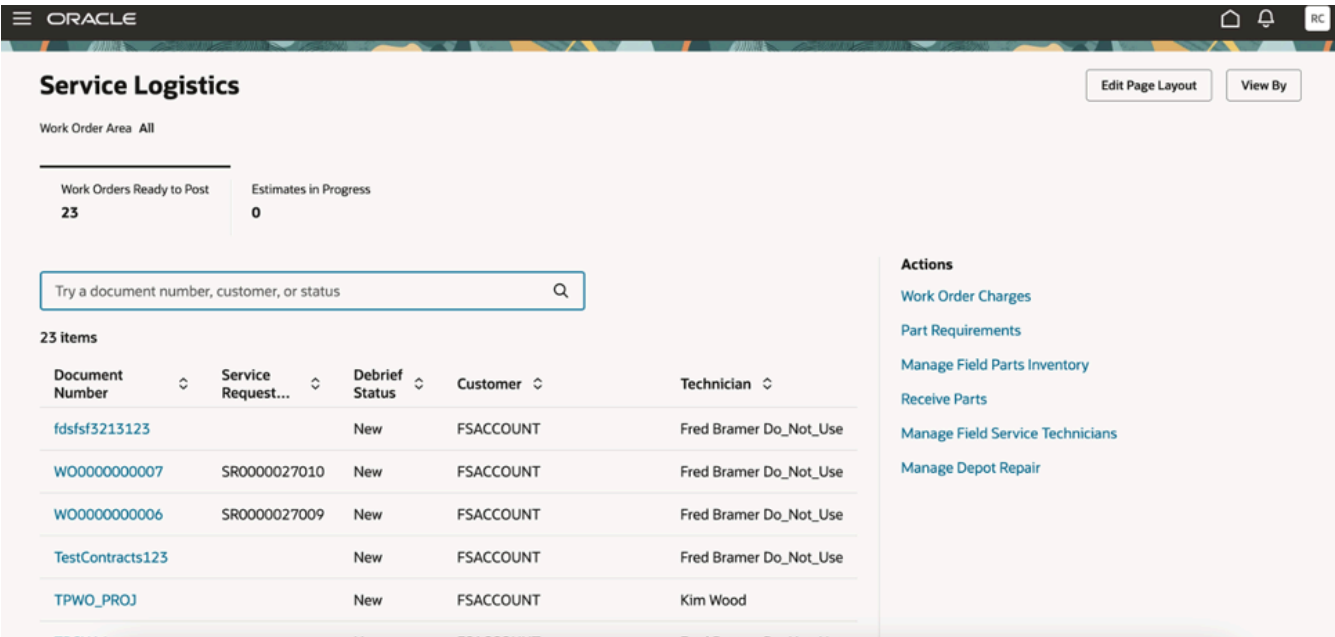
Key Performance Indicators

You'll also see counts for the work orders that are ready to post, estimates in progress, and depot repairs in progress. The KPI tabs you see will depend on your access.

Select one of the Key Performance Indicator (KPI) tabs on the landing page.

1. **Work Orders Ready to Post:** This tab displays the total number of work orders, including service work orders and third-party work orders that aren't posted. Each work order is listed individually.

Service Logistics Landing Page - Work Orders Ready to Post Tab (Redwood)



- a. Filter the work order by entering a document number, a customer number, or status in the search bar and selecting Enter.
- b. Select a work order Document Number link to go to the work order charges detail page for review and further actions.
- c. Select View By to filter the work orders ready to post by Work Order Area.

Work Orders Ready to Post

Field	Description
Document Number	Select the Document Number link to go to the work order details page.
Service Request Number	View the service request number for the associated work order.
Debrief Status	View the debrief status for the work order, such as New, Needs Review, or Error, and so on.
Customer	View the customer for the work order.
Technician	View the technician who's assigned to the work order.

2. **Estimates in Progress:** This tab displays the total number of estimates in progress for work orders or RMAs, depending on your access. This includes all estimates that don't have an approved or canceled status.

Note: If you've privileges that are associated with both the Field Service Technician role and Depot Manager role, then you'll see a combined view of KPIs on the landing page. Otherwise, you'll see estimates for either work orders or depot repairs.

Service Logistics Landing Page- Estimates in Progress Tab (Redwood)

The screenshot shows the Oracle Service Logistics interface. At the top, there's a navigation bar with the Oracle logo and user information. Below it, the 'Service Logistics' header is visible. The main area displays three KPI cards: 'Work Orders Ready to Post' (41), 'Estimates in Progress' (7), and 'Depot Repairs in Progress' (90). Below these cards is a search bar with the placeholder text 'Try an estimate number, document number, or customer'. Under the search bar are three tabs: 'Estimate Status', 'Estimate Type', and 'Document Type'. A table lists several estimates with columns for Estimate Number, Estimate Status, Estimate Type, Document Type, Document Number, and Customer. To the right of the table is an 'Actions' sidebar with links for Estimates, Work Order Charges, Part Requirements, Field Parts Inventory, Depot Repair, and Receive Parts.

Estimate Number	Estimate Status	Estimate Type	Document Type	Document Number	Customer
1 - 1	Draft	Binding	Third Party Work Order	TP100	FSACCOUNT
11 - 1	Draft	Binding	Return Material Authorization	SR0000070153.1	FSACCOUNT
13 - 1	Draft	Not To Exceed	Third Party Work Order	TP WO 103	FSACCOUNT
17 - 2	Draft	Nonbinding	Service Work Order	0000010009	FSACCOUNT
3 - 2	Draft	Not To Exceed	Third Party Work Order	TPWO100	FSACCOUNT
3 - 1	Draft	Not To Exceed	Third Party Work Order	TPWO100	FSACCOUNT

- Filter the estimate by entering an estimate number, a document number, or customer in the search bar, and selecting Enter.
- Select an Estimate Number link to view an estimate's details page.

Estimates in Progress

Field	Description
Estimate Number	Select the Estimate Number link to go to the estimate details page. This number also includes the version.
Estimate Status	View the status for the estimate, such as Draft, In-review, Pending Approval, and so on. Canceled or Approved aren't used for estimate statuses.
Estimate Type	View the type of estimate, such as Binding, Nonbinding, or Not to Exceed.
Document Type	View the type of document for the estimate.
Document Number	View the document number for which the estimate has been created.

Field	Description
Customer	View the customer for whom the estimate has been created.

3. **Depot Repairs in Progress:** This tab displays the total number of RMAs that don't have associated debriefs in Posted status.

Service Logistics Landing Page- Depot Repairs in Progress Tab (Redwood)

The screenshot shows the Oracle Service Logistics interface. At the top, there's a navigation bar with the Oracle logo and user information. Below it, the 'Service Logistics' header is visible. The main content area shows three tabs: 'Work Orders Ready to Post' (41), 'Estimates in Progress' (7), and 'Depot Repairs in Progress' (90). The 'Depot Repairs in Progress' tab is selected. Below the tabs, there's a search bar with the placeholder text 'Try an RMA line number, status, customer, or organization'. Below the search bar, there are two buttons: 'Debrief Status' and 'Customer'. Below these buttons, there's a table with 90 items. The table has five columns: 'RMA Line Number', 'RMA Status', 'Organization', 'Customer', and 'Debrief Status'. The table shows five rows of data. The first row has RMA Line Number 'VM1234.4', RMA Status 'Closed', Organization 'RCL_M1', Customer 'FSACCOUNT', and Debrief Status 'New'. The second row has RMA Line Number 'VM1234.4', RMA Status 'Not Started', Organization 'RCL_M1', Customer 'FSACCOUNT', and Debrief Status 'New'. The third row has RMA Line Number 'VM1234.1', RMA Status 'Closed', Organization 'RCL_M1', Customer 'FSACCOUNT', and Debrief Status 'New'. The fourth row has RMA Line Number 'SR000083158.1', RMA Status 'Awaiting Billing', Organization 'RCL_M1', Customer 'FSACCOUNT', and Debrief Status 'New'. The fifth row has RMA Line Number 'SR000083158.1', RMA Status 'Awaiting Billing', Organization 'RCL_M1', Customer 'FSACCOUNT', and Debrief Status 'New'. On the right side of the page, there's an 'Actions' menu with links to 'Estimates', 'Work Order Charges', 'Part Requirements', 'Field Parts Inventory', 'Depot Repair', and 'Receive Parts'.

- Filter the RMA by RMA line number, status, customer, or organization.
- Select an RMA Line Number to view the depot repair details.
- Select View By to filter the depot repairs in progress by Inventory Organization.

Depot Repairs in Progress

Field	Description
RMA Line Number	Select the RMA Line Number link to go to the Depot Repair details page.
RMA Status	View the status of the RMA, such as Received, Not Started, Awaiting Billing or Closed.
Organization	View the default inventory organization. Defaults from Inventory Transaction Organization profile (INV_DEFAULT_ORG_ID). If profile isn't set, the first inventory organization you can access appears.
Customer	View the customer name. View the customer for whom the RMA line has been created.

Field	Description
Debrief Status	View the debrief status of the RMA line, such as New and Costed.

Actions

Use the actions to open different pages within Service Logistics.

- Select one of the pinned actions in the Actions region.
- Select View all actions to see a list of all available actions in the Actions drawer.

Note: You can change pinned actions by selecting the pins you see in the View All actions drawer.

Guided Journeys

This landing page is enabled for Guided Journeys. See the Guided Journeys Configuration Using Page Properties topic in the Extending Redwood Applications for HCM and SCM Using Visual Builder Studio guide for details.

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 and 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 best 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 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.

- Service Logistics also calculates the charges including taxes for these part requirements through integrations with Subscriptions, Tax, and Pricing. For field service part requirements, this is a price estimate. The final price is calculated after the field service debrief transactions for parts, labor, and expenses are reviewed and submitted. For part sales and exchanges, 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 calculation.

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 the Fusion Service section 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, because of the Service Logistics and Field Service Cloud integration.

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.

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 predefined 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's 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 decided 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 sync 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 and order parts to replenish your trunk stock. Some field service technicians might only have access to create part requirements for certain field stocking locations but not start 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 predefined 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.

Order Parts Using Service Logistics

Initiate Part Requirements

To order parts you must first complete the parts header.

Go to the Create Requirements page and create your part requirements:

1. Select **Manage Part Requirements** from the navigator.
2. Click the **Create Requirement** button.
3. In the Create Part Requirements page, select a value in the **Document Type** field.
 - a. Service Request: Sell parts, exchange parts, create an RMA.
 - b. Service Work Order: Order field service parts.
 - c. Replenish Trunk Stock: Replenish technician trunk stock.
 - d. Replenish Warehouse: Replenish warehouse.
4. **For service requests and service work orders:** Select a value from the **Document Number** field:
 - a. If you select Service Request as the document type: 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.
 - b. If you select Service Work Order as the document type: 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.
5. **To replenish technician trunk stock:** You don't need a document number or a work order number. Select the technician name from the **Technician** list of values. 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:
 - a. Party type of the employee should be Person in TCA Parties.
 - b. 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.
 - c. Ship-to site is defined for the technician in the Manage Customers page and an address is added to that ship-to site.
6. **To replenish warehouse:** You don't need a document number or a work order number.
 - o The **Address Type** field defaults to Warehouse and is disabled.
 - o You must enter the business unit, destination organization, and destination subinventory.

Create Part Requirements Page

The following table lists the fields in the header region of the Create Part Requirements page.

Create Part Requirements Page - Header Field Descriptions

Attribute	Description
Document Type	Indicates what you're requesting parts for, such as a service request, work order, or for replenishing a stocking location. Values are derived from the ORA_RCL_SOURCE_DOC_TYPE lookup code. Service Logistics has the following predefined document types:

Attribute	Description
	• Service Request • Service Work Order • Replenish Trunk Stock • Replenish Warehouse To order parts for third-party work orders such as from a legacy application, your help desk must set it up as a document type using the Service Logistics lookup, ORA_RCL_SOURCE_DOC_TYPE. The Service Work Order document type is used for generic work orders, Oracle Field Service Cloud work orders, and standalone work orders. 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 Service Request and Replenish Warehouse aren't available to field service technicians.
Document Number	Numeric identifier for the service request or work order for which you're creating the part requirement. • For a service request created in Fusion Service, you must select from the list of values that shows all the service requests (with a customer party) for which a part requirement line hasn't been created and where the service request status type isn't Closed or Resolved. • 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. • For a third-party or customer defined document type, you manually enter the document number in an editable text field. • This field is disabled for the parts replenishment document types. 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 from the document number selected. When the document type is a work order, the values default from the work order.
Ship-to Address Type	Drop-down list shows the following values: • Customer when the document type is Service Request or Service Work Order. • Customer, Technician, and Warehouse when the document type is Service Work Order. • Technician when document type is Replenish Trunk Stock. • Warehouse when document type is Replenish Warehouse. • No default value for customer defined document types.
Customer	Customer for whom the order is created. Value is required when the ship-to address type is Customer. It defaults from the service request selected. For service work orders, it defaults from the work order. When document type is customer defined, user can select from the list of values available.
Technician	Required when document type is Replenish Technician Trunk Stock. List of values includes TCA Party Names where: • Party_Type is equal to Person. • Usage Code is equal to Field Service Technician.

Attribute	Description
	Party has a TCA address. When the document type is Service Work Order and the work order has a technician assigned, the technician name defaults in this field. The technician name also defaults when the user accessing the page is a field service technician.
Business Unit	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 Replenish Warehouse document type, users can select from the available list of values. When technician details are entered for certain document types, the business unit is derived from the destination organization details of the technician's default usable subinventory.
Ship-to Address	Field can be edited only when the Ship-to Address Type is Customer, Technician, or Warehouse. If the address type is Customer, LOV displays all the ship-to party site addresses for the selected customer party. If the address type is Technician, LOV displays the ship-to party site addresses of the technician selected. When the address type is Warehouse, the Ship-to Address field is disabled and the default warehouse's address is displayed.
Ship-to Customer	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's different from the service request. When parts requirements are created in Service Logistics, this field appears in the header for the following document types: Service Request Service Work Order, with the ship-to address type, Customer Third-party Work Order, with the ship-to address type, Customer Note: When you select a different customer, the Ship-to Address 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 that the 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 in 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.

Attribute	Description
Bill-to Account	The default account from the bill-to customer, if there's only one account. If there's 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](#)
- [Exchange Parts](#)
- [Return Parts](#)
- [Order Field Service Parts](#)
- [Order Parts for a Third-Party Work Order](#)
- [Replenish Technician Trunk Stock](#)
- [Replenish Warehouse](#)

Sell Parts

After you've created the Part Requirement header, you can use the Add Part page to create sales order lines to ship/sell supplies and spare parts to customers.

1. Click the **Add Part** button to go to the Add Part window. Here you'll select the item that you want to order. Note the following about the fields in this page:

Attribute	Value
Service Activity	Service activities whose billing type is linked to the billing category Material and the business process is Customer Support .
Item	The items are filtered based on the service activity and billing type association in the Manage Service Activities page. Items must have the following attributes: ○ Item Organization = Default Inventory Org profile (INV_DEFAULT_ORG_ID) ○ Stock enabled = Yes ○ Transactions enabled = Yes ○ Customer Orderable = Yes

Attribute	Value
	Must be assigned a billing type tied to the billing category Material (Manage Billing Types page)
Revision	Revision values of selected item. Enabled only if the item is revision controlled.
Ship-to Address Type	Customer
Ship-to Customer	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's different from the service request. Note: When you select a different customer, the Ship-to Address field defaults to the ship-to customer's address.
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. Use this field to change the return-from customer. Create sales orders using the sold-to customer to identify the physical location of the part. This is the customer or organization who's returning the item. You can use the same customer and address information for tax credit calculations.
Return-from Address	The list of values includes the ship-to party addresses related to the customer selected in the Return-from Customer field.

2. To source the part manually, select the source organization where the parts are located.
 - a. The following optional fields are enabled:
 - Source Subinventory: Where the parts are located.
 - Requested Ship Date: The date that you'd like the part shipped.
 - 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 and subinventory.
 - c. The automatic parts search program won't run.
 - d. For manually sourced parts, the expected arrival is set to need-by date regardless of the requested ship date and shipping method entered by the user.
3. Click **Add** after you've entered all the item details. A requirement line is created in the Part Requirements table.
4. 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've specified the source organization and subinventory details in the Add Part window.
5. 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 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 shipping method. In the Parts Search window, you might enter a different need-by date than the date in the Add Part window. This lets you search for parts in the best stocking locations later, if the part you want 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.
6. Charges are automatically calculated then Part Requirements are created. The part price that's returned by Pricing appears in the **Your Price** column in the requirement line. Sometimes you might need to adjust the price. For example, you might need to correct price errors or discrepancies that might 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 the pencil icon next to the Your Price value and open 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. Predefined 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. 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.
9. You can add more parts using steps 1 to 5. When you've 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. Click the **Add Part** button to go to the Add Part window.
2. Select a return service activity code for the **Parts Exchange** business process. The Add Part window is refreshed to display fields that you must enter to create the return order line and fields that you must enter to create the corresponding shipment order line. Use the table for information on the fields.

Attribute	Value
Service Activity	Service Activities whose billing type is linked to the billing category Material and the business process is Parts Exchange. Select a return service activity code. The service activity code (SAC) will decide 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.

Attribute	Value
Item	The defective or broken part that must be returned. 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. Items must have the following attributes: ○ Item Organization = Default Inventory Org profile (INV_DEFAULT_ORG_ID) ○ Stock enabled = Yes ○ Transactions enabled = Yes ○ Returnable = Yes ○ Must be assigned a billing type tied to the billing category Material (Manage Billing Types page).
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	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 and all the assets that are components of the asset specified on the service request. If there's no asset specified on the service request, list of values shows assets: ○ Associated with the service request customer party. ○ That have the Maintainable attribute set to Yes. ○ Where the asset item matches the item number of the part being returned. For nonserialized asset tracked items, you must select an asset in the Asset field.
Shipment Service Activity	Service Activities whose billing type is linked to the billing category Material and the business process is Parts Exchange . Value defaults to the first shipment service activity code that you've defined in the Parts Exchange business process.

Attribute	Value
Shipment Item	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. Items must have the following attributes: ○ Item Organization = Default Inventory Org profile (INV_DEFAULT_ORG_ID) ○ Stock enabled = Yes ○ Transactions enabled = Yes ○ Customer Orderable = Yes ○ Must be assigned a billing type tied to the billing category Material
Need By	Select a date.
Ship-to Address Type	Customer
Ship-to Customer	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's different from the service request. Note: When you select a different customer, the Ship-to Address field defaults to the ship-to customer's address.
Ship-to Address	Defaults to the primary ship-to address of the customer party.
Source Organization	Defaults from the destination organization of the RMA.
Source Subinventory	Field is enabled when a source organization is selected. List of values include 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. Use this field to change the return-from customer. Create sales orders using the sold-to customer to identify the physical location of the part. This is the customer or organization who's returning the item. You can use the same customer and address information for tax credit calculations.
Return-from Address	The list of values includes the ship-to party addresses related to the customer selected in the Return-from Customer field.

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

4. A stocking location is automatically identified for the spare part using automated parts sourcing (unless you've opted to manually source the parts). To change the stocking location, click the search icon next to the Stocking Location value to open the Parts Search window. Here you can select another stocking location using the various sourcing options. You can also search for part availability later, 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.
5. Click **Order** when you've completed 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.

Return Parts

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

In this case, a customer returns the defective or broken part and there's no shipment of a replacement part. Customer support must capture the details of this part by creating an RMA for the defective or broken part.

1. Click the **Add Part** button to go to the Add Part window.
2. In the Add Part window, select a service activity code that has been set up for customer service returns (Customer Support business process). 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 other information:

Attribute	Value
Service Activity	Select a service activity, such as Return, that's been set up for customer service returns.
Item	Items assigned to the selected destination organization. Items must have the following attributes set up in the Item Master: ○ Material billable = M ○ Stock enabled = Yes ○ Transactions enabled = Yes ○ Returnable = Yes ○ Must be assigned a billing type tied to the billing category Material.
Return Reason	Select from the list of values derived from the DOO_RETURN_REASON lookup type.
Destination Organization	Value set for the profile option: Default Return Organization.
Destination Subinventory	Subinventories of the selected inventory organization.
Ship-to Address Type	Customer

Attribute	Value
Ship-to Customer	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's different from the service request. Note: When you select a different customer, the Ship-to Address field defaults to the ship-to customer's address.
Ship-to Address	Defaults to the primary ship-to address of the customer party.
Return-from Customer	List of values includes valid customers and is the same as the existing bill-to customers. Use this field to change the return-from customer. Create sales orders using the sold-to customer to identify the physical location of the part. This is the customer or organization who's returning the item. You can use the same customer and address information for tax credit calculations.
Return-from Address	The list of values includes the ship-to party addresses related to the customer selected in the Return-from Customer 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 an 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.

- Click 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	Items assigned to the selected destination organization. Items must have the following attributes set up in the Item Master:

Attribute	Value
	○ Must be valid for the destination organization. If there's no destination organization, it must be assigned to the organization set up in the Default Inventory Org profile (INV_DEFAULT_ORG_ID). ○ Stock enabled = Yes ○ Transactions enabled = Yes ○ Internal Orderable = Yes ○ Must be assigned a billing type tied to the billing category Material (Manage Billing Types page).
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 Customer , the shipping address defaults from the customer's address on the work order. If the 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 the address type is Warehouse , the Ship-to Address field is disabled and the default warehouse's address is displayed.
Destination Organization	Inventory organizations with at least one subinventory set up in the Manage Stocking Locations page. ○ Defaults to the field service technician's default stocking location inventory organization if work order has technician assigned. ○ 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. ○ Defaults from the default destination organization defined in the RCL_DEF_DESTINATION_ORGANIZATION profile when no technician or work area is found on the work order.
Destination Subinventory	Subinventories of the selected inventory organization. For shipments, they must also be set up in the Manage Field Parts Inventory page.

2. Return to the main page (Create Part Requirements page).
3. 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 the automated parts search is unable to find the part or returns a stocking location that's not satisfactory, you can select another stocking location. Click the search icon next to the Stocking Location value to access the Parts Search window.
4. Select the checkboxes to use other sourcing options. Pick the desired stocking location from the search results returned by the parts search program. If the part isn't found in the best 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.
5. Click **Order** after you've 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. Click the **Add Part** button and enter the item details.
 - The destination organization, subinventory, and address fields are populated based on the technician selection.
2. Click **Add**, return to the main page, and then select **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.

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. Click the **Add Part** button and enter the item details.
2. 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 the service request to go to the service request details page.
3. Click 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 decides if it's a part order line or return line. See the note on service activities at the end of this topic.
 - 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. Often, you'll 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 another stocking location. To do so, click the search icon next to the Stocking Location value in the part requirement line. The Parts Search window opens.

When the Parts Search program finds parts, the following decide the Expected Arrival:

 - o **Ship-to Address:** Identifies the zones that decide the shipping method (transit time). For example, the shipping method could be set to a 2-Day Air delivery.
 - o **Expected Arrival: Current Date + Transit Time**
8. Select the checkboxes 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 shipping 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** value 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. Your Price includes contract and warranty coverage discounts and 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. Predefined 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 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.
14. Click the order number to view the sales order details.
15. Click 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 Parts Exchange business process:** 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 and 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 Customer Support business process:** 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've 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 the **Add Part** button again to create the RMA.

Related Topics

- [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 the **Part Details** tab.
3. Click 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 the search icon next to the Stocking Location value to access the Parts Search window.
8. The checkboxes indicate other 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.

When the Part Search program finds parts the following decides the **Expected Arrival**:

- **Ship-to Address:** Identifies the zones that decide the shipping method (transit time). For example, the shipping method could be set to 2-Day Air delivery.
 - **Expected Arrival: Current Date + Transit Time**
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](#)

Source Parts Using Service Logistics Parts Search

The Service Logistics parts search program finds parts needed for field service and customer support (parts-only service) and field stocking location replenishment.

It requires both SCM and Service Logistics setups. See the Getting Started with Service Logistics guide for details. Service Logistics parts search also supports GOP sourcing, although Inventory sources and GOP are generally used more for long lead-time product sales.

Parts Search runs automatically when you create or update a part requirement without selecting a source stocking location and shipping method. It searches for the requested item and any eligible substitute or supersession items. It then returns the closest sourcing option with the lowest shipping cost, based on the item, stocking location, and shipping method.

Parts Search uses transit times from stocking locations to the shipping zone of the Ship-to Address to find the required parts. If shipping method schedules are set up, Parts Search uses them to identify the expected ship's arrival dates and times. Otherwise, it uses the lead times configured in Transit Times to calculate these dates.

Parts Search also supports supply chain transit times for destination inventory locations. To accommodate different sourcing rules for field stocking locations and technicians within the same shipping zone, Parts Search checks whether source stocking locations are configured for the destination. If they're, Parts Search uses only those source locations and their configured transit times. If none of those locations has the required parts, Parts Search doesn't expand the search to other locations in the Ship-to Address shipping zone.

If the Parts Search doesn't find the required parts in the parts supply chain:

- In ADF pages, the Part Search page appears so you can change the search criteria and search for the parts again.
- In Redwood pages, you'll need to manually open the Parts Search and search for the parts again.

If shipping method schedules are set up, Parts Search uses them, along with the Ship-to Address and need by date, to calculate the ship's arrival date and time.

Shipping method schedules are used to calculate delivery dates. When a need by date is provided, Parts Search decides the latest date and time when the shipping method can deliver the parts and still meet the specified date. When a need by date isn't provided, Parts Search decides the earliest date when the shipping method can deliver the parts.

If shipping method schedules aren't set up, Parts Search uses transit times for these calculations

Shipping Method Schedules Search Page

Shipping Method	Lead Time	Lead Time UOM	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Pick-up Time	Delivery Time	Distance	Distance UOM	Enabled	Action
Airborne-Parcel-2nd day air	1	Day	—	—	✓	—	—	—	—					Yes	
Airborne-Parcel-Standard	2	Day	✓	✓	✓	✓	✓	✓	✓	15:00	12:00			Yes	
C H Robinson-Air-Express	1	Day	—	—	—	✓	—	—	✓	22:44	22:44	54	Length	Yes	
C281295018-Ocean-Express	1	Hour	✓	—	✓	—	—	—	—	22:44	23:00	34	Kilometer	Yes	
DHL-Air-Express	1	Day	✓	✓	✓	✓	✓	—	—	11:00	12:00			Yes	
DHL-Parcel-2nd day air	2	Day	✓	✓	✓	✓	✓	✓	—	11:00	09:00			Yes	
FEDEX Canada-Air-FedEx overnight	1	Hour	—	✓	—	—	✓	—	—		23:59			Yes	
UPS-Truckload-Ground	5	Day	✓	✓	✓	✓	✓	—	—	10:00				Yes	
Uber-Courier-Courier -- 2 hour	2	Hour	✓	✓	✓	✓	✓	✓	✓			100	Mile	Yes	
Uber-Courier-Expedited Courier - 1 hour	1	Hour	✓	✓	✓	✓	✓	✓	✓			50	Mile	Yes	
Uber-Parcel-Door to door	90	Minute	✓	✓	✓	✓	✓	✓	✓			40	Mile	Yes	

- **When a need by date isn't entered:** The program uses the earliest each shipping method schedule that can be used to deliver parts to the specified ship-to address.
 - Expected ship date and time is based on the next available pickup time for the shipping method schedule.
 - Expected arrival date is calculated using the shipping method schedule lead time.
 - Expected arrival time is based on the delivery time defined for the shipping method schedule.
- **When a need by date is entered on the part requirement or within the Parts Search UI:** The program uses the latest possible ship date and time that still meets the requested need by date and time.
 - Expected ship date and time reflects the last available pickup time that satisfies the requirement.
 - Expected arrival date and time are identified using the shipping method schedule lead time and delivery schedule.

If parts can't be found, a backorder (sales order or transfer order) is automatically created when the user selects Save and Close. For the transfer order backorders, inventory sourcing rules are used to identify its default source stocking location. Sales order backorders are created without a source, arrival date, or shipment method schedule.

Search for Parts Page

Search for parts

Item - RCL_AS54888 | Ship-to address - 1111 14th st/DENVER, CO 80202

Manned
☒

Alternates
☐

Global Order Promising
☒

Need By
22/04/26 12:00 AM

Required Quantity
1

Search

Stocking Location	Quantity	UOM	Type	Shipping Method	Expected Ship	Expected Arrival	Shipping Cost	Order Quantity	Actions
RCL_NW.Usable	949	Each	Manned Warehouse	Federal Express-Air-FedEx 2day	25/03/26 09:12 PM	27/03/26 09:27 PM	9	1	
FST.FST_MAN	90	Each	Manned Warehouse	Federal Express-Air-FedEx 2day	25/03/26 09:12 PM	27/03/26 09:27 PM	10	0	
M2	1	Each	Manned Warehouse	--	25/03/26 09:12 PM	22/04/26 12:00 AM	0	0	

Total Order Quantity 1

Cancel

Apply

The switches control what searches are performed. All the sourcing options are available for field service (service work orders or third-party work orders) while customer support (service requests and third party service requests) only supports manned stocking locations and GOP searches.

You can also access the Parts Search page by selecting the source stocking location or the magnifying glass icon.

Part Requirements- Magnifying Glass Icon

Part Requirements

CancelEdit DetailsOrder

Document Type: Service Work Order

Details

Service Work Order
0000023020
Ship-to Address Type
Customer
Destination Organization
Field Service Technicians

Customer
FSACCOUNT
Ship-to Customer
FSACCOUNT
Destination Subinventory
FS_Truck1

Business Unit
Vision Operations
Ship-to Address
1111 14th st/DENVER, CO 80202
Need By
18/07/24 12:00 AM

Part lines

Add PartRefreshUpdate Requirements

☐	Item	Description	Sourcing Policy	Quantity	Need By	Stocking Location	Status	Order	Ship-to Customer	Actions
☐	RCL_Buy_Only_Item_Serial	RCL Serialized Buy Only Item used for Purchase Requisition & PO	Buy Only	1 Each	18/07/24 12:00 AM				FSACCOUNT	
☐	RCL_Buy_Only_Item_Non_Serial	RCL Non-Serial Buy Only Item used for Purchase Requisition & PO	Buy Only	3 Each	18/07/24 12:00 AM				FSACCOUNT	
☐	RCL_Inventory_Only_Item	RCL non-serial Inventory Only Item used for TO creation	Inventory Only	1 Each	18/07/24 12:00 AM	RCL_NW_Usable			FSACCOUNT	
☐	RCL_Inventory_Buy_Item_PO	RCL non-serial Inventory then Buy Item used for PO creation	Inventory then Buy	1 Each	18/07/24 12:00 AM	Q			FSACCOUNT	
☐	RCL_Inventory_Buy_Item_TO	RCL non-serial Inventory then Buy Item used for TO creation	Inventory then Buy	1 Each	18/07/24 12:00 AM	RCL_NW_Usable			FSACCOUNT	
☐	RCL_A554888	RCL_A554888_Desc		1 Each	18/07/24 12:00 AM	FST_FST_SDS			FSACCOUNT	

- The Parts Search page sorts the sourcing options from the lowest to the highest shipping costs as defined in the Transit Times page. The Parts Search page only lists the shipping method schedule that meet the need by date. Expected Arrival is the current date and time plus the shipping method schedule's transit time.
- You can change the Need By Date/Time to expand your parts search when no parts are found that can meet the date.
- Select a row or source and select Save and Close. This updates the part requirement with a source stocking location, shipping method, and arrival date.

The parts search program uses shipping zones of the ship to addresses to find the stocking locations/internal locations, as defined in the Transit Times page, 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 and order from a technician's trunk stock subinventory, 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.
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 and order from site-dedicated locations, a reservation is created.

Sourcing Option	Details
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 and order 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. Inventory sources are also used to create backorders.

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, as defined in the Transit Times page. The search program calculates the arrival date and time for each shipping method. 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 creating part requirements from the Add Part page and the parts search can't find the required quantity in a single location, the Parts Search page opens. This lets you search and order parts from multiple stocking locations. In this case, the required quantity appears in the header region of the page and the ordered quantity appears in the search results table. The ordered quantity defaults from the required quantity, using parts from the lowest shipping cost locations until the sum of the ordered quantities equals the required quantity. If two stocking locations have the same shipping costs, Service Logistics uses the location with the most parts. You can also change the quantities in the results based on your preferences.

Search for alternate parts:

If the original part is available, it's used by default to fulfill the part requirement. However, the **Alternates** sourcing option on the Parts Search page can be used to search for substitute and supersession parts even when the original part is available, for example, when an alternate part is available locally and the original part is found far away.

- Substitute and supersession parts are defined in the Product Information Management application. Define substitute and supersession service parts using the Type list of values (LOV) on the Manage Item Relationships page.
- After you perform the search, the substitute and superseded parts that you can use will appear in the Parts Search page. 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.

Additional setups:

- Interorganization relationships must be set up in the Manage Interorganization Parameters page before you can create transfer orders to ship parts to field locations.
- Shipping methods must be set up for source organizations in the Manage Carriers page before you can use them in the Manage Transit Times page.
- Stocking locations (inventory organizations and subinventories) must be assigned internal locations on the Manage Locations page. These internal locations are used as source locations when setting up transit times to a zone or destination location on the Manage Transit Times page.
- Shipping method schedules must be set up for carriers in the Shipping Methods page to incorporate shipping method schedules in parts search.
-

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 backorders.
- 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 see the field descriptions from the following table.

Attribute	Description
Document Type	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 predefined document types: ○ Service Request ○ Service Work Order ○ Replenish Trunk Stock ○ Replenish Warehouse To order parts for third-party work orders such as from a legacy application, your system administrator must set it up as a Document Type using the Service Logistics lookup, ORA_RCL_SOURCE_DOC_TYPE. The Service Work Order document type is used for generic work orders, Oracle Field Service Cloud work orders, and standalone work orders.
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. When you create the sales order or transfer order, the order number appears in the corresponding part requirement line. Click 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.
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.

Attribute	Description
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'll see a list of existing part requirements in **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:
 - Click the **Add Part** button to add parts to the existing requirement.
 - Click the **Delete** button to remove an existing part.
 - 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**. If you select part requirements that create sales orders along with part requirements that create transfer orders, only transfer orders are created.
 - Click **Create Requirement** to go to a blank Create Part Requirements page where you can create a new part requirement.

Note: You should understand the following:

- 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`.
- 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.
- 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](#)

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 the **Delete** button. This cancels the order. The part requirement line will still appear.
2. To remove the requirement line, click 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 Service Request Details window, click **Parts** to view the part requirement lines created for that service request.
3. Select the part requirement line and click the **Delete** 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** 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.

Tax Calculation

How are Taxes Calculated?

When you add or save part requirements, Service Logistics calls Pricing to calculate sales prices and taxes.

Specifically, Service Logistics creates sales orders so that the estimated taxes aren't recalculated by Order Management. The official taxes are calculated in Receivables, which uses the tax determinants passed from Service Logistics to Order Management during pricing.

Note: Service Logistics uses the Get Tax Determinants Tax API (ZxApiPub.getDefaultTaxDetAttribs).

You'll define tax determinants for transactions, exemptions, products, and invoice details that Fusion Tax passes to Pricing.

Tax Determinant Inputs

Tax Determinant	Header/Line	Tax Determinant Inputs
Entity Code	Header	Order
Entity Class Code	Header	SALES_TRANSACTION_TAX_QUOTE
Entity Type Code	Header	ORDER_CREATED

Tax Determinant	Header/Line	Tax Determinant Inputs
Internal Organization ID	Header	- For service request part requirements, the service request business unit is used. - For third-party service requests part requirements, the part requirement header business unit is used.
Transaction ID	Header	Debrief Header ID
Transaction Date	Header	System date (today's date)
Transaction Currency Code	Header	null
Legal Entity	Header	Business unit's legal entity
Transaction Number	Header	Debrief Header ID
Transaction Business Category	Line	null
Transaction ID and Transaction Line ID	Line	Debrief Header ID
Line Level Action	Line	CREATE
Transaction Line Type	Line	ITEM
Transaction Line Date	Line	System date
Transaction Line Currency Code	Line	null
Line Amount	Line	zero
Unit Price	Line	zero
Transaction Line Quantity	Line	quantity on debrief line
Exemption Control	Line	S (Standard)
Exemption Certificate Number	Line	null
Product ID	Line	Item ID from debrief line (parts, labor, expense, fixed charge)
Product Org ID	Line	From debrief line. Field Service/Third Party Object: - Parts: Inventory Organization where parts were used from or to where they were returned. - Labor, Expense, Fixed Charges: Cost organization on the Debrief/Charges header.
UOM Code	Line	Debrief line
Ship-to Party ID	Line	Customer from Debrief header
Bill-to Party ID	Line	Customer from Debrief line (or header)
Ship-to Party Site ID	Line	Field Service: Service address from Debrief header

Tax Determinant	Header/Line	Tax Determinant Inputs
Bill-to Party Site ID	Line	null
Ship-to Account Site Use ID	Line	null (as ship-to account isn't captured)
Bill-to Account Site Use ID	Line	Derived from account and bill-to address (account site) entered on the debrief line (or header) and the usage bill-to.

Example: Tax Determinant Output Passed from Fusion Tax to Pricing

Tax Determinants	Example	Tax Determinant Type
Taxation Country	United States	Transaction
Document Fiscal Classification (Document Subtype), such as accounting, taxable goods, standard taxable services	Document subtype: null (accounting, taxable goods, and standard taxable services)	Transaction
First Party Tax Registration, based on registration type, legal reporting unit, tax regime code, tax	4567890 (registration type, legal reporting unit, tax regime code, and tax)	Transaction
Third Party Registration Number	null	Transaction
Transaction Business Category, such as intercompany transaction, trade management	Sales Transaction (Intercompany, Transaction, Trade Management)	Transaction
Tax Classification Code, such as AT VAT standard rate, AT VAT zero rate	VAT20 (VAT Standard Rate, AT VAT Zero Rate) - appears in Pricing Components page.	Transaction
User Defined Fiscal Classification	null	Transaction
Tax Exemption, such as standard or exempt	Standard (Standard or Exempt)	Exemption
Tax Exemption Reason Code, such as hospital, manufacturer, resale, education	null (hospital, manufacturer, resale, education)	Exemption
Tax Exemption Certificate Number	null	Exemption
Product Category, such as cargo transport, professional services, services, software maintenance	null (cargo transport, professional services, services, software maintenance)	Product
Product Type, such as goods (parts and fixed charges) or services (labor and expenses)	Goods (parts and fixed charges) or Services (labor and expenses)	Product
Product Fiscal Classification	-	Product
Intended Use	CPO-INTD1	Product
Tax Invoice Number and Date	null	Tax Invoice Details

Note: Once charges post, they can't be edited.

3 Manage Parts Requirements (Redwood)

Overview of Part Requirements in Redwood

You can manage part requirements from the Part Requirements page.

Specifically, you can:

- Search for parts using predefined 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.

Part Requirements Search Page

☐	Document Type	Document ID	Item	Quantity	Order	Need By	Source	Destination	Technician	Manage Parts
☐	Service Work Order	0000048022	RCL_ASS4888	2	563118	08/12/25 07:32 AM	RCL_NW.Usable	FST_FS_Truck2	Fred Bramer	
☐	Service Work Order	0000048022	RCL_FSS4888	1	565097	08/12/25 07:32 AM	FST.FST_MAN	FST_FS_Truck2	Fred Bramer	
☐	Service Work Order	0000048018	RCL_FSS4888	1	558097	07/12/25 08:45 PM	FST.FST_MAN	FST_FS_Truck2	Fred Bramer	
☐	Service Work Order	0000048018	RCL_ASS4888	2	558099	07/12/25 08:45 PM	RCL_NW.Usable	FST_FS_Truck2	Fred Bramer	
☐	Service Work Order	0000047021	RCL_ASS4888	2	551202	07/12/25 04:47 AM	RCL_NW.Usable	FST_FS_Truck2	Fred Bramer	

Prerequisite: To use the search on the Part Requirements search page, you should 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.

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	Note: Technicians (users with RCL_FSTECH_PARTS_REQUIREMENTS_SEARCH_PRIV privilege) can view the following document types: • Service Work Order • Third Party Service Work Order • Replenish Trunk Stock The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include the following lists: • Need By • Document Type • Sourcing Status • Ship-to Address Type • Work Order Area Note: The search can display multiple filter chips as a single combined search. If you apply one or more filters, select out of the search bar for a few seconds, and then select a record in the table, the selected criteria are saved as a recent search filter. For example, if you search using the Sourcing Status and Need By filter chips, this criteria are combined into a new filter chip. By default, the search page lists part requirements with Need By set to "This Week." You can search for a value directly by trying a document number, order, or item. For example, enter free text, which searches the following part requirements attributes: • Document Number • Ship-to Address • Source Subinventory • Destination Subinventory • Work Order Area • Technician • Order Because the application supports autocomplete and fuzzy logic, you can partially type your search terms.

Field Name	Description
	The following attributes support autocomplete: • Customer • Item • Source Organization Code • Destination Organization Code The Item attribute also supports fuzzy logic.
Filter Chips suggestions bar	The filter chips appear in 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. When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the results table.
Magnifying Glass icon	You can use the Magnifying Glass icon to filter your results based on predefined filter chips and their associated values. Specifically, the magnifying glass shows filter chips with preselected values. Some examples are: • Need By: Last Year • Document Type: Service Request • Sourcing Status: Not Sourced • Ship-to Address Type: Customer
Part Requirements results table	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. You can select Submit Order for a selected part line to create transfer orders or reservations for parts. Note: Submit Order 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.

To access the Part Requirements pages:

- Select Create Part Requirement to open the Parts Requirements header page and create a new part requirement.
- Select Manage Parts to open the Part Requirements detail page and view header information and all part requirements.

Manage Part Requirements

You can manage part requirements for service request and service work order document types.

In the Part Requirements page, you can:

- Access the service work order or service request.
- Add required parts.
- Submit mass updates for parts.
- Verify the assigned stocking location assigned by automatic sourcing.

Note: If a line isn't ordered you can make manual updates and perform automatic sourcing. In this case, the stocking location appears as a link on the Part Requirements search page.

- Review the bill-to customer information in cases where assets needing repair have a different customer paying for the service, like with a lease. The bill-to information defaults from the service request or work order into the field service charges.
- Change the assigned stocking location, if required.
- Place orders for required parts.

To access the Part Requirements pages:

The Part Requirements pages can be accessed from the Part Requirements search page as follows:

- Select Create Part Requirement to open the Parts Requirements header page and create a new part requirement.
- Select Manage Parts to open the Part Requirements detail page and view header information and all part requirements.

To create a new part requirement:

1. Select either the service request, service work order, replenish warehouse, or replenish technician trunk stock as the document type.

Depending on the document type, you can add details such as the document number, ship-to address type, ship-to address, ship-to customer, destination organization, destination subinventory, asset, and the need by date.

Fields that Appear on the Create Part Requirements Page for the Selected Document Types

Part Requirements Field	Service Request Document Type	Service Work Order Document Type	Replenish Warehouse	Replenish Technician Trunk Stock
Document Type	Yes	Yes	Yes	Yes
Business Unit	Yes	Yes	Yes	Yes
Document Number	Yes	Yes	No	No
Customer	Yes	Yes	No	No
Ship-to Address Type	No	Yes	Yes	Yes
Ship-to Customer	Yes	Yes	No	No
Ship-to Address	Yes	Yes	Yes	Yes

Part Requirements Field	Service Request Document Type	Service Work Order Document Type	Replenish Warehouse	Replenish Technician Trunk Stock
Bill-to Customer	Yes	No	No	No
Bill-to Account	Yes	No	No	No
Bill-to Address	Yes	No	No	No
Destination Organization	No	Yes	Yes	Yes
Destination Subinventory	No	Yes	Yes	Yes
Asset	Yes	Yes	No	
Need By	Yes	Yes	Yes	Yes
Purchase Order	Yes	No	No	No
Payment Method	Yes	Yes	No	No
Credit Card (Appears once Credit Card has been selected as the Payment Method).	Yes	Yes	No	No
Technician	No	Yes	No	Yes
Estimate Number	Yes It only appears when an approved estimate exists for the document number and document type.	Yes (appears as an Estimate). It only appears when an approved estimate exists for the document number and document type.	No	No

Note: Depending on your setups you might also see an Additional Information region with flexfields related to the part requirement.

2. Select Save and Continue. The Part Requirements page appears. From here, you can:
 - Edit header information.
 - Add, edit, and view part requirement lines.
 - Perform automatic sourcing and manual sourcing for the parts.
 - Copy part requirements from an estimate, if an approved estimate exists for the selected document number and document type.
 - Place orders for the parts, which creates a sales order, purchase requisition, transfer order, or a reservation.
 - Enter payment methods, such as credit card or on account.
- a. To update the header details, select Edit Details. This opens the Part requirements details drawer.
 - Update the fields that appear for the document type, such as customer and address information or the need by date. Select Update to make changes.
 - To return to the Part Requirement details page with no changes, select Cancel.
- b. In the Part lines region, you'll see information such as item, description, need by, stocking location, status, order, ship-to customer, and actions that you can perform.

You can navigate to detail pages by selecting links within the line. Select the:

- Link in the Item column for the part detail.
- Link in the Order column for the sale order or transfer order detail.

Note: Data security for Transfer Order Details isn't currently included in the Service product. An administrator must manually grant Field Service Technicians access by adding the Grant on Inventory Organization policy with the Manage Shipment privilege to the Field Service Technician role.

1. a. For service work orders, the Part Sourcing column shows how a part is sourced. These values are defined in the item master and include:
 - Buy Only: Part isn't stocked and is only purchased when it's needed for a work order. In this case a purchase requisition is automatically created and the part is shipped directly to the customer site or field technician.
 - Inventory then Buy: Part is purchased when it's out of stock and needed for a work order.
 - Inventory Only: Part is sourced from inventory. If an Inventory Only item is out of stock, a transfer order is created as a back order.
 - Null: Works the same as Inventory Only.

Some things to know about part sourcing:

- If part requirements have been created, but haven't been ordered you won't see a purchase order number.
- When part requirements are created, Service Logistics automatically tries to find parts in inventory for Inventory Only and Inventory then Buy items.
- After you order, the purchase requisitions, transfer orders, and reservations are created and display in the Order column.
- After a purchase order is created from the requisition, the purchase order number displays instead of the requisition number. You can cancel the requisition until the purchase order is created.
- Select Delete in the Actions column to delete the following:
 - For transfer orders this action cancels the transfer order.
 - For reservations this action deletes the reservation.

- For purchase requisitions this action reassigns the purchase order to the user and cancels the purchase requisition.

Note: You can only do this if a purchase order hasn't already been created.

- b. Select Add Part to add a new part. This opens the Add Part drawer.
 - Update the part details such as item and address information or the need by date.
 - Select Add to return to the Part Requirements details page or Add and New to add another part.
 - To return to the Part Requirements details page with no changes, select Cancel.
- c. To perform a mass update for unordered parts, select the checkbox for the part lines that you'd like to update, then select Submit Mass Update. This opens the Part requirements mass update drawer.
 - Update the information that appear for the document type, such as customer and address information or the need by date. Select Submit to make changes.
 - To return to the Part Requirements details page with no changes, select Cancel.
- d. To create part requirements from an approved estimate, select Copy from Estimate. This is displayed if an approved estimate exists for the document.

Note: For work orders, select Copy from Estimate from More Actions.

The part requirement shows the latest approved estimate number and the version in the Estimate Number field within the header. The estimate version might change as new approved versions are created and only appears if there's an approved estimate.

After you make the selection, Service Logistics will:

- Fetch the material lines from the estimate and copy the to the part lines.
- Copy the item, description, and quantity.
- Copy need by date, destination organization, destination subinventory from the header.
- Assign automatic sourcing to the stocking location.

Note: A few considerations:

- If you select Copy from Estimate more than once, you'll create multiple lines, and might need to delete duplicate lines.
- If an approved estimate is changed, then the future lines that you copy from the estimate will use the changed estimate.
- Estimates can have a different customer, account, address, asset, or item than the actual part requirement. If there's a mismatch the part requirement fields take precedence. The estimate should be searched based on only document number and document type.
- You can verify estimate details in the associated document. For example, if a work order is associated with an approved estimate, you can view the related information in the Charges section of the Work Order Charges page. You can verify estimate details for service requests and RMAs.

- e. Select Submit Order to order selected parts.

Add a Credit Card to a Part Requirement

You can add a credit card to pay for part orders, including new, exchange, advanced exchange, and return orders.

Either select an existing credit card associated with the bill-to address or add a new credit card.

Note: You can update the credit card until the sales order is created.

Add a Credit Card as Payment Method

1. Create a part requirement and enter the required header information.
2. In the Payment Method field, select **Credit Card**.
The Credit card drawer opens automatically.
Note: If a credit card is already associated with the part requirement, you can select the Credit Card button to open the drawer and make any changes.
3. In the Credit card drawer, select a credit card from the **Credit Card** list.
The list displays the customer's credit cards associated with the bill-to address. If only one credit card is available, it's selected by default.
4. If the required credit card isn't available, select **Add Credit Card** and enter the new credit card information.
5. Confirm the selected credit card and complete the remaining part requirement information.
6. Select **Order** to create the sales order.
When you submit the order:
 - o A unique transaction ID is created for the credit card transaction.
 - o The credit card charge is authorized.
 - o The credit card information and authorization status are added to the sales order.
 - o The sales order information flows to Accounts Receivable, where the credit card is charged.

Update the Credit Card Payment Method

You can also update the payment method from the Edit Part Requirement header drawer.

1. Open the part requirement that you want to update.
2. Open the Edit Part Requirement header drawer.
3. In the Payment Method field, select **Credit Card**.
4. In the Credit card drawer, select the required credit card from the Credit Card list.
If necessary, add a new credit card.
5. Save your changes.

How Credit Card Authorization for Order Changes are Processed

If you add parts to an existing sales order, authorization is performed only for the additional charge amount.

For example, if the original order was authorized for \$500 and additional parts increase the total by \$100, only the additional \$100 is authorized.

Credit card authorization isn't performed when the resulting total charge is negative.

Add Part Requirement Lines

You can add part requirement lines to any document using the Add Parts drawer.

Documents include service requests, service work orders, replenish warehouse, replenish technician warehouse, and third party documents.

Note: You must set the INV_DEFAULT_ORG_ID to access this page.

To access the Add Part drawer:

1. Click the **Add Part** button in Part Requirements page. This opens the Add Part drawer.
2. Add or confirm part details.

Note: You can create part exchange shipments, using the PE Ship service activity, when a broken part won't be returned by the customer. Specifically, you can reference a broken customer asset when you create a part exchange shipment. When a new part is shipped to the customer, its asset record is updated with the parent asset and the remaining warranty/subscription from the broken asset. Also, the broken asset is updated to indicate that it has been replaced.

3. Click **Add** or **Save and Add Another**.

The fields that appear on the page will depend on whether your document is a work order, or a service request and the service activity that you choose. The following table lists the fields that appear based on the selected document and service activity:

Fields that Appear on the Add Part Drawer for the Selected Document Types

Add Part Fields	Service Request or Third Party Service Request Document Type Selected (page also changes based on selected Service Activity)	Work Order or Third Party Work Order Document Type Selected
Service Activity	Yes - Return, Ship, DR Return, PE Return, PE Ship (No Return)	No
Item or Shipment Item	- Return: Yes - Ship: Yes - DR Return: Yes - PE Return: Yes - PE Ship (No Return): Yes	Yes
Description	- Return: Yes - Ship: Yes - DR Return: Yes	Yes

Add Part Fields	Service Request or Third Party Service Request Document Type Selected (page also changes based on selected Service Activity)	Work Order or Third Party Work Order Document Type Selected
	- PE Return: Yes - PE Ship (No Return): Yes	
Revision	- Return: Yes - Ship: Yes - DR Return: Yes - PE Return: Yes - PE Ship (No Return): Yes	Yes
Asset	- Return: Yes - Ship: No - DR Return: Yes - PE Return: Yes - PE Ship (No Return): No	No
Broken Customer Asset	- Return: No - Ship: No - DR Return: No - PE Return: No - PE Ship (No Return): Yes	No
Quantity	- Return: Yes - Ship: Yes - DR Return: Yes - PE Return: Yes - PE Ship (No Return): Yes	Yes
UOM	- Return: Yes - Ship: Yes - DR Return: Yes - PE Return: Yes - PE Ship (No Return): Yes	Yes
Return Reason	- Return: Yes - Ship: No - DR Return: Yes - PE Return: Yes - PE Ship (No Return): No	No
Return-from Customer	- Return: Yes - Ship: No	No

Add Part Fields	Service Request or Third Party Service Request Document Type Selected (page also changes based on selected Service Activity)	Work Order or Third Party Work Order Document Type Selected
	- DR Return: Yes - PE Return: Yes - PE Ship (No Return): No	
Return-from Address	- Return: Yes - Ship: No - DR Return: Yes - PE Return: Yes - PE Ship (No Return): No	No
Destination Organization	- Return: Yes - Ship: No - DR Return: Yes - PE Return: Yes - PE Ship (No Return): No	Yes
Destination Subinventory	- Return: Yes - Ship: No - DR Return: Yes - PE Return: Yes - PE Ship (No Return): No	Yes
Need By	- Return: No - Ship: Yes - DR Return: Yes - PE Return: Yes - PE Ship (No Return): Yes	Yes
Source Organization	- Return: No - Ship: Yes - DR Return: Yes - PE Return: Yes - PE Ship (No Return): Yes	No
Source Subinventory	- Return: No - Ship: Yes - DR Return: Yes - PE Return: Yes - PE Ship (No Return): Yes	No
Requested Ship Date	Return: No	No

Add Part Fields	Service Request or Third Party Service Request Document Type Selected (page also changes based on selected Service Activity)	Work Order or Third Party Work Order Document Type Selected
	• Ship: No • DR Return: No • PE Return: Yes • PE Ship (No Return): Yes	
Shipping Method	• Return: No • Ship: No • DR Return: No • PE Return: Yes • PE Ship (No Return): Yes	No
Ship-to Address Type	• Return: No • Ship: No • DR Return: No • PE Return: No • PE Ship (No Return): No	Yes
Ship-to Customer	• Return: No • Ship: Yes • DR Return: Yes • PE Return: Yes • PE Ship (No Return): Yes	Yes
Ship-to Address	• Return: No • Ship: Yes • DR Return: Yes • PE Return: Yes • PE Ship (No Return): Yes	Yes
Bill-to Customer	• Return: Yes • Ship: Yes • DR Return: Yes • PE Return: Yes • PE Ship (No Return): Yes	No
Bill-to Account	• Return: Yes • Ship: Yes • DR Return: Yes • PE Return: Yes • PE Ship (No Return): Yes	No

Add Part Fields	Service Request or Third Party Service Request Document Type Selected (page also changes based on selected Service Activity)	Work Order or Third Party Work Order Document Type Selected
Bill-to Address	- Return: Yes - Ship: Yes - DR Return: Yes - PE Return: Yes - PE Ship (No Return): Yes	No
Additional Information	- Return: No - Ship: No - DR Return: Yes, if applicable - PE Return: Yes, if applicable - PE Ship (No Return): Yes, if applicable	Yes, if applicable

Related Topics

- [Order and Reserve Parts](#)

Order and Reserve Parts

You can order and reserve parts by submitting an order for the required parts.

After adding parts you'll see the parts in the Parts lines section of the Part Requirements page. Select **Submit Order** to order the parts.

For site-dedicated warehouse, technician, or unmanned warehouse stocking locations, selecting **Submit Order** creates a reservation, and the reservation status appears in the Part Lines region.

Related Topics

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

4 Manage Estimates (Redwood)

Overview of Estimates in Redwood

You can create estimates for service work orders, service requests, depot repair or return material authorizations, third-party service requests, third-party work orders, and without any document.

You can search for existing estimates based on attributes such as estimate number, estimate status, estimate expiration date, document type, document number, item, or asset.

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

To access the **Estimates** search page, click the **Estimates** link in the drawer on the Service Logistics landing page.

Once you find an estimate, click **Manage Estimates**. In the Estimates page, you can review the added parts, labor, expenses, and other related information.

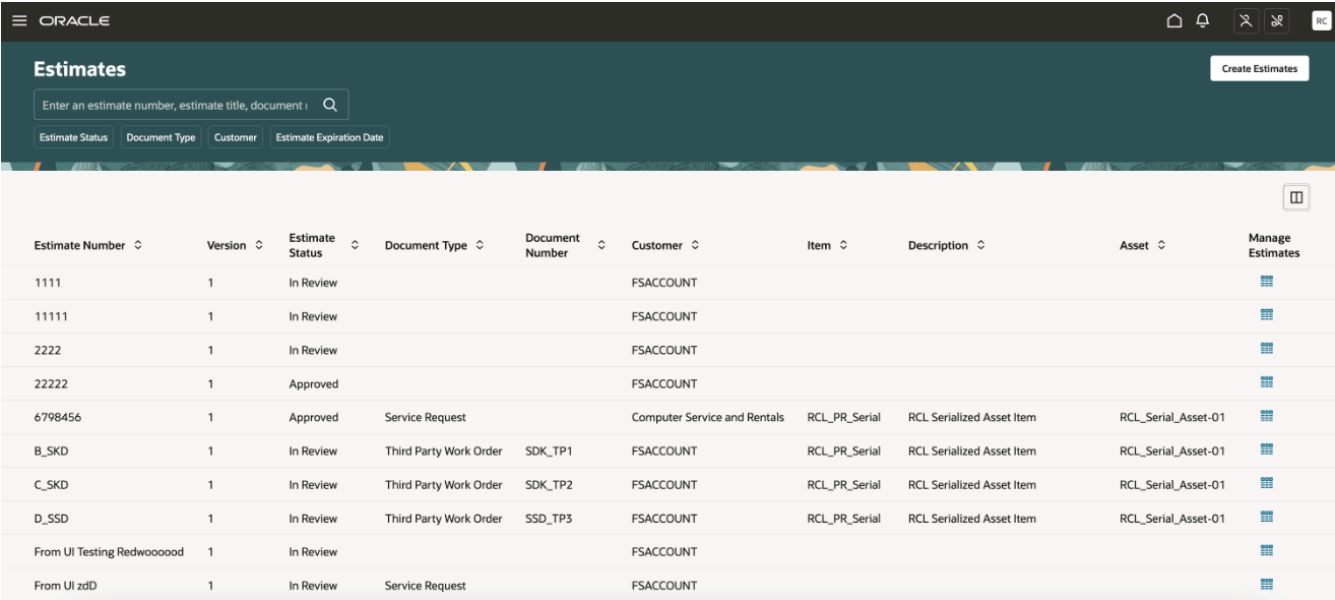
Note:

- If an estimate exists for a service work order or service request, you can access it from the Oracle Customer Experience (CX). CX users can also go to the Estimates page to create an estimate.
- Estimates data before 24D was stored in the RCL_DEBRIEF_HEADERS and RCL_DEBRIEF_HEADER_LINES tables. To migrate that data to the current data model for estimates contact Oracle Support.

Search for Estimates

You can use the Estimates search page to find estimates.

Estimates Search Page



The Estimates search page includes the:

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

These are described in the following table:

Estimates Search

Field Name	Description
Search bar	The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include: • Estimate Status (LOV) • Document Type (LOV) • Customer (LOV) • Estimate Expiration Date (range) You can also enter free text, which will search the following estimates attributes: • Estimate Number • Estimate Title • Document Number • Item • Item Description • Asset Because the application supports autocomplete and fuzzy logic, you can partially type your search terms.

Field Name	Description
Filter Chips suggestions bar	The filter chips appear in 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 estimate's expiration date. You can select this filter chip to filter your results. When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the results table.
Magnifying Glass icon	You can use the Magnifying Glass icon to search for the attributes selected in the search bar.
Estimates results table	The Estimates table lists the estimates 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 estimates are sorted by the estimate number. From the search results, you can go to the Estimates page. To view details: • Select Manage Estimates icon to open the Estimates page. Here you can review the added parts, labor, expenses, and other related information.

Create Estimates

You can use the Estimates search page to create estimates.

To create an estimate from the Estimates search page:

1. Select Create Estimates. This opens the Estimates page.
2. Enter or confirm the estimate title, business unit, and customer. The attribute and LOVs default as described in the following table:

Estimates

Required Fields	Attribute Description
Estimate Title	(Required) Enter free text.
Estimate Type	Select estimate types such as Binding, Not to Exceed, or Nonbinding, which ultimately affects the way charges are handled during posting. ○ Binding: Charges must match the estimate. If the actual charges are less or more than the estimate, then the invoice amount equals the estimate value. ○ Not-to-exceed: Charges can't exceed the estimate amount. If the actual amount is more than estimate, then the estimate amount is invoiced. ○ Nonbinding: Charges can be less or more than the estimate. The estimate is a guess, and the invoice amount equals the actual charge amount. Specifically, you can post charges based on an estimate type for a service work order, service request, or return material authorization.

Required Fields	Attribute Description
	When posting charges from the Work Order Charges, Service Request Charges, and Depot Repair pages, if an approved estimate exists, the estimate type controls charge lines that appear. Note: The estimate type is considered only during the initial charge posting. For later postings, the estimate type is ignored, and invoices are generated based on the actual charge lines. Before reposting charges, ensure that newly added charge lines have the appropriate order setting to prevent unintended invoicing. Using Change Currency or Reprice doesn't affect the automatically generated fixed charge line.
Document Type	Contains LOV values from the ORA_RCL_SOURCE_DOC_TYPE lookup. The predefined values are: ○ Service Work Order ○ Service Request ○ Return Material Authorization ○ Third Party Work Order ○ Third Party Service Request
Document Number	For third party documents a tag value should be defined, such as EC_WO and EC_SR.
Business Unit	(Required) Defaults from service work order, service request, RMA. There's no default for third party work order or third party service request.
Customer	(Required) Defaults from service work order or service request. There's no default for third party work order or third party service request.
Account	Filtered by customer party in Trading Community Architecture (TCA).
Address	Filtered by TCA account sites, with the usage bill-to filtered by account, and associated with an address/reference set that's tied to the business unit.
Item	Set up in the Default Inventory Organization profile option (INV_DEFAULT_ORG_ID). ○ For service work order: Item associated with a work order asset (installed base asset). ○ For service request: Item associated with a service request asset (installed base asset)

Required Fields	Attribute Description
	Search for items based on an item description or item number. When you select Item, a list of eligible items appears. Enter any number of characters from an item's number or description to narrow the list.
Description	Description of the item.
Asset	Defaults if there's an associated asset in the service work order or service request.
Service Address	Defaults from the ship-to party site that's associated with the work order or service request service address ID (HZ_Location), and the debrief header customer party. Null if the work order or service request don't have a service address.
Expiration Date	Select a future date.
Purchase	This is a free text field. If there's a purchase order associated with the service work order or service request, enter that value here.

Note: Depending on your setups you might also see an Additional Information region with flexfields related to estimates.

3. Select Save and Continue to save the estimate header and continue adding estimate details.
4. Select Add Estimate Item to add estimate details. This opens the Add estimate item drawer, so that you can add an estimate line.
 - a. Enter the activity, item, description, quantity, and UOM for the estimate line.
 - b. Select Add (or Add and New, to add another line). The line should display in the estimate.
5. For each added estimate line, select the Amount link to review the amount for the item, the applied subscription coverages, and subscriptions in the Review Charge Amount drawer. In the Review Charge Amount drawer, you can select Edit next to your price to add manual adjustments.

Note: Selecting Edit opens the Estimate item drawer, where you can make your changes. Select Update to confirm your changes and return to the Estimates details page.

6. In the Estimate details page you can:

- Select Edit Details to open the Estimates details drawer, where you can also review the header information, update the estimate status, provide a reason for the status update, and change other attributes.

Note: The values in the Status and Reason lists come from the `ORA_RCL_ESTIMATE_STATUS` and `ORA_RCL_REASON_STATUS` lookups.

- Select Create Version in the Actions list to create a new version of an estimate. A copy of the previous estimate is created, but with two differences, a version number incremented by 1, and a status of Draft. You can change the new estimate version as needed.
- Select Generate PDF in the Actions list to generate a PDF copy of the estimate. You can copy, download, and print the PDF, which you can share with customers and any other interested party.
- Select Send Email in the Actions list to send a copy of the estimate to an interested party using email.
- Select Submit for Approval in the Actions list to submit an eligible estimate for approval.
- Select Create Estimate from Work Definition for an RMA to open the Create Estimate from Work Definition drawer. This drawer can be used to provide the maintenance organization and the work definition. The estimate lines are automatically created from the work definition.

Note: The service activity in the estimate line is derived as follows:

- i. Using the service activity defined for the resource in the work definition.
- ii. Using the activity that's mapped with the resource activity/service activity in the Manage Service Activity setup.
- iii. For the material line, the service activity code is obtained from the `RCL_DEF_DEPOT_SAC_ISSUE` profile option.

7. Select Done to return to the Estimates search page.*Related Topics*

- [Add an Estimate Line](#)

Add an Estimate Line

You can add estimate lines for parts, labor, expenses, and fixed charges to an estimate.

To add an estimate line:

1. From the estimate details page, select Add Estimate Item.
The Add estimate drawer opens.
2. In Activity, select the service activity for the estimate line.
Only enabled service activities are available.
3. In Item LOV, search for and select an item by item number or description.
The available items depend on the selected service activity and your organization's setup. The item description, primary unit of measure, and a default quantity of 1 are populated based on the selected item.
4. If needed, update the quantity.

5. If descriptive flexfields are configured for estimate lines, enter the required information in the Additional Information region.
6. To save the estimate line and enter another line, select Save and Add Another.
The current estimate line is saved and the fields are cleared so that you can enter another line.
7. To save the estimate line and return to the estimate details page, select Add.
8. To close the drawer without saving your changes, select Cancel.

Related Topics

- [Create Estimates](#)

Create Cover Letters for Service Estimates

Create cover letters to confirm estimate details with customers.

You can create cover letters for service estimates and send approval requests to customers by email. The cover includes key estimate elements like the total estimated charge amount, discount value (if applicable), item/asset details, and the estimate number.

To create an estimates cover letter:

1. From the Estimates details page, select the **Send Email** action. This opens the Send Email drawer.
2. Enter the **From**, **To**, and **Cc** fields with email contact details.
3. If the generative AI is enabled, the email subject and body will automatically populate a draft text for the cover letter.
4. You can edit or refine the draft text in the email body.
5. Select the **AI Assist** button, to regenerate the text if needed.
6. After you've reviewed the cover letter, select **Send**.

Both email addresses in the **To** and **Cc** address fields will receive a verification email that includes the generated text.

Submit Estimates for Approval and Review Notifications

You can submit a service estimate for approval from an estimate, or review notifications to approve or reject the estimates.

Submit an Estimate for Approval

To submit an estimate for approval:

1. Open the Estimates search list.
2. Search for the service estimate that you want to submit for approval.
3. Select the estimate to open it.
4. Review the estimate information to confirm it's ready for approval.
5. From the Estimate Details page, select Submit for Approval.

6. Confirm the submission, if prompted.
7. Verify that the estimate status changes to Pending Approval.
8. After submission, the approval workflow sends a notification to the approver configured in the approval rules.

Review a Notification for Approval or Rejection

To review a notification for approval or rejection:

1. Select Notification and open the approval notification for the service estimate.
2. Review the estimate details in the notification, such as estimate number, description, customer, estimate total, business unit, item, asset, and expiration date.
3. If more information is needed, select the link to open the Estimate Details page.
4. Review the estimate details.

Note: While the estimate is pending approval, the page is read-only.
5. Return to the approval notification.
6. Enter approval comments, if required.
7. Select Approve or Reject.
8. Verify that the approval decision is captured by the workflow and the estimate is updated through the approval process.

5 Return Defective and Excess Parts

What's 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'll set up return routing rules to decide 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 decided by the value of the profile option RCL_DEF_RETURN_ORGANIZATION.

Route Customer Returns

To route defective parts returned by the customer:

1. Go 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. In 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 another warehouse.
11. After you've 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'll 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. Select Actions. Select Return.
5. In the Return Part window, either Organization or both Organization and Subinventory 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 In transit between Source and Destination Inventory Organizations.
- Transfer Order Required: Not 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 available quantity and the maximum quantity).

6. The Type defaults based on the Destination Organization that you select, such as Direct Organization Transfer or In-transit Shipment.

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

7. Select the Destination Subinventory and the Destination Locator (if the locator is applicable).
8. For an in-transit transaction, enter a shipment number or select Generate Shipment Number to generate a shipment number.
9. Enter the quantity that you want to return.
10. For a serial-controlled item, enter the serial number of the item.
11. Select 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 help. The organization and subinventory list filters and shows only the stocking locations assigned to you.

6 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 sync 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 predefined 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.
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.

How are taxes calculated?

Service charges are created when the field service debrief lines are created in Service Logistics or from an OFSC integration. Specifically, Service Logistics creates sales orders so that the estimated taxes aren't recalculated by Order Management. The official taxes are calculated in Receivables, which uses the tax determinants passed from Service Logistics to Order Management during pricing.

Note: Service Logistics uses the Get Tax Determinants Tax API (ZxApiPub.getDefaultTaxDetAttribs).

You'll define tax determinants for transactions, exemptions, products, and invoice details that Fusion Tax passes to Pricing.

Tax Determinant Inputs

Tax Determinant	Header/Line	Tax Determinant Inputs
Entity Code	Header	Order
Entity Class Code	Header	SALES_TRANSACTION_TAX_QUOTE
Entity Type Code	Header	ORDER_CREATED
Internal Organization ID	Header	The internal organization ID is the business unit on the Debrief header.

Tax Determinant	Header/Line	Tax Determinant Inputs
		- Field Service: Defaults from Service work order and can't be changed. - Third Party Object: Entered by user on Manage Charges and Estimates page.
Transaction ID	Header	Debrief Header ID
Transaction Date	Header	System date (today's date)
Transaction Currency Code	Header	null
Legal Entity	Header	Business unit's legal entity
Transaction Number	Header	Debrief Header ID
Transaction Business Category	Line	null
Transaction ID and Transaction Line ID	Line	Debrief Header ID
Line Level Action	Line	CREATE
Transaction Line Type	Line	ITEM
Transaction Line Date	Line	System date
Transaction Line Currency Code	Line	null
Line Amount	Line	zero
Unit Price	Line	zero
Transaction Line Quantity	Line	quantity on debrief line
Exemption Control	Line	S (Standard)
Exemption Certificate Number	Line	null
Product ID	Line	Item ID from debrief line (parts, labor, expense, fixed charge)
Product Org ID	Line	From debrief line. Field Service/Third Party Object: - Parts: Inventory Organization where parts were used from or to where they were returned. - Labor, Expense, Fixed Charges: Cost organization on the Debrief/Charges header.
UOM Code	Line	Debrief line
Ship-to Party ID	Line	Customer from Debrief header
Bill-to Party ID	Line	Customer from Debrief line (or header)
Ship-to Party Site ID	Line	Field Service: Service address from Debrief header
Bill-to Party Site ID	Line	null

Tax Determinant	Header/Line	Tax Determinant Inputs
Ship-to Account Site Use ID	Line	null (as ship-to account isn't captured)
Bill-to Account Site Use ID =	Line	Derived from account and bill-to address (account site) entered on the debrief line (or header) and the usage bill-to.

Example: Tax Determinant Output Passed from Fusion Tax to Pricing

Tax Determinants	Example	Tax Determinant Type
Taxation Country	United States	Transaction
Document Fiscal Classification (Document Subtype), such as accounting, taxable goods, standard taxable services	Document subtype: null (accounting, taxable goods, and standard taxable services)	Transaction
First Party Tax Registration, based on registration type, legal reporting unit, tax regime code, tax	4567890 (registration type, legal reporting unit, tax regime code, and tax)	Transaction
Third Party Registration Number	null	Transaction
Transaction Business Category, such as intercompany transaction, trade management	Sales Transaction (Intercompany, Transaction, Trade Management)	Transaction
Tax Classification Code, such as AT VAT standard rate, AT VAT zero rate	VAT20 (VAT Standard Rate, AT VAT Zero Rate) - appears in Pricing Components page.	Transaction
User Defined Fiscal Classification	null	Transaction
Tax Exemption, such as standard or exempt	Standard (Standard or Exempt)	Exemption
Tax Exemption Reason Code, such as hospital, manufacturer, resale, education	null (hospital, manufacturer, resale, education)	Exemption
Tax Exemption Certificate Number	null	Exemption
Product Category, such as cargo transport, professional services, services, software maintenance	null (cargo transport, professional services, services, software maintenance)	Product
Product Type, such as goods (parts and fixed charges) or services (labor and expenses)	Goods (parts and fixed charges) or Services (labor and expenses)	Product
Product Fiscal Classification	-	Product
Intended Use	CPO-INTD1	Product
Tax Invoice Number and Date	null	Tax Invoice Details

Note: Once charges post, they can't be edited.

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 the **Tasks** icon and then click **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 and 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:
 - View the service history and asset details for the work order.
 - Edit the work order charges if debrief transactions have been entered.
 - Review and edit the estimated cost of the work order before it's assigned to the technician.
 - Associate project details to service work orders and third-party work orders (if you've opted in to the Project-Driven Supply Chain feature)
 - 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 can only 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'll see the Charges tab in focus. Similarly, if you clicked on the **Create Estimates** button, you'll 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. Also, 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 decided 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	Other Information	Can you update this field before posting your first charge line?
Document Type	Defaults to the Service Work Order value. This is a required field.	No
Document Number	Defaults from the Fusion Service work order number value passed from the Manage Work Order and Charges page. This is a required field.	No
Technician	Defaults from the Fusion Service work order technician on the Manage Work Order and Charges page. Required to post charges but not to save debrief header.	Yes
Business Unit	Defaults from the Fusion Service business unit on the Manage Work Order and Charges page.	No

Field	Other Information	Can you update this field before posting your first charge line?
	This is a required field.	
Customer	Defaults from the Fusion Service work order or from the debrief header if it already exists. 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. This is a required field.	No
Account	Displays the account from debrief header if it exists. Required to post charges but not to save debrief header.	Yes
Bill-to Address	Defaults from the bill-to address from the debrief header if it exists. 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. Required to post charges but not to save debrief header.	Yes
Item	Displays the asset item from the debrief header if it exists. Defaults from the Fusion service work order from the Manage Work Order and Charges page or the Fusion Service Work Order page. Required to post charges but not to save debrief header.	Yes
Cost Organization	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	Yes

Field	Other Information	Can you update this field before posting your first charge line?
	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 Cost Organization 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. If you change the asset, then the cost organization updates to match the asset's operating organization. This is a required field. Note: 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.	
Cost Subtype	Defaults from the work order subtype of the asset on the debrief/charges header. Change or confirm the cost subtype in the Cost Subtype 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). This is a required field.	Yes

- 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.
1. 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 might be for a task such as calibration or a charge for the technician visit. You'll 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 in 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 the Charges tab.
3. Click 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 with the inventory organization of the technician's default subinventory.
 - **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 page for the Debrief Line Attributes page, for the Expense fields context enter other 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 the Estimates tab.
2. Click 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 lets you 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** checkbox for SACs that you'll use to create correction debrief transactions (costs) and service charges.
 - Don't select the **Update Cost** checkbox 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

To associate a project with service work orders and third-party work orders, select the Project-Driven Supply Chain feature in 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) and 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 key attributes mentioned before, any other attributes that are defined in the Projects setup are also 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 and 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 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.
 - If the billing type for the item is Labor or Material, then the Quantity and UOM fields are enabled.
 - If the billing type is Expense, then the Expense and Currency fields are enabled.
 - 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 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, and 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 might need to edit the estimated price for items before sending the work order estimate to the customer. You might do this to include warrant coverage or other terms in the service contract with the customer. Click 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. Predefined 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 described before 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 don't 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'll be posting the charges. Click the Manage Charges and Estimates icon. The work order will open in the Manage Charges and Estimates page where you'll 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 changed. 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** checkbox 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

*

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

- Fixed Charges 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).
 - 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'll see these values in 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).
 - 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'll 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 on 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 before 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 the amount displayed for each debrief line. For example, click the amount displayed for item Labor.

5. 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

Done

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

The covered level types supported for subscriptions are:

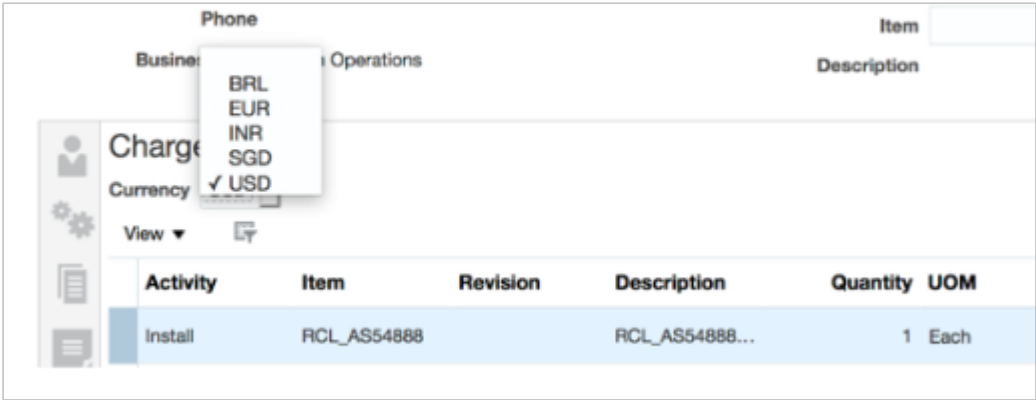
- Asset
- Customer Account
- Party
- Party Site
- Item

6. You might need to manually adjust the prices when there's a discrepancy between the promised customer price and the final amount returned by Pricing, or to provide further discounts. To adjust the price of any item, 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. Predefined 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:

 - Charges haven't yet been posted.
 - The Allow manual adjustment checkbox 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 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've reviewed all charges and completed the prices, Click **Post Charges**.

When a service request has work orders from different business units, the Post Charges program creates one sales order for the service request business unit, which includes charges from all work orders with the same business unit. It then creates a sales order for every work order that has a different business unit.

For bill-only sales orders, Service Logistics populates the sale order line's fulfillment organization from the organization on the debrief line, and the item definition organization on the sales order line defaults from the Order Management REST.

9. Field service administrators dealing with a large volume of work orders on a daily basis might review charges for a work order and then select the **Post Charges and Close** button and move on to the next work order. This

button starts a background job to post the charges and then closes the Manage Work Orders and Charges page.

Note: When you post charges, Service Logistics creates a maintenance work order for each new asset that you've debriefed. Let's look at some examples where a technician debriefs work against customer assets to understand when maintenance work orders and transactions are created.

Examples: Create a Maintenance Work Order for New Assets

Example	Results
Create a debrief with six lines that includes two different assets. The header has no asset.	Two work orders are created, and the transaction records are created.
Add a new debrief line with an asset that exists in lines that have already posted.	A new work order isn't created. Only transaction records are created.
Add a new debrief line with an asset that doesn't exist in lines that have already posted.	A new work order is created, and transaction records are created.
Add three new debrief lines with: a. An asset that already exists b. A new asset c. No asset	a. A new work order isn't created. Only transaction records are created. b. A new work order is created and transaction records are created. c. A new work order is created with a fallback asset, because there's no asset at the line and header levels, and transaction records are created.
Create a header with an asset and create a line without an asset.	The header-level asset isn't considered. A new work order is created, and the transaction records are created.

10. If you don't have the Post Charges privilege assigned, you won't see the **Post Charges** button. Instead, you'll see the **Complete Debrief** button.

11. Select **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.

Usually, 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 **View**, then **Columns**. Select the checkboxes for customer, account, and bill-to address.
3. To charge a different customer for an expense incurred, select the debrief line, and click the **Bill To Details** icon that's displayed on that debrief line. The Bill to Details dialog box appears. You'll 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've opted in to this feature, you'll 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 review 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.

7 Manage Work Order Charges (Redwood)

Overview of Work Order Charges in Redwood

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

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 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.

Work Order Charges Search Page

< Work Order Charges

Create Charge

Debrief Sta... New × Try a debrief status, service request number, customer, asset number, or technician

VD Requested Date 18/02/26 - 18/02/26 Scheduled Date 18/02/26 - 18/02/26 Work Order Status Scheduled (1)

17 items

Document Number	Work Ord...	Service Request...	Customer	Debrief Status	Asset Number	Technician	Mar Cha
0000021021	Started	SR0000080208	FSACCOUNT	New	RCL_AS54888_PM	Fred Bramer	
0000021022	Started	SR0000080207	FSACCOUNT	New			
0000015016	Started	SR0000054123	Computer Service and Rentals	New	RCL_AS54888_A1		
0000015015	Started	SR0000054122	Computer Service and Rentals	New	RCL_AS54888_A2		
0000014014		SR0000053122	FSACCOUNT	New	FS_Asset_Test_01	Fred Bramer	

Prerequisite: To use the elastic search on the Work Order Charges search page, you might 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	Note: Technicians will only see the work order charges assigned to them. The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include: • Work Order Area (LOV: Filters by the work area on the Fusion Service work order that's associated with the charges. It doesn't apply to third-party work order charges). • Debrief Status (LOV) • Resolution Due Date (range) • Work Order Status (LOV: Filters by the status of the Fusion Service work order that's associated with the charges. It doesn't apply to third-party work order charges). • Requested Date (range) • Scheduled Date (range) By default, the search page lists searches for charges associated with field service work orders and third-party work orders using the following criteria: • Work area: No default • Debrief status: New • Resolution date: No default You can search for a value directly by entering it the input field, Try a debrief status, service request number, customer, asset number, or technician. For example, enter free text, which searches the following work order charges attributes: • Customer • Technician • Item • Asset Number • Document Number

Field Name	Description
	• Service Request Number • Serial Number • Work Order Type • Purchase Order Number • Customer Account • Business Unit Because the application supports autocomplete and fuzzy logic, you can partially type your search terms. The following attributes support autocomplete: • Customer • Technician • Item Number • Serial Number The following attributes support fuzzy logic: • Customer • Technician
Field Chips suggestion bar	The filter chips appear in 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. 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.
Magnifying Glass icon	You can use the Magnifying Glass icon to filter your results based on predefined filter chips and their associated values. Specifically, the magnifying glass shows filter chips with preselected values. Some examples are: • Debrief status: New • Work Order Status: Scheduled • Resolution Date: This Year
Charges results table	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. To edit existing work order charges, you can open the Work Order Charges details page by selecting the Manage Charges icon. Then, select the Asset link in the Work Order Charges details page and navigate to the Maintenance Asset Overview page. To enter new charge lines, you can open the Work Order Charges header page by selecting the Create Charge button.

Create Work Order Charges

You can use the Work Order Charges Search page 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 work order debrief transactions from the Work Order Charges search page:

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

Work Order Charges Page

ORACLE

Work Order Charges

CancelCreate and CloseCreate and Continue

Work Order

Document Type

Third Party Work Order

Document Number

TPWO 12345

Customer

Customer

FSACCOUNT

Bill-to Customer

FSACCOUNT

Bill-to Account

CDRM_168203

Purchase Order

Business Unit

Vision Operations

Bill-to Address

1111 14th st,DENVER, CO 80202

Service Address

Incident Reported Date

20/03/26 05:23 AM

Payments

Payment Method

Credit Card

View Credit Card

Asset

Item

Description

Asset Number

Serial Number

Cost Organization

Cost Subtype

Required

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

Work Order Charges

Required Fields	Default Value
Work Order	
Document Type	Defaults to Service Work Order when the page is opened from the Work Order Charges page or the B2B Service Work Order page.
Document Number	No default value.
Customer	

Required Fields	Default Value
Customer	Defaults from B2B work order.
Bill-to Customer	Bill-to information defaults from the work order into the field service charges.
Bill-to Account	Defaults from B2B work order.
Bill-to Address	Defaults from B2B work order.
Purchase Order	No default value.
Service Address	Defaults from B2B work order.
Incident Reported Date	No default value. Select a value in the Incident Reported Date field and that date is used to calculate charges. It's an optional field, if you don't choose a date, it defaults from the service request reported date.
Business Unit	Defaults from the B2B work order business unit. No default value for third-party work orders.
Item	You can search for items based on an item description or item number. When you select the Item field, a list of eligible items appears. Enter any number of characters from an item's number or description to narrow the list.
Description	Read-only field that shows the item description.
Payments	
Payment Method	Select either Credit Card or On Account from the LOV. When you select Credit Card , the Credit card drawer opens so you can enter the card details.
View Credit Card button	The button becomes enabled once the credit card has been captured.
Asset	
Asset Number	Defaults from B2B work order.
Serial Number (required for serialized assets)	No default value.

Required Fields	Default Value
Cost Organization	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.
Cost Subtype	Defaults from debrief header asset's work order type.
Technician	
Technician	Defaults from the B2B work order, if one exists.

3. Select **Create and Close** to create only the debrief header.
4. Select **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. Go to the service request associated with the work order by selecting the **View Service Request** button in the header region.
2. Open the associated detail page by selecting the **Document Number** link for the work order.
3. Open the associated detail page by selecting the **Asset** link for the work order.
4. Access the Service Request Charges page by selecting the **Review Service Request Charges** button.
5. View a summary of total charges and the currency in the Charges table.
6. Select the **Asset** link to navigate to the Maintenance Asset Overview page.
7. Select 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, and 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 change a work order's descriptive flexfields until you've posted your charges.

You can use the [Work Order Charges Search](#) page to access the [Work Order Charges detail](#) page. Here you can edit charges before you post them.

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

Work Order Charges Details Page:

2. Before posting charges, in the Work Order table:
 - Review the work order header information.
 - Edit the header details by selecting Edit.
 - You can update Service Address on the Edit Work Order Charges page. It defaults from the associated service work order. Select any ship-to addresses to calculate sales taxes, when you're pricing field service charges. If you update the service address, all charge lines will be repriced. After the charges post, the service address is used for the sales order ship-to addresses, and passed to Accounts Receivable for calculating sales tax.
 - Charge lines are also repriced when you update the asset on debrief header as it might have a different subscription coverage.
3. Select Asset to navigate to the Maintenance Asset Overview page.
4. Add new charges by selecting Add Charges in the Work Order section.

5. In the Charges table, edit an existing charge by selecting Edit at the line level for any charge line.

Note: If an approved estimate exists, details of the estimate appear in the Charges table for service request and depot repair charges.

6. Add and edit manual adjustments to the charge lines by selecting Your Price.
7. Review the applied adjustments by selecting Amount.
8. Optionally, update any charge line that hasn't posted by selecting Edit for that charge line.
9. Reprice the charge lines based on your pricing strategy setup by selecting Reprice.
10. Select an action to add charges to the work order, such as parts, labor, and expenses:

- a. Add Part: Opens the Add part details drawer. Enter details and select Add.

You can search for items based on an item description or item number. When you select in Item, a list of eligible items appears. Enter any number of characters from an item's number or description to narrow the list.

Note: For serial-controlled returned items, the Serial Number field appears during material return debrief and lets users either select a valid serial number from a list of values or enter one manually. The list shows serial numbers from Asset Tracking or Installed Base for asset-tracked items, and from the Inventory Serial Master for serial-tracked items that aren't asset tracked. Manual entries are allowed, but they aren't validated.

- b. Add Labor: Opens the Add Labor drawer. Enter details and select Add.

You can search for labor items based on an item description or an item number. When you select Item, a list of eligible items appear. Enter any number of characters from an item's number or description to narrow the list.

- c. Add Expense: Opens the Add expense details drawer. Enter details and select Add.

Some things to consider when adding expenses:

- You can search for expense items based on an item description or an item number. When you select Item, a list of eligible items appear. Enter any number of characters from an item's number or description to narrow the list.
- You can associate purchase requisition lines to service work order expense charges to capture all the work order's costs and bill the customer for the services and/or materials purchased for the service work order:
 - o Select the purchase requisition and purchase requisition line. The requisition line has a list of values (LOV) that shows the requisition item (if one is entered), the supplier, and the requisition amount.

If the requisition has an item, it defaults, along with the quantity and UOM.

If there isn't an item on the requisition, the UOM defaults from the currency on the requisition and the quantity defaults from the requisition amount. In this case, you must select the item that will be used to capture costs and bill the customer when the charges are posted.

Note: You can use a service activity code that captures the costs without billing the customer if you aren't passing along the requisition costs to the end customer.

- o When these expense charges are created, the price is calculated and the charge appears along with the associated requisition and line numbers in the Work Order Charges page along with the requisition number within the Charges section.

Both item and nonitem purchase requisitions are supported. The purchase requisition line is used to default expense attributes. You can also select Requisition Number to open the Requisition Detail UI.

- You can capture the asset worked on when creating parts, labor, and expense debrief transactions, which allows the technician to debrief work on multiple customer assets on a single service work order. This asset is used to get subscription coverage when calculating charges. Posting costs results in the creation of a maintenance work order (MWO) for each asset debriefed, ensuring the installed base and asset tracking configurations update correctly.

The following level types are supported for subscriptions:

- o Asset
 - o Customer Account
 - o Party
 - o Party Site
 - o Product
- d. Add Fixed Charge: Opens the Add fixed charge details drawer. Enter details and select Add.
- e. Change the currency for charge lines and view the price and amount in your desired currency based on your pricing strategy by selecting Change Currency.
- f. Post the work order charges by selecting Post Charges and Close.

If an approved estimate exists, the estimate type controls the charge lines that appear for the work order.

Note: The estimate type only controls the charge lines when posting charges for the first time. The actual charges are posted if charges are posted more than once.

When a service request has work orders from different business units, the Post Charges program creates one sales order for the service request business unit, which includes charges from all work orders with the same business unit. It then creates a sales order for every work order that has a different business unit.

When you post charges, Service Logistics creates a maintenance work order for each new asset that you've debriefed.

Let's look at some examples where a technician debriefs work against customer assets to understand when maintenance work orders and transactions are created.

Examples: Create a Maintenance Work Order for New Assets

Example	Results
Create a debrief with six lines that includes two different assets. The header has no asset.	Two work orders are created, and the transaction records are created.
Add a new debrief line with an asset that exists in lines that have already posted.	A new work order isn't created. Only transaction records are created.

Add a new debrief line with an asset that doesn't exist in lines that have already posted.	A new work order is created, and transaction records are created.
Add three new debrief lines with: i. An asset that already exists ii. A new asset iii. No asset	i. A new work order isn't created. Only transaction records are created. ii. A new work order is created and transaction records are created. iii. A new work order is created with a fallback asset, because there's no asset at the line and header levels, and transaction records are created.
Create a header with an asset and create a line without an asset.	The header-level asset isn't considered. A new work order is created, and the transaction records are created.

You can use the following table to understand how maintenance work order numbers are formatted.

Maintenance Work Order Numbers

Process	Maintenance Work Order Number Format
Create Depot Repair Maintenance Work Order	RCL_ + RMA number + RMA line number
Post Costs for Preventive Maintenance Work Order (field service and generic)	Maintenance work order number created in Maintenance.
Post Costs for Service Request Field Service Work Order	RCL_ + Service work order number
Post Costs for Service Request Generic Work Order	RCL_ + Service work order number
Post Costs for Stand Alone Field Service Work Order	RCL_EC_WO_ + Service work order number
Post Costs for Stand Alone Generic Work Order	RCL_EC_WO_ + Service work order number
Post Costs for Third-party Work Order	RCL_OTHER_ + Third-party work order number

Add a Credit Card to Work Order Charges

You can add a customer credit card to service work order charges.

On the Work Order Charges page, you can select **Credit Card** as the payment method and add or select a customer credit card. Previously, only On Account was supported as a payment method.

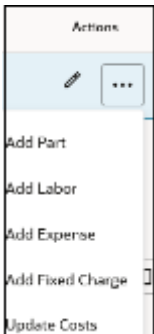
To add a credit card to a service work order:

1. Go to the Work Order Charges header page.
2. In the Payment Method field, select **Credit Card**.
3. When the Credit card drawer opens, review any existing credit cards associated with the customer's bill-to address.
4. If needed, select the option to add a new credit card.
5. Enter the required credit card information.
6. Select **Add**.
7. Confirm that the new credit card appears in the Credit card drawer.

Note: After you post the charges, the system creates the bill-only sales order and authorizes the selected credit card for the total or additional charge amount. The authorization and credit card information are added to the sales order, but the customer's card is not actually charged until the invoice is created in Accounts Receivable.

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.

Capture Meter Readings

You can view asset meters and capture meter readings in the Work Order Charges page.

To view and capture meter readings:

1. On the Work Orders Charges page, select the **View Meters** action from the actions menu for your work order.

This opens the View Meters page. There are two pages, Meters and View Meter History.

2. On the Meters page, you'll see the following:
 - o Meter Name
 - o Displayed Reading
 - o Life-to-Date Reading
 - o Last Reading Date
3. To create a new meter reading, select the **Edit** action from the action menu. This opens the **Meter Readings** page, where you can create a new meter reading.

The following information defaults for your meter reading based on the setups:

- o Meter Name
- o Meter Code
- o Meter Type
- o Reading Type
- o Direction (ascending or descending)

4. Enter the following for you new reading:
 - a. In the **Reading Date-Time** calendar, select a date and time.
 - b. In the **New Reading** field, enter a value.

Note: You can also choose to reset the reading and add a comment.
 - c. **Save.**
5. To see all of the readings for your meter, including your most recent entry, select the **View Meter History** action from the action menu. You'll also see the net change between readings here.

Capture Quality Events for Broken Parts

You can capture quality events to record inspection results for broken parts in work order charges.

Use a predefined inspection plan that applies to the asset or by performing an inspection without a predefined plan. You can also review inspection history to see details of previously recorded quality events.

Note: Inspection plans should be defined in Quality Management using the Create New Inspection Plans page.

- The inspection type should be **Asset** for the plans to be listed in Work Order Charges page.
- The plans shouldn't have any applicability conditions defined.

Capture Inspection Results from the Work Orders UI

Use this procedure to capture inspection results for a debrief asset from Work Order Charges.

1. Navigate to the applicable work order and open the Work Order Charges page.
2. Locate the charge associated with the debrief asset that you want to inspect.
3. From the available actions, select **Inspection Plans**.
4. Review the list of inspection plans applicable to the debrief asset.
5. Select the inspection plan that you want to use.

Alternatively, select the option to perform an inspection when you want to capture inspection results without using a predefined inspection plan.

6. On the Enter Inspection Results page, enter the inspection information.
7. Review the inspection information and save the results. If needed, you can view the inspection history for the applicable plan to review details of previously captured quality events.

Create Corrections that Reference Original Charges

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 to review work orders associated with a service request, and all 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 all 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 go 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:
 - **Add Part**
 - **Add Labor**
 - **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.

How Service Recognition is Calculated for Coverage Adjustments

When you submit the Post Charges program, cost recognition calculations will consider coverage adjustment types.

Cost recognition records are created and these calculations are one step in the process. The calculation are as follows:

Cost Recognition Percentages by Adjustment Type

Adjustment Type	Cost Recognition Percentage
Discount Amount	Calculated as Subscription Discount Amount/List Price x 100.
Markup Amount	Set to 100% just like we do for Markup Percent coverage.
Price Override	Set to 100%.
Discount Percent	Set to discount percent.
Markup Percent	Set to 100%.

A debrief/charge line can have multiple coverage adjustments if the asset being serviced is listed in multiple subscriptions or when a subscription coverage has more than one adjustment with the same business process, service activity code and billing type.

These combinations are used by the Post Charges program to create records in the Cost Recognition table:

- Discount Amount + Discount Percent(s): Creates one cost recognition record for each adjustment.
- Markup Amount + Markup Percent: Creates one cost recognition record for the first adjustment with 100% cost recognition.
- Price Override (used alone): Creates one cost recognition record with 100% cost recognition.
- Discount Percent: Creates one cost recognition record for each subscription, with its cost recognition percent equal to the discount percent.
- Markup Percent: Creates one cost recognition record with 100% cost recognition.

These combinations will create errors in the ESS job log:

- Mixing discounts with markups (amount or percent): No record created in the Cost Recognition Table.
- Any discount or markup combined with a Price Override: No record created in the Cost Recognition Table.

The following subscription coverage levels are supported:

- Asset (asset on debrief header or line)
- Customer Account (debrief header)
- Customer Party (sold-to customer on debrief header)
- Customer Party Site (service address on debrief header)
- Product/Item (from asset on debrief header)

8 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

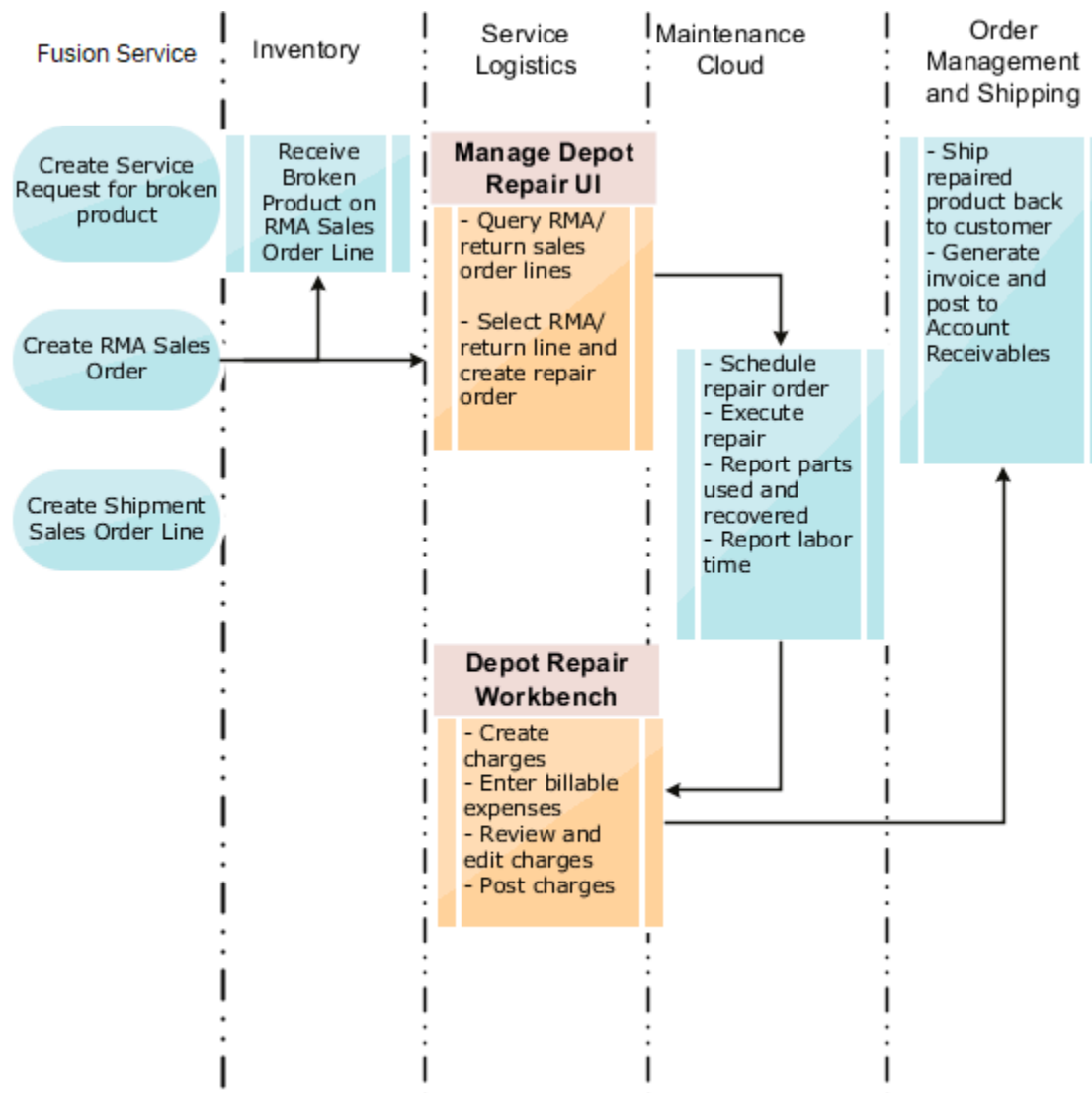
The Manage Depot Repair page in Service Logistics enables you to manage the complete end-to-end work flow of a repair depot. It gives you access to and visibility of all the existing and ongoing RMAs in a depot repair organization. The page also displays depot repair RMAs for assets that have passed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

Depot Repair

The Depot Repair page 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 page 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 with 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 destination organization of the RMA. 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 to create charges in the Depot Repair page.
- The Depot Repair Manager will click the **Create Charges** button in the Depot Repair page 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 page.
- 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 might 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 might be shipped back to the local warehouse or directly to the customer. In Service Logistics, you'll create transfer orders to move the broken asset across multiple locations. The transfers orders are created in the Depot Repair page and linked to the Depot Repair RMA. Support engineers can directly access the Depot Repair page from the Service Request Details page and track the movement of the broken asset through its life cycle. 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 might need to do so in the following scenarios:

- When there are mistakes in an existing work order that need to be corrected, for example, incorrect 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 page. 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 predefined business process 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 can create the RMA and 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'll use this to add the labor and parts that were used during repair.

How are Taxes Calculated During the Pricing of Service Charges?

Service charges are created when the depot repair debrief lines are created in Service Logistics. Specifically, Service Logistics creates sales orders so that the estimated taxes aren't recalculated by Order Management. The official taxes are calculated in Receivables, which uses the tax determinants passed from Service Logistics to Order Management during pricing.

Note: Service Logistics uses the Get Tax Determinants Tax API (ZxApiPub.getDefaultTaxDetAttribs).

You'll define tax determinants for transactions, exemptions, products, and invoice details that Fusion Tax passes to Pricing.

Tax Determinants Inputs

Tax Determinant	Header/Line	Tax Determinant Inputs
Entity Code	Header	Order
Entity Class Code	Header	SALES_TRANSACTION_TAX_QUOTE
Entity Type Code	Header	ORDER_CREATED
Internal Organization ID	Header	The internal organization ID is the business unit on the debrief header. Depot Repair: Defaults from RMA sales order line and can't be changed.
Transaction ID	Header	Debrief Header ID
Transaction Date	Header	System date (today's date)
Transaction Currency Code	Header	null
Legal Entity	Header	Business unit's legal entity
Transaction Number	Header	Debrief Header ID
Transaction Business Category	Line	null
Transaction ID and Transaction Line ID	Line	Debrief Header ID
Line Level Action	Line	CREATE
Transaction Line Type	Line	ITEM
Transaction Line Date	Line	System date
Transaction Line Currency Code	Line	null
Line Amount	Line	zero

Tax Determinant	Header/Line	Tax Determinant Inputs
Unit Price	Line	zero
Transaction Line Quantity	Line	quantity on debrief line
Exemption Control	Line	S (Standard)
Exemption Certificate Number	Line	null
Product ID	Line	Item ID from debrief line (parts, labor, expense, fixed charge)
Product Org ID	Line	From debrief line: Depot Repair: Repair maintenance work order organization
UOM Code	Line	Debrief line
Ship-to Party ID	Line	Customer from Debrief header
Bill-to Party ID	Line	Customer from Debrief line (or header)
Ship-to Party Site ID	Line	Depot Repair: Bill-to address
Bill-to Party Site ID	Line	null
Ship-to Account Site Use ID	Line	null (as ship-to account isn't captured)
Bill-to Account Site Use ID	Line	Derived from account and bill-to address (account site) entered on the debrief line (or header) and the usage bill-to.

Example: Tax Determinant Output Passed from Fusion Tax to Pricing

Tax Determinants	Example	Tax Determinant Type
Taxation Country	United States	Transaction
Document Fiscal Classification (Document Subtype), such as accounting, taxable goods, standard taxable services	Document subtype: null (accounting, taxable goods, and standard taxable services)	Transaction
First Party Tax Registration, based on registration type, legal reporting unit, tax regime code, tax	4567890 (registration type, legal reporting unit, tax regime code, and tax)	Transaction
Third Party Registration Number	null	Transaction
Transaction Business Category, such as intercompany transaction, trade management	Sales Transaction (Intercompany, Transaction, Trade Management)	Transaction
Tax Classification Code, such as AT VAT standard rate, AT VAT zero rate	VAT20 (VAT Standard Rate, AT VAT Zero Rate) - appears in Pricing Components UI	Transaction
User Defined Fiscal Classification	null	Transaction

Tax Determinants	Example	Tax Determinant Type
Tax Exemption, such as standard or exempt	Standard (Standard or Exempt)	Exemption
Tax Exemption Reason Code, such as hospital, manufacturer, resale, education	null (hospital, manufacturer, resale, education)	Exemption
Tax Exemption Certificate Number	null	Exemption
Product Category, such as cargo transport, professional services, services, software maintenance	null (cargo transport, professional services, services, software maintenance)	Product
Product Type, such as goods (parts and fixed charges) or services (labor and expenses)	Goods (parts and fixed charges) or Services (labor and expenses)	Product
Product Fiscal Classification	-	Product
Intended Use	CPO-INTD1	Product
Tax Invoice Number and Date	null	Tax Invoice Details

Note: Once charges post, they can't be edited.

Create Depot Repair Return Material Authorizations (RMAs)

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

Note: You can create depot repair RMAs (sales order returns) with quantities more than one for serial-tracked items and asset-tracked items. The serial numbers received for the RMA can be selected in the Create Repair Work Order page and appear in the Depot Repair page.

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 start 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 start 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 with a 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 and 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 page.

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'll 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 Unreleased , Released , On Hold , Completed , Closed , and Canceled .
Type	The maintenance work order type.
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 decides 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 key attributes mentioned before, any other 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've opted in to the Project-Driven Supply Chain feature and completed the required integration setups with Projects.

Access the Depot Repair page:

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

Process a Repair RMA in Depot Repair

The Depot Repair page 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 and 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 page and view the workflow for a specific broken asset, select the RMA Line link.

Main features of the Depot Repair page:

- 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.
 - Select the work order number to open the Edit Work Order page and view the work order details.
 - Select the service request number to access the Edit Service Request page and view the service request details.
 - Select 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'll 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 and the shipment sales order lines for the repair RMA return.
- The History tab lets you view the product service history. Here you can select 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, select 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 page.
- Review the debrief and add any other 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.

Note: For bill-only sales orders, Service Logistics populates the sale order line's fulfillment organization from the organization on the debrief line, and the item definition organization on the sales order line defaults from the Order Management REST.

Support engineers and customer service representatives can access the Depot Repair page 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 page, select 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 multistep depot repair and return workflow. There might be more than one transfer order for a single asset if it must 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 page to create transfer orders to ship broken assets to repair depots or distribution centers. They'll use the Manage Depot Repair page to query all their inbound RMAs.

In a distribution center, the manager will use the Depot Repair page 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 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 page is used to create transfer orders to ship repaired assets to local offices or warehouses. The Logistics tab in the Depot Repair page 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 page for the selected RMA Line.
3. Go to the Logistics tab.
4. Click 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 later.
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'll 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'll 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 page.

This is especially useful for support engineers who can open the Depot Repair page directly from Fusion Service (SR Parts tab) and create estimates to provide to the customer and 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 page.
2. Click the Estimates tab.
3. To add an estimate line, click the Create (+) button. The Add Estimates window opens. All 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.
 - If the billing type for the item is Labor or Material, then the Quantity and UOM fields are enabled.
 - If the billing type is Expense, then the Expense and Currency fields are enabled.
 - 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 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, and 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 might need to edit the estimated price for items before sending the work order estimate to the customer. You might do this to include warrant coverage or other terms in the service contract with the customer. Click 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. Predefined 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 page and start 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.

Subscription coverage is derived from the work order asset on the debrief header. The covered level types supported for subscriptions are:

- Asset
 - Customer Account
 - Party
 - Party Site
 - Product
4. Note:
 - The information in the Labor tab is read only.
 - You can add debrief lines to report any other expenses in the Expenses tab. You can edit and delete expense lines until the charges are posted.
 - You can update the service activity code in the Parts tab to reprice the debrief line before posting the charges.
 - 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 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) and the repair charges (parts, labor, expenses, fixed charges).
9. Depot repair managers dealing with a large volume of work orders on a daily basis might 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 starts a background job to post the charges and then close the Depot Repair page.

9 Manage Depot Repair (Redwood)

Overview of Depot Repair in Redwood

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

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.

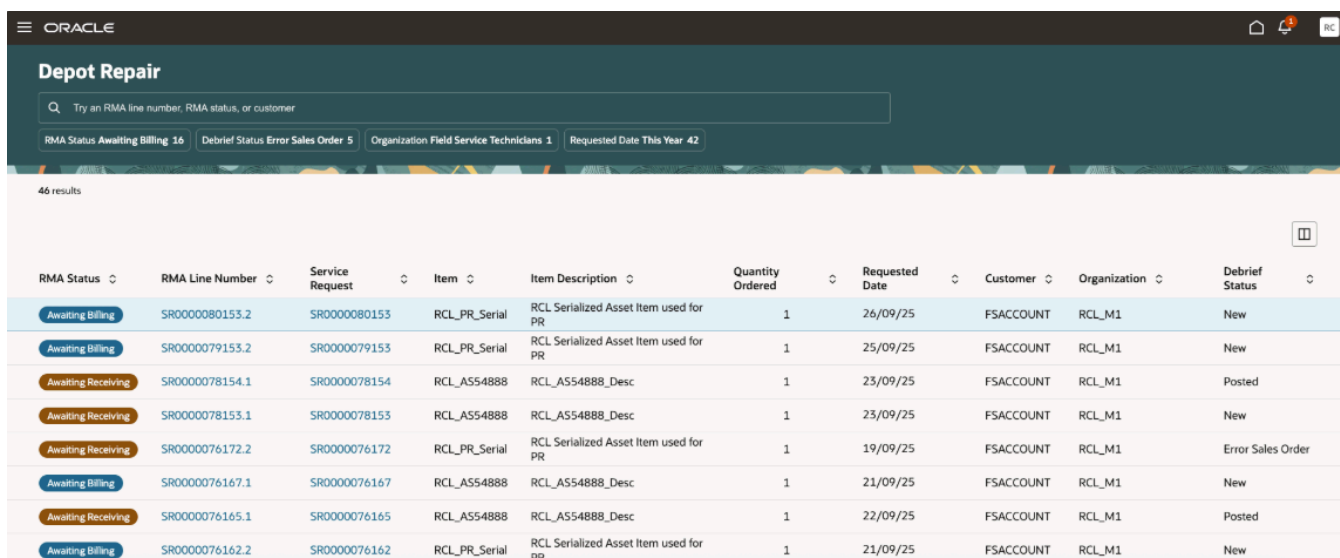
You can refine the search by adding, updating, or removing attributes as required.

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 to find RMAs.

Depot Repair Search Page



The screenshot shows the Oracle Depot Repair search page. At the top, there is a search bar with the placeholder text "Try an RMA line number, RMA status, or customer". Below the search bar, there are several filter buttons: "RMA Status Awaiting Billing 16", "Debrief Status Error Sales Order 5", "Organization Field Service Technicians 1", and "Requested Date This Year 42". The table displays 46 results. The columns are: RMA Status, RMA Line Number, Service Request, Item, Item Description, Quantity Ordered, Requested Date, Customer, Organization, and Debrief Status. The table contains 10 rows of data, each with a status button (Awaiting Billing or Awaiting Receiving) in the first column.

RMA Status	RMA Line Number	Service Request	Item	Item Description	Quantity Ordered	Requested Date	Customer	Organization	Debrief Status
Awaiting Billing	SR0000080153.2	SR0000080153	RCL_PR_Serial	RCL Serialized Asset Item used for PR	1	26/09/25	FSACCOUNT	RCL_M1	New
Awaiting Billing	SR0000079153.2	SR0000079153	RCL_PR_Serial	RCL Serialized Asset Item used for PR	1	25/09/25	FSACCOUNT	RCL_M1	New
Awaiting Receiving	SR0000078154.1	SR0000078154	RCL_AS54888	RCL_AS54888_Desc	1	23/09/25	FSACCOUNT	RCL_M1	Posted
Awaiting Receiving	SR0000078153.1	SR0000078153	RCL_AS54888	RCL_AS54888_Desc	1	23/09/25	FSACCOUNT	RCL_M1	New
Awaiting Receiving	SR0000076172.2	SR0000076172	RCL_PR_Serial	RCL Serialized Asset Item used for PR	1	19/09/25	FSACCOUNT	RCL_M1	Error Sales Order
Awaiting Billing	SR0000076167.1	SR0000076167	RCL_AS54888	RCL_AS54888_Desc	1	21/09/25	FSACCOUNT	RCL_M1	New
Awaiting Receiving	SR0000076165.1	SR0000076165	RCL_AS54888	RCL_AS54888_Desc	1	22/09/25	FSACCOUNT	RCL_M1	Posted
Awaiting Billing	SR0000076162.2	SR0000076162	RCL_PR_Serial	RCL Serialized Asset Item used for PR	1	21/09/25	FSACCOUNT	RCL_M1	New

Prerequisite: To use the elastic search on the Depot Repair search page, you might 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-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	The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include: • Debrief Status (LOV) • RMA Status (LOV) • Organization (LOV) • Requested Date (range) By default, the search page lists lines that include transactions in the following statuses: • RMA Status: Received • Debrief Status: New You can search for a value directly by entering it in the input field, Try an RMA line number, RMA status, or customer. For example, enter free text, which searches the following RMA attributes: • RMA • Service Request • Item • Description • Customer • Organization Because the application supports autocomplete and fuzzy logic, you can partially type your search terms. The following attributes support autocomplete: • Item • Description • Customer The following attributes support fuzzy logic: • Description • Customer

Field Name	Description
Filter Chips suggestions bar	The filter chips appear in 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. When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the results table.
Magnifying Glass icon	You can use the Magnifying Glass icon to filter your results based on predefined filter chips and their associated values. Specifically, the magnifying glass shows filter chips with preselected values. Some examples are: • RMA Status: Awaiting Billing • Debrief Status: New • Organization: RCL_M1 • Requested Date: This quarter
RMA Lines results table	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. From the search results, you can go to the details pages. To view details: • Select an RMA Line Number link for the Depot Repair details page. • Select a Service Request link for Service Request details page.

Manage Repair Orders from Depot Repair

You can access the Depot Repair page to manage the repair and return of RMA lines.

Note: 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, select a RMA Line Number from the Depot Repair search results.
2. To open the Service Request page, select a Service Request to go to the Service Request page.
3. To view Depot Repair details:
 - Posted debrief: Select View Details to open the Depot Repair details drawer and view the debrief details.
4. In the Logistics region, select Create Transfer Order to move the returned parts and products through the repair supply chain.

Note: You can select Refresh to refresh the Logistics region.

For lines in the Logistics region, you can:

- Select Cancel Shipment Order to cancel the shipment order line.
- Select Manage Reservations to open the Manage Reservations drawer. Here you can create serial number inventory reservations to ensure the correct repaired product or part is shipped to the intended customer. When you create serial number reservations, the serial number is printed on the pick list, so the warehouse knows the specific product or part to ship.

Note: This action is only enabled for sales order shipments (not for transfer order shipments).

To delete a serial number inventory reservation, select the trash can icon associated with that serial number. Once you delete a serial number, you can select that serial number for a future reservation from the list of values.

- Select the pencil icon to reduce the number in the Order Quantity field for the shipment line. You might do this if the number of repaired parts to send back to the customer is less than the quantity of the original return material authorization (RMA). This sometimes occurs with a short shipment by the customer or when you can't repair parts or products.

5. In the Assets region, select Asset to navigate to the Maintenance Asset Overview page.

6. In the Repair Orders region:

- To create or cancel a repair work order required for a returned asset, select Create Repair Order. This opens the Create Repair Order drawer where you can:
 - Create a repair work order with one or more serial-tracked assets with the same item number. You can only create repair work orders for a quantity less than the RMA/return sales order quantity.

Note: To add multiple assets on a work order, you must enter the assets in a new tab within the Maintenance Work Order page. If you only have one asset to repair, you'll select the asset on the Depot Repair Create Repair Order page.

- Enter a work order description.
- Capture project-related details using descriptive flexfields in a project-enabled organization, if the descriptive flexfields are set up.
- Create a depot repair work order for asset transformations like product upgrades or the retrofitting of assets by enhancing them.
 - a. In the Create Work Order page, create a repair work order for an asset. From the Target Item list, select a serialized asset item (which will be the transformed asset item upon completion of the work order).
 - b. After creating the repair work order in Service Logistics, you can perform work order activities in Maintenance Cloud. In the General tab of the Edit Work Order page, the

Completion Information header displays the transforming work order details, including the target item entered in Service Logistics

A serial number is generated for the target item and the transformed asset is returned to inventory once you close the repair work order.

- c.** The asset history in Installed Base shows all the asset changes that occurred as part of the transformation work order.
 - Search for items based on an item description or item number. When you select Item, a list of eligible items appears. Enter any characters from an item's number or description to narrow the list.
- o Select a Work Order to open the a work order's details page.
- o Select Cancel in Actions column to cancel a repair work order.

Note: You might need to do this if the serial number received doesn't match the serial number used to create the work order before it's received.

7. In the Charges region:

- o Select Create Charges to create service charges from repair work order material and resource transactions.

Note: When creating service charges from a depot repair maintenance work order (MWO), if the MWO transaction has an asset on it, Service Logistics uses that asset to get subscription coverages and applies those coverages when the material and labor lines are created.

The following level types are supported for subscriptions:

- Asset
 - Customer Account
 - Party
 - Party Site
 - Product
- o Select Add Charges to create and edit fixed and expense charges.
- o Enter the asset work in the Add Charges page, so the proper subscription is applied when calculating charges. For labor and parts charges, the asset on the charge line comes from the source maintenance work order transaction and can't be updated in this page.
- o Select More Actions to perform pricing-related actions like changing currency or repricing.
- o Select Your Price or Amount to edit prices and amounts for charge lines.
- o Select Post Charges to post charges for a single repair order.

If an approved estimate exists, the estimate type controls the charge lines that appear for the repair order.

Note: The estimate type only controls the charge lines when posting charges for the first time. The actual charges are posted if charges are posted more than once.

For bill-only sales orders, Service Logistics populates the sale order line's fulfillment organization from the organization on the debrief line, and the item definition organization on the sales order line defaults from the Order Management REST.

- 8.** Select Your Price and Amount 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, and 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, select Post Charges and Close to post all the charges associated with one RMA line number.

Start a Part Exchange for a Part that can't be Repaired

When a part or product can't be repaired, you can create a part exchange shipment to send the customer a replacement.

- 1. In the Assets table, select Exchange for the asset that couldn't be repaired. This opens the Exchange drawer.
- 2. Specify the replacement item and other shipping details.

Search for items based on an item description or item number. When you select Item, a list of eligible items appears. Enter any number of characters from an item's number or description to narrow the list.

- 3. Select Exchange to perform an auto parts search to find the replacement part for shipment to the customer. A shipment part requirement and sales order line are created, and the execution of the shipment begins.

When the new part or product is shipped, its asset inherits some attributes from the part that couldn't be repaired, including the parent asset and the subscription coverage.

You can also manually source the replacement part.

10 Manage Reverse Logistics Dispositions

Overview of Reverse Logistics Dispositions

You can use the Reverse Logistics Disposition pages to disposition and act on returned parts.

This includes parts returned from the:

- Field: Such as parts that are unused, dead-on-arrival, recovered defectives, or tools.
- Customer: Such as parts in need of repair, exchange, or that are eligible for a warranty claim.

Specifically, you can:

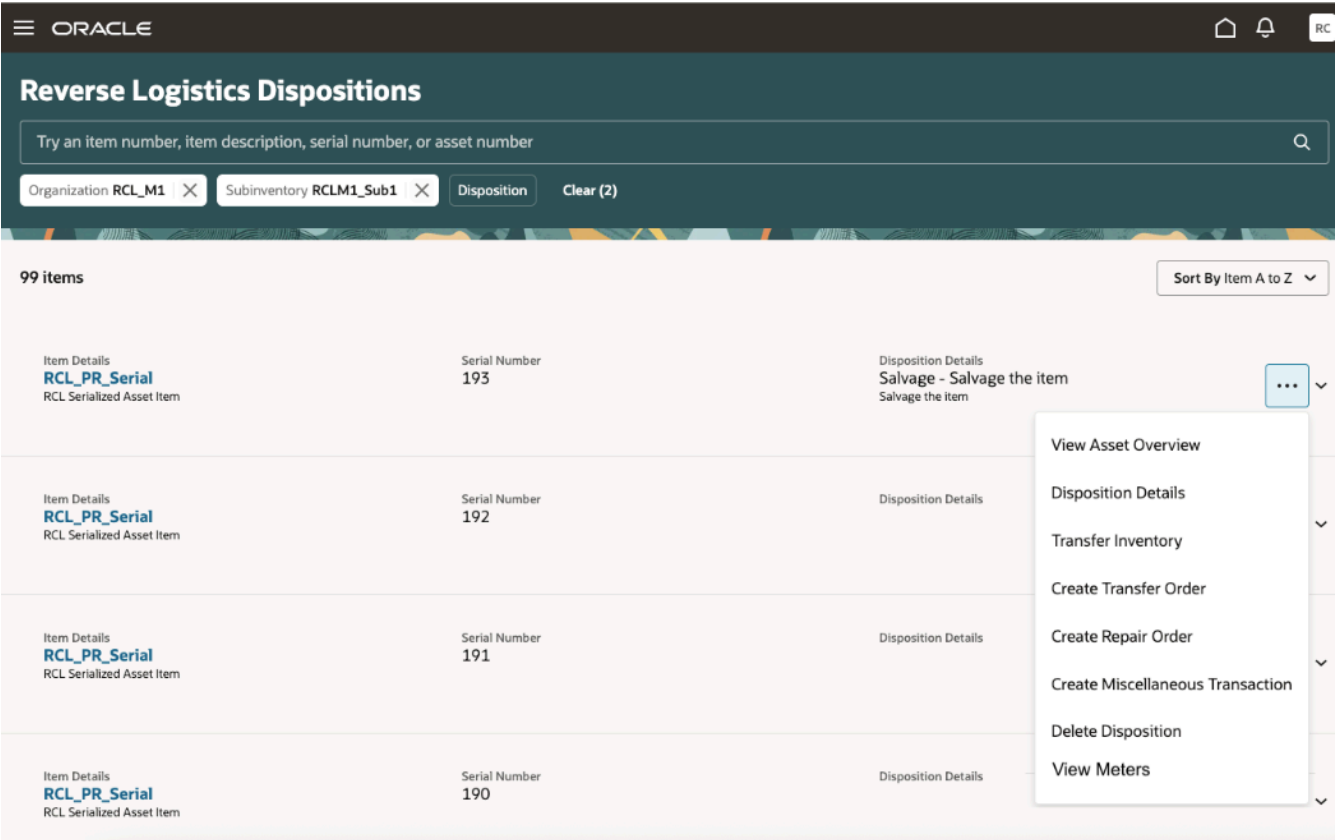
- View or search for parts in return stocking locations.
- Enter disposition decisions.
- View asset overviews.
- Perform disposition actions (inventory transactions/create repair work orders).

To access the Reverse Logistics Dispositions page, click the **Reverse Logistics** link in the drawer on the right side of the Service Logistics landing page.

Search for Reverse Logistics Dispositions

You can use the Reverse Logistics Dispositions search page to find parts to disposition.

Reverse Logistics Dispositions Search Page



The Reverse Logistics Dispositions page lists inventory items from all stocking locations for the selected organization and subinventory.

The Reverse Logistics Disposition page includes the:

- Search bar
- Filter Chips suggestion bar
- Magnifying Glass icon
- Reverse Logistics Disposition results table

These are described in the following table:

Reverse Logistics Dispositions Search

Field Name	Description
Search bar	The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include: • Organization (LOV) • Subinventory (LOV) • Disposition Code (LOV) You can also enter free text, which will search the following estimates attributes:

Field Name	Description
	• Item Number • Item Description • Serial Number • Asset Number Because the application supports autocomplete and fuzzy logic, you can partially type your search terms.
Filter Chips suggestions bar	The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include: • Organization • Subinventory • Disposition • Recommended Disposition Note: Search by the Recommended Disposition filter chip to review and take the disposition action for each line item in the Disposition Details column. When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the results table. You can search for a value directly by entering it the input field, Try an item number, item description, serial number, or asset number. For example, enter free text, which searches the following reverse logistics dispositions attributes: • Organization • Subinventory • Item • Item Description • Serial Number • Asset Number • Dispositions Code • Recommended Disposition
Magnifying Glass icon	You can use the Magnifying Glass icon to search for the attributes selected in the search bar.
Reverse Logistics Disposition results table	The Reverse Logistics Disposition results table lists the items based on your search criteria and filters. From the search results, you can take the following actions for each item: • View Asset Overview: Opens the Maintenance Asset Overview page. • Disposition Details: Opens the New Disposition Details page. • Transfer Inventory: Opens a side drawer to perform inventory transactions. • Create Transfer Order: Opens a side drawer to create transfer orders. • Create Repair Order: Opens a side drawer to create a repair order and allows you to capture a work order description.

Field Name	Description
	• Create Miscellaneous Transaction: Opens a side drawer to create transactions. • Delete Disposition: Deletes a disposition record for a returned item before any inventory or repair order transactions are performed. • View Meters: Opens a side drawer that allows you to view a meter and review its full reading and usage history and capture meter readings. The disposition record for an item will be closed and removed from the Search page once any inventory transaction is performed for that item, like when you transfer inventory or create a miscellaneous transaction. However, the record remains open if a maintenance work order is created, because multiple work orders can be created for the same item. An item will also be cleared from the Reverse Logistics Dispositions page when it's moved out of a valid stocking location.

Manage Disposition Details

You can use the Dispositions Details page to perform several disposition transactions.

You can:

- Create a disposition.
- Add an attachment.
- View an asset overview.
- Review an item status.
- Delete a disposition.
- Perform other transactions:
 - Transfer inventory.
 - Create a transfer order.
 - Create a repair order.
 - Create a miscellaneous transaction.
 - View meters and capture meter readings.

On the Dispositions tab, you'll see the item revision in the header.

1. To create a disposition:
 - a. Select **Edit**.
 - b. In the Disposition Code LOV, Select a shipping method, such as Scrap.
 - c. Select **Update**.
2. To add an attachment:
 - a. Select the **Add notes and attachments** icon.
 - b. In the **Who can see this?** LOV, select a shipping method.
 - c. In the **Comments** field, add a note description.
 - d. In the **Attachments** field, select or drop files.
 - e. **Save**.

Note: When viewing attachments, you can filter them by audience and date range.

3. To view an asset-related overview in the Maintenance Cloud, select the **View Asset Overview** button.

Note: For non-asset items, the View Asset Overview link is disabled.

4. To review the item status:
 - a. Select the **Item Status** tab to review the item status.

You can view:

- Item quantity status across multiple organizations and subinventories.
- Item quantities by their specific revisions, not just at the subinventory level.
- Track each revision's condition and quantity.

- b. Review the overall counts by stocking location for the:

- On-Hand Total
- Usable Total
- Defective Total

For each selected item and revision, the On-Hand Quantity, Usable Quantity, and Defective Quantity columns list quantities by stocking location.

5. To delete the disposition, select the **Delete Disposition** action from the action menu.

Note: If a repair order exists for the item, you can't delete it.

6. You can also take these actions, which are described in separate topics:
 - o Select the **Transfer Inventory** button to transfer inventory.
 - o Select the **Create Transfer Order** action to create transfer orders.
 - o Select the **Create Repair Order** action to create repair orders.
 - o Select the **Create Miscellaneous Transaction** action to create transactions.
 - o Select the **View Meters** action to view a meter and review its full reading and usage history and capture meter readings.

Related Topics

- [Transfer Inventory](#)
- [Create Transfer Orders](#)
- [Create Repair Orders](#)
- [Create Miscellaneous Transactions](#)
- [Capture Meter Readings](#)

Transfer Inventory

Use the Transfer Inventory action to transfer items marked for disposition from the central depot to a parts recovery location.

To transfer inventory:

1. From the Reverse Logistics Dispositions search page or the Dispositions Details page, select **Transfer Inventory** to open the Transfer Inventory drawer.

2. Enter transfer details in the Transfer Inventory drawer. You'll enter an destination organization, type, destination subinventory, and if available, a locator.

Transfer Inventory Drawer

Fields	Attribute Descriptions
Item	Defaults from row selected.
Disposition Code	Defaults from row selected.
Disposition Description	Defaults from row selected.
Asset Number	Defaults from row selected.
UOM	Primary UOM of the item.
Quantity	The number of items to be transferred.
Revision	Defaults from row selected.
Description	The item description.
Serial Number	Defaults from row selected.
Stocking Location	Defaults from row selected.
Destination Organization	Destination Inventory Org must be set up in Manage Stocking Locations page for at least one of its Subinventories.
Type	Includes valid values from the Set up Manage Inventory Transaction Sources and Types page.
Destination Subinventory	Includes the subinventory associated with the organization.
Locator	Includes existing locator codes for the selected inventory organization and subinventory.
Address	Uses the subinventory internal location address or the inventory organization internal location address.
Shipment Number	The auto-generated shipment number.

3. Click **Transfer**. After the validation, an inventory transfer transaction is created.

Create Transfer Orders

Use the Create Transfer Order action to perform transfers between organizations and subinventories.

To create a transfer order:

1. From the Reverse Logistics Dispositions search page or the Dispositions Details page, select the **Create Transfer Order** action to open the Create Transfer Order drawer.

2. Enter transfer order details in the Create Transfer Order drawer. You'll enter a destination organization, destination subinventory, requested ship date, and a shipping method.

Create Transfer Order Drawer

Fields	Attribute Descriptions
Disposition Code	Defaults from row selected.
Disposition Description	Defaults from row selected.
Serial Number	Defaults from row selected.
Asset Number	Defaults from row selected.
UOM	Primary UOM of the item.
Quantity	The number of items to be transferred.
Stocking Location	Defaults from row selected.
Destination Organization	Destination inventory organization must be set up in Manage Stocking Locations page for at least one of its Subinventories.
Destination Subinventory	Includes the subinventory associated with the organization.
Requested Ship Date	Defaults as the system date.
Shipping Method	Shipping methods must be set up for the source organization in the Manage Carriers page.

3. Click **Create Transfer Order**. After the validation, a transfer order transaction is created.

Create Repair Orders

You can create a repair order in the disposition and depot repair process.

To create a repair order:

1. From the Reverse Logistics Dispositions search page or the Dispositions Details page, select the **Create Repair** action to open the Create Repair Order drawer.

Create Repair Order Drawer

Fields	Attribute Descriptions
Item	Defaults from row selected.
Description	Defaults from row selected.
Serial Number	Defaults from row selected.

Fields	Attribute Descriptions
Disposition	Defaults from row selected.
Disposition Description	Defaults from row selected.
Type	Defaults from row selected.
Asset	Defaults from row selected.
Asset Description	Defaults from row selected.
Quantity	The number of items.
Type	Predefined values include: ○ Corrective ○ Preventive
Subtype	Define subtypes in the Maintenance lookup. Predefined values include: ○ Condition based ○ Emergency ○ Under warranty ○ Reactive ○ Safety ○ Planned
Priority	Enter free text for priority.
Status	A customer-defined work order status that's tied to one of the following work order system statuses: ○ Unreleased ○ On Hold
Planned Start Date	Select a date and time.
Planned Completion Date	Select a date and time.
Work Definition	Work definitions (names) that are associated with the selected organization.
Work Order Description	Enter a descriptive purpose, scope, or specific instructions for the repair.

2. In the Type LOV, select a repair order type.
3. In the Subtype LOV, select a repair order subtype.
4. In the Organization LOV, select a organization.
5. In the Status LOV, select a status.
6. In the Planned Start Date calendar, select a date.
7. In the Planned Completion Date calendar, select a date.
8. In the Work Definition LOV, select a work definition.
9. In the Work Order Description field, enter a description.

10. Click Create.

Create Miscellaneous Transactions

You can enter miscellaneous transactions and cost-related information for items processed through reverse logistics. Specifically, you can create miscellaneous transactions for inventory issues and account issues.

1. From the Reverse Logistics Dispositions search page or the Dispositions Details page, select the **Create Miscellaneous Transaction** action to open the Create Miscellaneous Transaction drawer.
2. Enter your transaction details.

Miscellaneous Transaction Drawer

Fields	Attribute Descriptions
Disposition Code	Defaults from row selected.
Disposition Description	Defaults from row selected.
Serial Number	Defaults from row selected.
Asset Number	Defaults from row selected.
Lot	Lot number for the selected inventory line.
Transaction Type	Shows the types that include the Issue from Stores transaction action for the issue-out transactions.
Account/Account Alias	Field label changes based on if the selected transaction type has an account or an account alias ○ Transaction type without an alias shows the account. ○ Transaction type with an alias shows the alias name.
Account Number	Defaults from row selected.
UOM	Primary UOM of the item.
Quantity	The number of items.
Source	Text for source details.
Use Current Cost	Defaults based on the Manage Inventory Organization Parameters setup.
Requestor	Requestor for the transaction.
Cost Component	Appears if Use Current Cost is set to No.
Unit Cost	Shows if Use Current Cost is set to No. The field is enable after you select the cost component.

Fields	Attribute Descriptions
Cost Component (second)	Same a previous Cost Component.
Unit Cost	Same as previous Unit Cost.

3. In the Type LOV, select a transaction type.
4. In the Account Number LOV, select an account number.
5. In the Current Cost LOV, select Yes or No.
 - o Yes: Cost component is disabled.
 - o No: Cost component is enabled.
6. If you select No from the Current Cost LOV:
 - a. In the Cost Component LOV, select a cost component, such as Item price.
 - b. In the Unit Cost LOV, enter a cost.
 - c. In the second Cost Component LOV, select a cost component.
 - d. In the second Unit Cost LOV, enter a cost.
 - e. Click **Create**.

Capture Meter Readings

You can view asset meters and capture meter readings from the Reverse Logistics Dispositions page.

To view and capture meter readings:

1. From the Reverse Logistics Dispositions search page or the Dispositions Details page, select the **View Meters** action from the actions menu.

This opens a drawer with two tabs, Meters and View Meter History.

2. On the Meters tab, you'll see the following:
 - o Meter Name
 - o Displayed Reading
 - o Life-to-Date Reading
 - o Last Reading Date
3. To create a new meter reading, select the **Edit** action from the action menu. Here you can create a new meter reading.

The following information defaults for your meter reading based on the setups:

- o Meter Name
 - o Meter Code
 - o Meter Type
 - o Reading Type
 - o Direction (ascending or descending)
4. Enter the following for you new reading:

- a. In the **Reading Date-Time** calendar, select a date and time.
- b. In the **New Reading** field, enter a value.

Note: You can also choose to reset the reading and add a comment.

- c. **Save.**

5. To see all of the readings for your meter, including your most recent entry, select the **View Meter History** tab from the tab. Here you'll also see the net change between readings here.

Capture Quality Inspections for Returns

You can capture quality events to record inspection results for returns for reverse logistics dispositions.

Use a predefined inspection plan that applies to the asset or by performing an inspection without a predefined plan. You can also review inspection history to see details of previously recorded quality events.

Note: Inspection plans should be defined in Quality Management using the Create New Inspection Plans page.

- The inspection type should be **Asset** for the plans to be listed in Work Order Charges page.
- The plans shouldn't have any applicability conditions defined.

Capture Inspection Results from the Work Orders UI

Use this procedure to capture inspection results for defective asset parts returned by customers.

1. Navigate to the Reverse Logistics Dispositions page.
2. Locate the customer return and the applicable disposition line for the asset part that you want to inspect.
3. From the available actions, select **Inspection Plans**.
4. Review the list of inspection plans applicable to the asset.
5. Select the inspection plan that you want to use.

Alternatively, select the option to perform an inspection when you want to capture inspection results without using a predefined inspection plan.

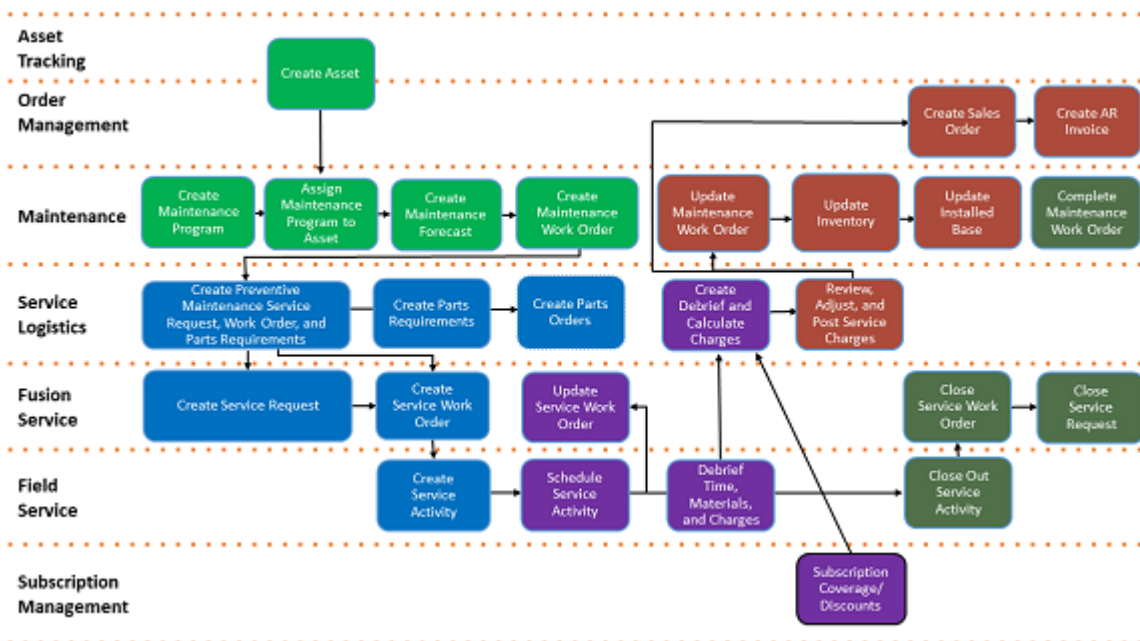
6. On the Enter Inspection Results page, enter the inspection information.
7. Review the inspection information and save the results. If needed, you can view the inspection history for the applicable plan to review details of previously captured quality events.

11 Manage Preventive Maintenance Work Orders

Overview of Preventive Maintenance Tasks for Customer Assets

You can use Maintenance, Service Logistics, Fusion Service, and Field Service 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 starts 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 pages, 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
 - Oracle Field Service
 - Oracle Fusion Field Service
- Work Order Type: Used to create field service work orders.
- Work Order Status: Used to create field service work orders.
 - Submitted
 - Scheduled
 - Started

Tasks

Task	Application	Who or what starts this task?	Description
Create Preventive Maintenance Service Request, Work Order, and Parts Requirements	Service Logistics	Usually created by field service planning or dispatchers. Note: See 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.

Task	Application	Who or what starts this task?	Description
Create Field Service Activity	Fusion Service	OIC integration automatically creates the field service activity.	Create a service activity to start 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's each service request attribute populated?
Title	1. Work definition name comes from MWO. 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.
Primary Contact Party ID	1. Contact from asset 2. Asset customer's preferred contact
Problem Description	1. MWO work definition description 2. MWO description
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 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	1. MWO asset contact 2. MWO asset customer's preferred contact	1. MWO asset contact 2. MWO asset customer's preferred contact
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	• ESS job a. MWO asset location (HZ_Location) time zone b. FND Time Zone profile option • OIC a. MWO asset location (HZ_Location) time zone b. Coded value in the OIC	• ESS job a. MWO asset location (HZ_Location) time zone b. FND Time Zone profile option • OIC a. MWO asset location (HZ_Location) time zone b. Coded value in the OIC

Work Order Attributes	How is the generic work order created?	How is the Field Service work order created?
Work Order Area (not a required field)	Null	ESS job calls the Fusion Service REST API (svcWOarea) to get the work area: Inputs: - Postal Code (from MWO asset location) - Time Zone Code (from MWO asset location) - Country Code (from MWO asset location) - Work Order Type (from user input when submitting the ESS job) Outputs: WO Area (string) OIC calls the Fusion Service REST API (svcWOarea) to get the Work Area. Inputs: (configurable by customer) - Postal Code (from MWO asset location) - Time Zone Code (from MWO asset location) - Country Code (from MWO asset location) - Work Order Type (OIC input) Outputs: WO Area (string) Note: 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.
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 OFSC pages or in the Service Logistics Receiving pages.

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 starts 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 starts 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	• Update the maintenance work order (MWO). This is the original MWO that started the creation of the service request and the work order in Fusion Service. • Subscription coverage is applied when calculating charges for the material and resources transactions captured on the repair maintenance work order. The covered level types supported for subscriptions are: ○ Asset ○ Customer Account ○ Party ○ Party Site ○ Item • Create inventory transactions on the maintenance work order. • Use the maintenance work order inventory transactions to update the installed base. • Create a bill-only sales order. • Create an invoice (Order Management Distributed Order Orchestration).

Close Service Requests and Work Orders

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

Task	Application	Who or what starts 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.

12 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, and in technician trunk stocking locations.

For each item, the page displays the on-hand, available, reserved quantities, and 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 **In-transit 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 in-transit transaction, enter a shipment number in the **Shipment** field or click 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 start 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.
- In-transit 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 can only 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 another 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 go to the Manage Field Parts Inventory page to check the on-hand quantity of the parts received.

13 Manage Field Parts Inventory (Redwood)

Overview of Field Parts Inventory in Redwood

You can use the Field Parts Inventory pages to view your inventory in different stocking locations.

Specifically, you can:

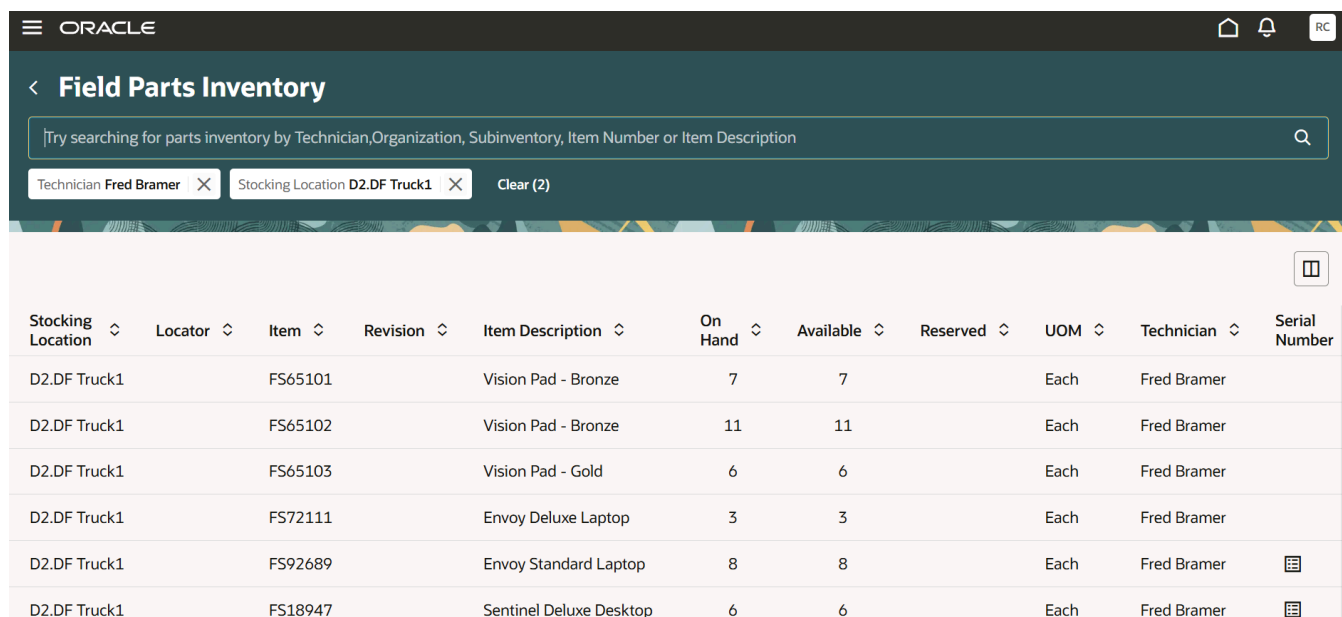
- Search for available, on-hand quantities of inventory associated with different types of stocking locations, such as manned, unmanned, site-dedicated, and technician trunk stock locations.
- View the serial numbers for serial-controlled items.
- For the items with reservations, check and manage reservation details using the **Reservation** link.

To access the Field Parts Inventory page, click the **Field Parts Inventory** link in the drawer on the right side of the Service Logistics landing page.

Search for Field Parts Inventory

You can use the Field Parts Inventory page to perform inventory searches in different stocking locations.

Field Parts Inventory Search Page



Stocking Location	Locator	Item	Revision	Item Description	On Hand	Available	Reserved	UOM	Technician	Serial Number
D2.DF Truck1		FS65101		Vision Pad - Bronze	7	7		Each	Fred Bramer	
D2.DF Truck1		FS65102		Vision Pad - Bronze	11	11		Each	Fred Bramer	
D2.DF Truck1		FS65103		Vision Pad - Gold	6	6		Each	Fred Bramer	
D2.DF Truck1		FS72111		Envoy Deluxe Laptop	3	3		Each	Fred Bramer	
D2.DF Truck1		FS92689		Envoy Standard Laptop	8	8		Each	Fred Bramer	
D2.DF Truck1		FS18947		Sentinel Deluxe Desktop	6	6		Each	Fred Bramer	

The Field Parts Inventory page includes:

- Search bar
- Field Parts Inventory results table

These are described in the following table:

Field Parts Inventory

Field Name	Description
Search bar	You can enter search criteria for the following: • Technician • Organization • Subinventory • Item Name • Item Description
Facet search	Select a facet to filter your search. Note: This page has different facets for the administrator and technician users. • For an administrator: Stocking Location and Technician are the two facets. • For a technician: Stocking Location is the only facet.
Field Parts Inventory results table	The Field Parts Inventory results table lists the field parts inventory based on your search criteria. This includes: • Organization • Subinventory • Locator • Item • Revision • Item Description • On Hand (quantity) • Available (quantity) • Technician • UOM • Serial Number You can also sort your results by selecting the arrows next to the column headers. When you first open the page, the field parts inventory are sorted by the search parameters. Select the Serial Number icon to view the serial numbers associated with an item. For the items that have reservations, you can check and manage the reservation details by selecting the Reservation link. You can view the document type, document number, and quantity reserved for the associated item and you can also delete the reservation by selecting the Delete icon.

Field Name	Description
	You can perform transfer and return transactions for the items, by selecting the Transfer and Return icons in the Actions column to open: • Return part drawer and perform returns. Enter details and select Return. • Transfer part drawer and perform transfer transactions for the selected item. Enter details and select Transfer.

14 Receive Parts (Redwood)

Overview of Receive Parts in Redwood

You can search for parts to receive in the Receive Parts page.

Specifically, this page allows you to find, review, and receive eligible parts in one place. You can:

- Receive parts one line at a time, or;
- Select multiple lines to receive together.

The page supports serialized, non-serialized, and lot-controlled items, with helpful defaults and validations to improve accuracy. Search results show only parts that are ready to receive from eligible transfer orders and in-transit shipments that are ship confirmed and use standard receipt or direct delivery routing.

To access the **Receive Parts** search page, click the **Receive Parts** link in the drawer on the Service Logistics landing page.

Search for Parts to Receive

You can search for parts that are ready to receive from eligible transfer orders and in-transit-shipments.

Receive Parts Search Page

ORACLE

< Receive Parts

Try a transfer order, shipment, or work order

Technician

Destination OrganizationField Service Technicians

Destination Subinventory

Item

Clear (1)

599 items

Receive Selected Lines

☐	Work Order	Trans Order	Item	Description	Quantity Ordered	Shipped Quantity	Quantity Received	UOM	Serial Numbe	Source Organization	Sou Sut	Action
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00602	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00603	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00604	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00605	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00606	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00607	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00608	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00609	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00610	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00611	RCL National Wa...	Usz	
☐	0000024021	340119	RCL_PR...	RCL Serialized ...	600	600	1	Each	cha00612	RCL National Wa...	Usz	

The Receive Parts page only includes the parts that are ready to receive. It includes the:

- Search bar
- Filter Chips suggestions bar
- Magnifying Glass icon
- Receive Parts results table

Note: You must select an organization.

These are described in the following table:

Receive Parts Search

Field Name	Description
Search bar	The search bar opens with filter chips, which you can add or delete filters depending on your search needs. The selectable filter chips include: • Technician (LOV) • Destination Organization (LOV) • Destination Subinventory (LOV) • Item (LOV)

Field Name	Description
	You can search for a value directly by entering it the input field, Try a transfer order, shipment, or work order. You don't need to enter complete search terms. All filters support autocomplete, and the search field uses fuzzy logic to help you find relevant results.
Field Chips suggestion bar	The filter chips appear in the Search bar and provide suggestions for filtering your results set. For example, you might see a filter suggestion for the destination organization. You can select this filter chip to filter your results. When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the Receive Parts results table.
Magnifying Glass icon	You can use the Magnifying Glass icon to filter your results based on predefined filter chips and their associated values.
Receive Parts results table	The Receive Parts results table lists the transfer orders and work orders 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 lines are sorted by the work order number.

Receive Parts

Receive serialized, non-serialized, and lot-controlled items.

You can receive one or multiple part lines from the Receive Parts page.

- Use line-level receiving to review or update details for a single transaction.
- Use bulk receiving when multiple eligible lines can be received together with common values such as subinventory or locator.

After receiving is complete, the search results refresh to show current statuses and remaining receivable quantities.

Receive a Part Line

1. Open the Receive Parts search list.
2. Select the row for the part line you want to receive.
3. From the Actions menu, select **Receive**. This opens the Receive parts drawer.
4. In the Receive parts drawer, review the fields shown for the item type.
 - a. For a non-serialized item, update the receiving quantity.
 - b. For a lot-controlled item, enter the quantity or review the lot details.
 - c. For a serialized item, review the serial number. The quantity is fixed at one.
5. Review any defaulted values, such as subinventory and quantity.
6. If the item is locator-controlled, enter the required locator information.
7. Select **Submit**.
8. Verify that the drawer closes and the search results refresh.

Receive Multiple Part Lines

1. Open the Receive Parts search list.
2. Select the rows for the part lines that you want to receive.
3. From the Actions menu, select **Receive Selected Lines**.
4. In the Receive parts drawer, review the number of selected lines.
5. Enter common values, such as subinventory and locator, where applicable.
6. Review the selected lines before submission.
7. Select **Submit**.
8. Confirm the result message:
 - After the selected line or lines are successfully received, a **Selected lines received** confirmation message appears.
 - When receiving multiple lines, if one or more lines can't be received due to validation errors, a **Selected lines partially received** message appears.
9. Verify that the drawer closes and the search results refresh.

Receive Purchase Orders

You can receive eligible purchase order lines and review the lines available for receiving.

The Purchase Orders tab on the Receive Parts page supports uncontrolled, serial-controlled, lot-controlled, and lot-and-serial-controlled items. This lets you find the right purchase order lines through specific search, filters, and result details.

Some things you'll need to know:

For serial-controlled items, the supported serial control types are:

- Predefined serial number
- Dynamic entry at inventory receipt

Supported receipt routing types are:

- Standard Receipt
- Direct Delivery

Only purchase order lines with an inventory destination type are available for receiving.

Receive Purchase Orders

To receive purchase orders:

1. Navigate to the Receive Parts page.
2. Select the **Purchase Orders** tab.
3. Search for purchase order lines by entering a purchase order, item, or supplier.
4. Apply filters as needed to refine the search results.
5. Review the purchase order lines returned in the search results.

The search results display the purchase order lines that are available for receiving and the actions you can use to continue the receiving process.

6. Receive the purchase order line based on the item control type:
 - **Uncontrolled item:** Select the row-level receive action to open the Receive Parts drawer. Enter the receipt quantity for the line.

Note: You can also select multiple eligible uncontrolled lines and receive them in bulk.
 - **Serial-controlled item:** Select the row-level receive action to open the Receive Purchase Order Line drawer. The receipt quantity is fixed at one. Depending on the item setup, select a serial number from the list or enter the serial number manually. Receive each line one at a time.
 - **Lot-controlled item:** Select the row-level receive action to open the Receive Purchase Order Line drawer. Enter or select the lot number, and confirm the receipt quantity.
 - **Lot-and-serial-controlled item:** Select the row-level receive action to open the Receive Purchase Order Line drawer. Enter the required lot and serial details. Receive one quantity at a time.
7. Review the receipt details and complete the receipt.

15 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, and work orders with billing errors that need attention. You can also generate revenue reports for charges posted against service work orders.

Here are some key business questions that these reports address:

Service Parts Profitability reports:

- What's 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 in 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'll 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 go to the subject areas for Service Logistics:

1. In the Navigator, click **Reports and Analytics**, and then click **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'll see the Select Subject Area dialog box.
4. As you scroll down, you'll 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 in that subject area.
6. You can now proceed to create your analysis.

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