

Oracle Fusion Cloud SCM



Using Order Management

26C

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Get Help

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

Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

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Thanks for helping us improve our user assistance!

1 Hello

What's New in Using Order Management

Get a summary about content that's new or significantly revised in each update of Using Order Management.

To get details about:

- New features in each update, go to *Cloud Applications Readiness*, then click Order Management What's New.
- Known issues for each update, see *Oracle Supply Chain Management Cloud Functional Known Issues and Maintenance Packs (Doc ID 1563075.1)*.

This guide mentions *redesigned pages*. You might or might not use them, depending on how your Order Administrator sets up Oracle Order Management. For background, see *Should I Use Redesigned or Classic Pages?*.

Update 26A

Topic	Description
<i>Search Sales Orders and Order Lines</i>	Revised. Most attributes that you can search display the top 10 values according to how frequently they occur on your sales orders or order lines. If that list doesn't contain the values you seek, then you can enter a few characters.

Update 25D

Topic	Description
<i>Search Sales Orders and Order Lines</i>	Revised. Order Management's redesigned pages use special characters as delimiters. You can use them to create an OR or an AND condition in your search.

Update 25A

Topic	Description
<i>Return Sales Orders</i>	Revised. See the new Returns and Splits subtopic.
<i>Manage Other Behavior on Sales Orders</i>	Revised. See the Edit Currency Details subtopic.
<i>Import Returns into Order Management</i>	Revised. Use Oracle Inventory Management or Oracle Receiving to receive a return, not Oracle Receivables.

Update 24D

Topic	Description
<i>Manage Other Behavior on Sales Orders</i>	Revised. Updates about type, rate, and date when you edit currency details.
<i>Approve Sales Orders</i>	Revised. You can send a notification only one time. You can't resend a notification for approval.

Update 24C

Topic	Description
<i>Manage Other Behavior on Sales Orders</i>	Revised. You can't edit currency details after you submit your sales order.

Update 24B

Topic	Description
<i>Return Sales Orders</i>	Revised. See how to return a bill only item when the Return action is disabled.
<i>Fix Errors in Sales Orders</i>	Revised. See what to do when there's a problem on the server or the network goes down.

Update 24A

Topic	Description
<i>Cancel Sales Orders</i>	Revised. You can't update or cancel an order line that's in the Awaiting Billing status.
<i>Return Sales Orders</i>	Revised. Return a bill only item.
<i>Revise Sales Orders That You Already Submitted</i>	Revised. If Order Management closed or canceled all of the order's order lines, then you can't revise a value on the order header.

Update 23D

Topic	Description
<i>Recover Sales Orders That Are Locked or Not Started</i>	Revised. See the new Unlock Right Away and Recover Orders or Lines That Are Not Started subtopics.
<i>Use Holds to Temporarily Stop Processing</i>	Revised. You can't use a fulfillment view to release a hold from an order line or a sales order. Use the Order page instead.
<i>Cancel Sales Orders</i>	Revised. See the new Cancel Sales Order When It Has Lines That Aren't and Are Fulfilled subtopic.
<i>Fix Errors in All Sales Orders</i>	Revised. You can use the Recover Errors scheduled process only to recover from unplanned errors. You must not use it as part of your regular business flow.

Update 23C

Topic	Description
<i>Return Sales Orders</i>	Revised. See the revised Conditions That Determine Whether You Can Return an Item subtopic.
<i>Guidelines for Managing Sales Orders That Have Inventory Transactions</i>	Revised. The Identify Lots subtopic has new details about projects.
<i>Cancel Order Lines That Remain in Same Status</i>	Revised. See the new Other Guidelines subtopic.

Update 23B

Topic	Description
<i>Fix Errors in All Sales Orders</i>	Revised. For most situations, don't run the Recover Errors scheduled process more than one time each day.

Update 23A

Topic	Description
<i>Fix Errors in All Sales Orders</i>	Revised. Clarified the sequence in How Recover Errors Works.
<i>Revise Sales Orders That You Already Submitted</i>	Revised. Has a new Update Attributes on Split Order Lines for Partial Shipments subtopic.

Update 22D

Topic	Description
<i>Search Sales Orders and Order Lines</i>	New. If you specify more than one attribute when you search, then Order Management uses an AND condition.
<i>Fix Problems and Improve Performance</i>	Revised. Improve performance when you search.
<i>Cancel Sales Orders</i>	Revised. You can't delete a sales order that's in Processing status. Cancel it instead.
<i>Add Configured Items to Order Lines</i>	Revised. You can apply tax value to only the root parent, only the child components, or to the root parent and the children.
<i>Approve Sales Orders</i>	Revised. You can use the BPM Worklist to examine details about the approval.
<i>Copy Sales Orders</i>	Revised. Get new details about what you can copy.

Update 22C

Topic	Description
<i>Add Sales Agreements to Sales Orders</i>	Revised. If an order line has an agreement, then you can revise the line only if the Contract Start Date happens on or before the current date and if the Contract End Date happens on or after the current date.

Update 22B

Topic	Description
<i>Ship Order Lines in Shipment Sets</i>	Revised. See the new Substitute subtopic.
<i>Cancel Order Lines That Remain in Same Status</i>	Revised. If you have an order line that's stuck because of a scheduling or reservation problem, then you can force Order Management to compensate the line and see if it can fix the problem.
<i>Revise Sales Orders That You Already Submitted</i>	Revised. You can't update the value in an extensible flexfield.
<i>Monitor Order Fulfillment</i>	Revised. The Fulfillment Line page displays lots of fulfillment details, but there are some attributes that it doesn't display directly on the page. See how you can get details for some of these attributes.

Update 21D

Topic	Description
Dual Units of Measure	New section. See how you can use the dual units of measure feature in your Order Management implementation to order, price, manufacture, receive, pick, pack, and ship an item in the primary UOM but price it in the secondary UOM.
Inventory	New section. Use the Order Management work area to create a sales order that has an inventory transaction.
Fix Errors in All Sales Orders	Revised topic. Use the Scope parameter to fix errors according to where the problem happens.

Update 21A

Topic	Description
Manage Credit Cards on Sales Orders	New. Add and manage the credit card that you use on each sales order.
Return a Drop Shipment	New. Get new details about how to receive a drop shipment.
Escalate Problems You Can't Resolve	New. Escalate problems that you can't resolve to your order administrator.
Return and Replace Items During Drop Shipment	New. Learn how to return and replace a defective item in a drop shipment.
Order Management Statuses	Revised. If the Scheduled Ship Date happens in the future, then the Orders on Backorder area might use the less than one day bar to indicate that the order has been on backorder for less than a day.
Coverages and Subscriptions in Sales Orders	Revised. A coverages or subscription moves through different statuses during fulfillment just like a regular order line, but with a few differences.
Fix Errors in All Sales Orders	Revised. Get new details about the parameters you can set.

Topic	Description
Fix Problems and Improve Performance	Revised. Export order line data to Microsoft Excel.
Other Behavior on Sales Orders	Revised. Learn how to use the Type attribute on the Edit Currency Details dialog.
Approve Sales Orders	Revised. Change your set up if you can't see your notifications.
Revise Sales Orders You Already Submitted	Revised. You can reduce the quantity on an order line that you already submitted but that Order Management hasn't already shipped.
Schedule Fulfillment Lines Manually	Revised. If you need to schedule or unschedule a order line that's on hold, then you might need to release the hold first.

Update 20D

Topic	Description
Ship Order Lines in Shipment Sets	Revised. Get details about new guidelines that describe how to use a shipment set with a coverage item.
Order Management Statuses	Revised. If the Scheduled Ship Date happens in the future, then the Orders on Backorder area might use the less than one day bar to indicate that the order has been on backorder for less than a day.
Add Coverage to Sales Orders	Revised. Get new details about Duration and Period.
Revise Sales Orders You Already Submitted	Revised. Find out what happens if you increase the quantity on an order line when you revise a sales order.

Update 20C

Topic	Description
Manage Channel Programs on Sales Orders	New. Order Management automatically applies supplier programs to each order line that's eligible to participate in the program, depending on how your order administrator sets up Order Management.
Revise Sales Orders You Already Submitted	Revised: <ul style="list-style-type: none"> If you revise a sales order then cancel the revision but don't save or submit your changes, then Order Management still creates a draft of your revision. If Order Management splits an order line, and if Order Management ships part of the split line, then you can't revise the quantity that hasn't shipped. Instead, create a revision, cancel the line that has the unshipped quantity, then create a new return line for the unshipped quantity.
Return Sales Orders	Revised:

Topic	Description
	<ul style="list-style-type: none"> The order line that contains the item you want to return must reach the Shipped status. You can only return the quantity that you haven't already successfully returned and aren't in the process of returning. You can't return an order line that's part of a shipment set. Learn how to resolve a problem when the Bill-To Contact isn't active.
Cancel Order Lines	Revised. You can't update or cancel an order line that's in the Awaiting Billing status. Instead, make sure the line is fulfilled or closed, then create a return order.
Other Behavior on Sales Orders	Revised. If your override results in an attribute value on the order line that's different from the value for the same attribute on the order header or tab, and if you then change the attribute value on the order header or tab, then Order Management doesn't copy your change to the order line.
Schedule Fulfillment Lines Manually	Revised. If an application downstream of Order Management cancels the purchase order or purchase requisition for a drop shipment, then Order Management updates your sales order and sets the status of the order line to Manual Scheduling Required.

Update 20B

Topic	Description
Ship Order Lines in Shipment Sets	Revised. Includes a new guidelines section.
Fix Errors in All Sales Orders	Revised. Learn how Recover Errors works.
Fix Problems and Improve Performance	Revised. Includes a new example.

Overview of Managing Sales Orders

Use the Order Management work area to create a new sales order and to get details about sales orders and the fulfillment systems that your organization uses to fulfill them.

Use the Order Management Page to Get Started

Use the Order Management page in the Order Management work area as the starting point to create and manage your sales orders:

The screenshot displays the Oracle Order Management interface. At the top, there is a navigation bar with the Oracle logo and a menu icon. Below this, the main header reads "Order Management All Business Units". The interface is divided into two summary cards: "My Orders" showing 68 orders for the last 7 days, and "Orders in Error" showing 49 orders. A search bar is located to the right of these cards. Below the search bar, there are filter buttons for "Customer", "Order Status", and "Total". A callout labeled "Filter" points to the "Total" button. The main content area shows a table of 68 items. A callout labeled "Drill down" points to the first order ID, 521951. The table has columns for Order ID, Customer, Status, Total, and Order Date. The bottom of the interface features a navigation bar with icons and labels for "Order Management", "Sales Orders", "Sales Order Lines", and "Action Status".

Order	Customer	Status	Total	Order
521951	FOM-Customer-001	Processing	\$11 619.33	11/18
521931	Computer Service and Rentals	Processing	\$134.00	11/18
521861	Computer Service and Rentals	Processing	\$3 317.16	11/18
521795	FOM-Customer-001	Processing	\$144.72	11/18

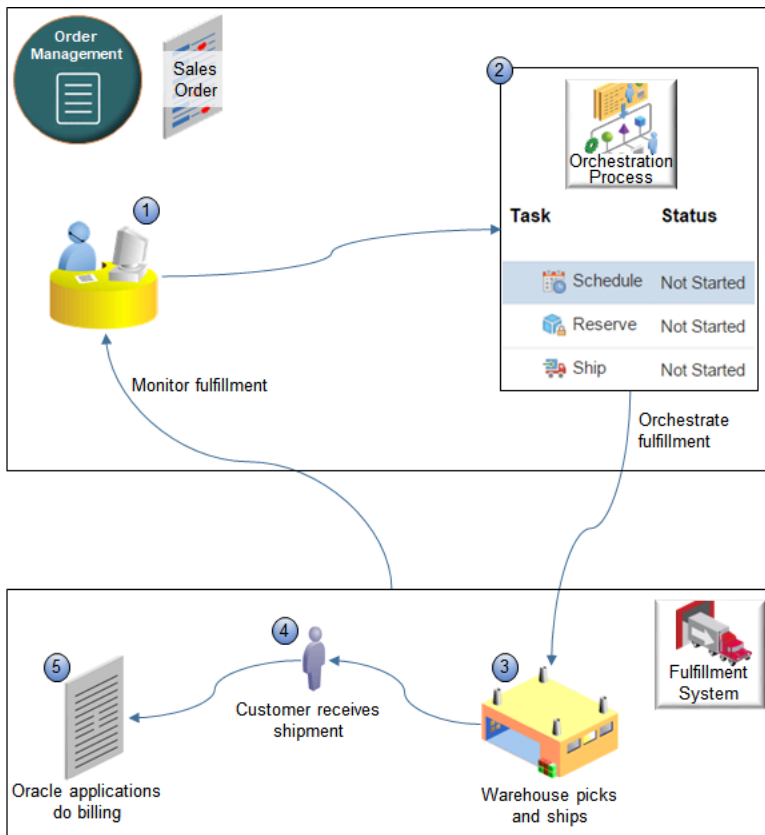
You can:

- Create a new sales order.
- Monitor order status and fulfillment line exceptions.
- View sales orders and the orchestration processes that fulfill them.
- Use visual alerts and statuses to identify tasks that are in jeopardy.
- Check an item's availability, including options and their costs and delivery dates.
- Take corrective action, such as substitute an item or split an order line so you can supply an item from more than one warehouse.
- Manually schedule an order line.
- Manage holds.
- Manage messages.
- Recover from errors.

Fulfill Sales Orders

Your order administrator sets up Order Management and other Oracle applications, such as Oracle Inventory Management, to optimize order fulfillment for your organization.

Here's a generic order fulfillment process:



Note

1. You sign into the Order Management work area, then create a new sales order on the New Sales Order page. You select the customer on the order header, add order lines, then submit.
2. An orchestration process fulfills the order lines.

The orchestration process runs tasks that do fulfillment, such as schedule, reserve inventory, and ship. You can use it to monitor fulfillment status.

To schedule fulfillment, the orchestration process uses the set up that your order administrator does for the supplier, such as how to determine the warehouse that will supply the item.

For details, see [Monitor Order Fulfillment](#).

3. Order Management sends the sales order to Oracle Inventory Management, which reserves inventory, picks the item from warehouse shelves, then ships it to your customer.

Inventory Management communicates the shipment's status to Order Management during order fulfillment, and Order Management displays these updated statuses in the Order Management work area so you can monitor fulfillment.

4. Your customer confirms that they received the item.

- Order Management uses the billing that your order administrator set up, such as the payment terms for the customer, to bill the customer for the sales order, then billing collects payment. You can also set billing details on the order header.

Order Management continuously updates the order status and displays it throughout the Order Management work area during fulfillment.

Some organizations might also import source orders from an order capture system into Order Management. Ask your order administrator for details about how order fulfillment works at your organization.

Example of a Sales Order

Here's an example of a sales order that you can create:

New Sales Order

Draft

Business Unit **Vision Operations** Customer **Computer Service and Rentals** Order Total **0.00 USD**

Business Unit
Vision Operations

Customer
Computer Service and Rentals

Bill-to Account Number
1006

[Additional order details](#)

Try line number, item details, line status, or warehouse

0 items Copy Line Update Lines Expected Availability More Actions

☐	Line	Alerts	Item	Item Description	Quantity	UOM	Charge Name	Unit Selli...	Amount	Line Status
	1		AS54888	Standard Desktop	1	I	Sale Price	2 505.00	2 505.00	Created

Note

- Use the order header to add details about the customer. You set the Customer attribute to a value, such as Computer Service and Rentals, then Order Management fills in values for other attributes on the header.
- Use the order line to search for the item that you need to add.

In this example, you already searched for and added the AS54888 Standard Desktop. You then searched for the CN62101 Printer, and will click Apply.

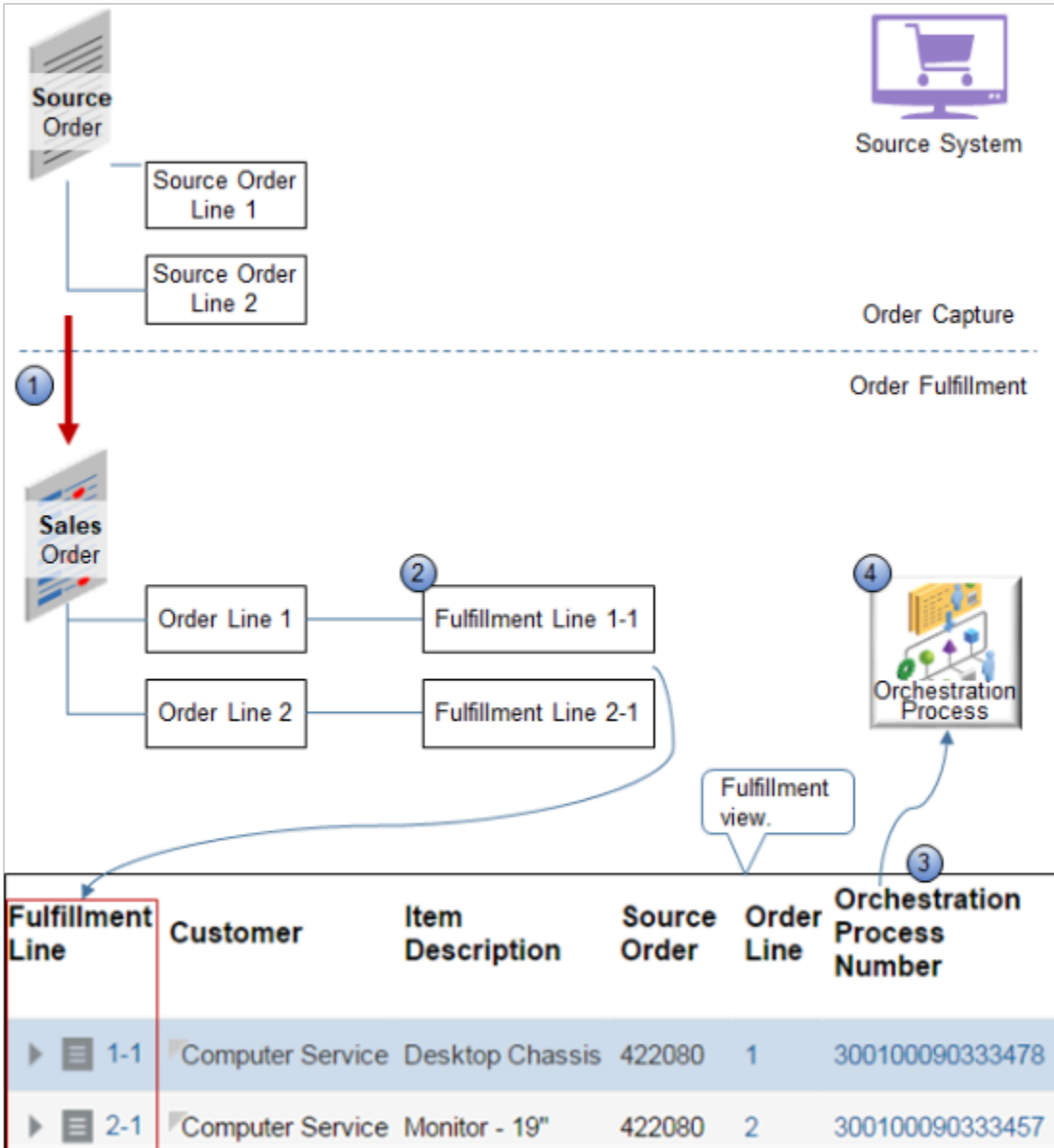
- Use tabs in the order line section to set other details:
 - Click the truck to set shipping and supply details, such as the warehouse that supplies the item, and the carrier, such as United Parcel Service or the United States Postal Service.
 - Click the tag to set billing details, such as whether payment terms are Net 30 or Immediate.

Related Topics

- [How Order Management Converts Source Orders Into Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)
- [Monitor Order Fulfillment](#)
- [Create Sales Orders](#)

How Order Management Converts Source Orders Into Sales Orders

Order Management converts the source order that you create in Order Management or that it receives from a source system so it can optimize order fulfillment.



Order Management converts a source order:

1. Receives a source order that you submit in Order Management or that it gets from a source system. The source order in this example includes three order lines.
2. Separates the source order into order lines.
3. Assigns each order line to a new orchestration process that it creates to orchestrate fulfillment for the order line.

For example, it might assign order line 1-1 to orchestration process 300100090333478, and order line 1-2 to orchestration process 300100090333457.

The diagram includes part of the view that you use to monitor fulfillment. For details, see *Monitor Order Fulfillment*.

4. Starts the orchestration process that fulfills the order line. You can use a fulfillment view in Order Management's classic pages to monitor the orchestration process.

Order Management typically finishes transformation within a few seconds after you submit.

Order Management sets the completion date of the final step in the orchestration process to the requested date of the source order. The Last Fulfillment Completion Step sets the final step of the orchestration process.

Parts of Sales Orders That You Can Use During Fulfillment

Use these parts to monitor and manage order fulfillment:

Part of Sales Order	Description
Order	<p>Includes order lines:</p> <ul style="list-style-type: none"> The relationship between a sales order and an order line is similar to the relationship that exists between a source order and a source order line. A sales order in Order Management might not exactly mirror the structure of a source order in a source system.
Order line	<ul style="list-style-type: none"> The relationship between a sales order and order lines preserves some of the original structure of the source order, making it easier to keep track of the original intent of the source order, even if Order Management splits order lines for the sales order.
Order line that you have submitted to fulfillment	<p>Part of a sales order you can modify in the Order Management work area. For example:</p> <ul style="list-style-type: none"> Schedule or unschedule an order line. Reserve items for an order line. Substitute an item on an order line. Change the warehouse, shipping method, or demand class on an order line.
Orchestration process	<p>An order administrator can set up an orchestration process to determine the tasks that the process does.</p> <p>You can't modify an orchestration process in the Order Management work area, but you can monitor an instance of it while it manages the order line, and monitor progress.</p>
Return order line	<p>Represents an order line that Order Management uses to return items. Its similar to an order line, but it includes a set of attributes that are specific to returning items.</p>

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Create Sales Orders](#)
- [How Order Management Processes Change Orders](#)

How Order Management Fulfills Order Lines

Order Management processes order lines so your downstream systems can fulfill them.


Assume you create a sales order for a laptop computer that comes with accessories, such as a docking station and mouse, then submit:

New Sales Order

Submit Order

Draft

Business Unit Vision Operations Customer Computer Service and Rentals Order Total >



Line	Quantity	Item	Price
1	1	Laptop	700 USD
1	1	Accessory Package	225 USD

Save ▼ Submit Cancel





Order 521794

Create Revision

Processing Last updated 7 hours ago

Business Unit Vision Operations Customer Computer Service and Rentals Order Total 2 >

Item	Order Line	Submitted Order Line	Quantity
Laptop	1	1-1	1
Accessory Package	2	2-1	1
Docking Station	2.1	2.1-1	1
Mouse	2.2	2.1-2	1
AC Adaptor	2.3	2.1-3	1
Keyboard	2.4	2.1-4	1

Order Management processes the order:

- Processes two order lines into six order lines.
- Uses the price from the source order to set the price in the sales order.
- Processes the line for the laptop in the source order to order line 1.
- Processes the Accessory Package in the source order to more than one order line. Each line represents part of the content of the Accessory Package, such as docking station, mouse, AC adapter, and so on.

Related Topics

- [Create Sales Orders](#)
- [How Order Management Processes Change Orders](#)

2 Manage Sales Orders

Create and Manage

Sign Into Order Management

Sign into Order Management so you can create and manage sales orders.

1. Get the details you need:
 - URL that provides access to Order Management.
 - User account and password you can use to access pages in Order Management. Your user account must reference a role that has the privileges you need to manage sales orders.

For details, ask your order administrator.

2. Use a Web browser to navigate to the URL that your order administrator provides.
3. Sign in on the Order Management sign in page, then create new sales orders or manage an existing one.

Related Topics

- [Create Sales Orders](#)
- [Overview of Managing Sales Orders](#)

Create Sales Orders

Use the New Sales Order page in the Order Management work area to create one.

For an example sales order, see [Overview of Managing Sales Orders](#).

Assume you must create a sales order for your Computer Service and Rentals customer, and for the AS54888 Standard Desktop item.

For more, see [AI: Sales Order Assistant](#).

Negative Values

A negative value usually means the sales order includes an item that someone returned. Here's what Order Management does when your sales order includes a return:

- Displays the return on a separate order line on the order page.
- Displays the price of each returned item in red font.
- Subtracts the value of each return from the order total.
- If the values of the returns are greater than the value of the order lines that Order Management hasn't returned, then it uses red font to display the value in the Order Total attribute. Red font indicates the value is negative.

Related Topics

- [How Order Management Converts Source Orders Into Sales Orders](#)

Copy Sales Orders

Save time. Copy a sales order that already exists instead of creating a new one.

Assume you have sales order 525874, and you need to copy it:

1. Go to **Home > Order Management > Order Management (New)**, then search for and open sales order 525874.
2. Click **More Actions > Copy Order**.
3. Select the data that you want to copy.

If you don't select any options, the copy action will copy the order header values and the order lines.

4. Click **Create Copy**.

Order Details

Assume you have sales order 525874, and you need to copy it:

If You Enable This Option	Then Order Management
Additional Information	Will copy all additional information from 525874's order header to the new order header's additional information.
Attachments	Will copy all attachments from 525874's order header to the new order header's attachments.

Order Line Details

Use these options to specify whether to copy data from each line on order 525874 to a single line on the new order. For example, assume order 525874 has lines 1 and 2, line 1 has an attachment named MyAttachment, and line 2 doesn't have any attachments. If you enable the Attachments option, then Line 1 on the new order will have MyAttachment and line 2 won't have any attachments:

If You Enable This Option	Then Order Management
Additional information	Will copy the additional information from 525874's order line to the line in the new order.
Attachments	Will copy the attachment from 525874's order line to the line in the new order.
Billing Plan	Will copy the billing plan from 525874's order line to the line in the new order. The new line will include the billing frequency, such as one-time billing or recurring billing, from 525874's order line.
Unreferenced Return Line	Will copy details about each unreferenced return line from 525874 to the line in the new order. For details about unreferenced return lines, see Return Items Without Original Sales Order .

Pricing

If You Enable This Option	Then Order Management
Freeze Pricing and Shipping Charges	<p>Won't reprice the new order. Instead, it will use the pricing from order 525874, including any manual price adjustment that you made on order 525874.</p> <p>The new order won't include price changes that happened since you created the copied order, such as a price increase or decrease. To update pricing on the new order, you can click Save.</p>
Freeze Tax	<p>Won't calculate tax on the new order. Instead, it will use the tax from order 525874.</p> <p>If you want to enable the Freeze Tax option, you must first enable the Freeze Pricing and Shipping Charges option.</p>

Sales Credits

If You Enable This Option	Then Order Management
All	Will copy all the sales credits from order 525874 for all order lines, including credits that you have overridden on any of 525874's order lines.
None	Won't copy any sales credits from order 525874.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Cancel Sales Orders](#)
- [Return Sales Orders](#)

Manage Sales Credits for Sales Orders

Use a sales order's Sales Credits attribute to assign the revenue percentage and nonrevenue percentage of the sales credit that each salesperson whose involved with the sales order receives.

Order Management distributes the credit according to how you set these percentages. You can also manage sales credits on the order line.

A sales credit is a percentage of the total revenue of a sales order that a salesperson receives as commission for the order. Use it to:

- Report on salesperson performance.
- Report on achieving quota.
- Assist with calculating compensation.
- Assist with forecasting according to territory.

You can set these percentages:

Sales Credit Assignment	Description
Revenue Percentage	<p>Set the percentage of the total revenue that the salesperson receives as commission for work they do that's directly related to selling the sales order.</p> <p>You must distribute exactly 100% of the total revenue of the sales order.</p> <p>Assume the revenue for a sales order is \$100 and you add two salespeople in the Manage Sales Credits dialog:</p> <ul style="list-style-type: none"> • If you set the revenue percentage for one salesperson to 60, then you must set the revenue percentage for the other salesperson to 40. • If you add only one salesperson, then you must set the revenue percentage to 100.
Nonrevenue Percentage	<p>Set the percentage of the total revenue that the salesperson receives as commission for work they do that isn't directly related to selling the sales order. For example, for revenue from a sales bonus.</p> <p>You can specify a distribution of the percentage that's equal to any fraction of the total revenue of the sales order.</p>

Your order administrator uses Trading Community Architecture to set up each salesperson as a resource when the salesperson is a member of a sales organization. Order Management displays the salespeople who are related to the business unit in the Manage Sales Credits dialog. Consult your company policies to determine the salespeople you must add and the percentages to enter.

Order Management sends the sales credit details that you set to Oracle Receivables, which then sends details to Oracle Incentive Compensation so it can pay commission. For details about sales credits and percentages, ask your order administrator.

Related Topics

- [Create Sales Orders](#)

Search Sales Orders and Order Lines

Search Attributes for More Than One Value

If you specify more than one attribute when you search, then Order Management uses an AND condition.

Assume you have these sales orders in your database:

Sales Order	Status
44444	Awaiting Billing
55555	Processing
66666	Draft

Assume you do this search:

Attribute	Value
Order	Equals 44444
Status	Equals Awaiting Billing

The search results will contain order 44444.

Assume you do this search:

Attribute	Value
Order	Equals 44444
Status	Equals Draft

The search results won't contain any value.

If you specify more than one value for the same attribute, then Order Management applies an OR condition on that attribute. Assume you do this search:

Attribute	Value
Status	Equals Draft
Status	Equals Processing

Order Management applies an OR condition between the status values:

`Search for order Status equals Draft, or Status equals Processing.`

Filter Your Search

Most attributes that you can search display the top 10 values according to how frequently they occur on your sales orders or order lines, by default. For example, click Line Status but don't enter any characters, and you might see:

1. Not Started (1982)
2. Scheduled (565)
3. Awaiting Shipping (1467)
4. Manual Scheduling Required (782)
5. Closed (348)
6. Picked (435)
7. Billed (303)

If that list doesn't contain the values you seek, then enter a few characters. For example, enter *await*, and you might see:

1. Awaiting Shipping (1467)
2. Awaiting Billing (831)
3. Awaiting Fulfillment (396)
4. Awaiting Receiving (222)

5. Awaiting Response (180)

For details about how search works, see [Overview of Search](#).

Add Conditions to Your Search

Search on Order Management's redesigned pages uses some special characters as delimiters, such as the space (), hyphen (-), and comma (,). You can use them to create an OR condition in your search. You can use the underscore (_) to create an AND condition.

Assume you need to search the Warehouse Code attribute on the order header for the value 111-222, and you have these sales orders:

Sales Order	Warehouse Code
1	111
2	222
3	111-222

If you search for 111-222, your search will return orders 1, 2, and 3. If you search for 111_222, your search will return order 3.

Search for Your Specific Values

Most attributes that you can search display the top 10 values according to how frequently they occur on your sales orders or order lines, by default. For example, click Line Status but don't enter any characters, and you might see:

- Not Started (1982)
- Scheduled (565)
- Awaiting Shipping (1467)
- Manual Scheduling Required (782)
- Closed (348)
- Picked (435)
- Billed (303)

If that list doesn't contain the values you seek, then enter a few characters. For example, enter *await*, and you might see:

- Awaiting Shipping (1467)
- Awaiting Billing (831)
- Awaiting Fulfillment (396)
- Awaiting Receiving (222)
- Awaiting Response (180)

Improve Your Saved Searches

Make your saved searches more powerful, configurable, and collaborative.

Administer

- Set up and administer saved searches and provide them to all of your users.
- Add columns and filters, then let your users decide whether to use them.
- Set a default search to make sure you have a consistent experience for your users and teams.

Use

- Use your own filters.
- Specify column layout and sort order.
- Edit or delete existing saved searches at any time.
- Set a saved search as your personal default.

Try it:

1. Go to **Home Page > Order Management > Show More > Search Views for Sales Orders** .
2. On the Search Views page, search for one of:
 - Sales Order Lines Search View
 - Sales Order Search View
3. Click **Results Columns** , then specify the columns that you want to display.
4. Click **Filters** to specify the filters that you want to display.

Test:

- Create a saved search.
- Select the columns that you want to display or hide.
- Click **Copy Link** to share your saved search.

Note

- If you use Search View Configuration to remove an attribute from your search view, then search automatically removes that attribute from all saved searches. Search does this to make sure your configured view and saved searches are consistent and to help prevent errors or broken views.
- If the saved search is your default search, then you must first remove it as the default search then add the new attribute. As an option, you can then set it as the default search.

See [Redwood: Improve Your Saved Searches](#).

Approvals and Trade

Get Approvals for Sales Orders

Your order administrator might set up the Order Management work area so someone must approve your sales order before sending it to order fulfillment, according to an approval rule.

Here's an example that includes one Order Entry Specialist and three approvers:



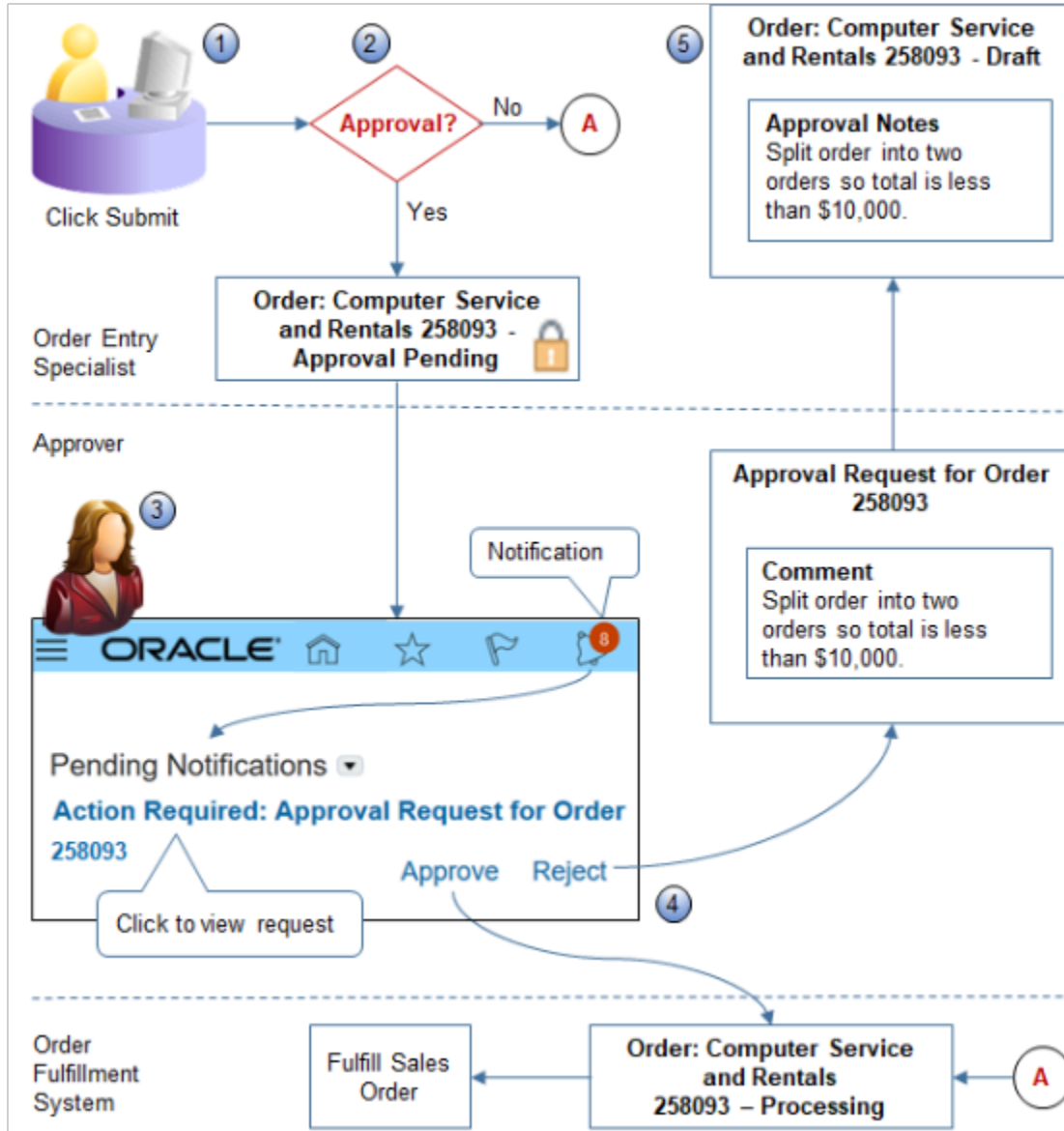
Order Management can route the sales order to each approver and track approval status while each approver finishes approval.

How Approval Works

Assume the sales order total exceeds \$10,000 and your order administrator set up a rule:

- If the sales order total exceeds \$10,000, then get approval.
- Send the approval request to your manager.

Here's the flow that this example uses:



Note

1. You create a sales order in the Order Management work area, then submit.
2. If your order administrator set up approvals, and if the sales order meets the approval rule, then Order Management sets the status to Approval Pending, locks the sales order so you can't edit it, adds a lock icon immediately to the right of the order status, then sends a notification to the approver.

To get details about the current state of the approval process, in the order header, click **View Approval Information**.

3. Order Management adds a notification to the banner in the approver's work area. The approver can click the request to get details about it, add a comment, then approve or reject the request.

4. If the approver:
 - o **Approves.** Order Management sets the order status to Processing and sends the sales order to order fulfillment.
 - o **Rejects.** Order Management unlocks the sales order, sets the order status to Draft, allows the approver to add a comment, then sends the sales order back to you for rework.
5. If the approver rejects the approval request, then Order Management displays a comment that the approver added. It displays the comment as a note in the Approval Notes tab of your sales order. You can now modify the sales order and resubmit it to restart the approval process.

The approval rule in this topic is only one example. Your order administrator might set up a variety of approval rules and different approvers:

- o A rule might test for the value of other attributes, such as quantity, a price override, and so on.
- o Approvers might include more than one person, or a group of people, such as a Sales Manager and a Sales Director.
- o Approval Notes might display details about each approver.

If your order administrator also sets up credit check, then the credit check happens first, then approval. For details, see [Release Holds for Order Lines That Fail Credit Check](#).

Ask your order administrator for details about how approvals work for you.

Related Topics

- [Order Management Statuses](#)
- [Release Holds for Order Lines That Fail Credit Check](#)

Approve Sales Orders

Approve or reject a sales order.

Assume you're an Order Manager and you must approve any sales order that exceeds a total of \$10,000. You receive a request to approve sales order 258093, but it exceeds \$10,000. Your company policy states to split each sales order that exceeds this amount into more than one order so no order exceeds this amount:

1. On the banner, click **Notifications** (the bell icon).
2. Examine the Pending Notifications list, then click the **link** that's requesting approval.

For example, click **Action Required: Approval Request for Order 258093**.

3. Use the Approval Request page to get details:

Approval Request for Order 258093

Reasons MPArule

Details

Assignee scmoperations

Creator scmoperations

Order [View Order Details](#) Take action View order

Currency = US Dollar

Customer Computer Service and Rentals

Ordered Date 7/2/19 4:42 PM

Total 2628.00

Item	Amount
AS54888-Standard Desktop	Sale Price 2,000.00

History

Order Approval Stage

Patric

Comments

Split order into two orders so total is less than \$10,000.

Send comment to requester

Approval

Sales Order

Note

- Click **View Order Details** to view the sales order.
- Examine the History area. More complex approvals might include several approval levels. The history illustrates who, what, and when for the approval. Such as who requested it, and who has approved it so far.

4. Add a comment.

Split order into two orders so total is less than \$10,000.

The comment stays with the sales order regardless of the action you take. If you reject the approval, then approval sends the sales order and your comment back to the requester.

5. Click **Reject**.

Approval sets the sales order status to Draft, then sends it back to the requester with your comment. You can take these actions:

Action	What Approval Does
Approve	Change the Order Status from Pending to Processing, then send the sales order to order fulfillment.
Reject	Change the Order Status from Pending to Draft, and send the sales order back to the requester.
Request Information	<p>Add a comment to the request, then send the request to the requester or someone else who can provide the details you seek.</p> <p>Assume the sales order exceeds \$10,000 but you recall that your purchasing organization set up a special agreement some time during the fiscal year with your Computer Service and Rentals customer that approves sales orders up to \$20,000. You use Request Information to specify the purchasing agent, and add a comment:</p> <p>Please verify we have an agreement that approves sales order up to \$20,000 for Computer Service and Rentals. Please reply with the agreement number.</p> <p>You can send the request to an individual, group, or role.</p> <p>You can specify whether approval sends the reply only to you, or also sends it to others in the approval flow so they can examine the request with the new details and redo their action, as necessary.</p>
Reassign	Assign or delegate the approval request to someone else, a group, or a role.
Create Subtask	<p>Add other approvers. Add another person, a group of people, or a chain of approvers.</p> <p>A subtask is an approval within the existing approval. Set the priority to specify which subtask takes precedence in the parent approval, with priority 1 taking the highest precedence.</p> <p>Assume you create subtask x with priority 1 and subtask y with priority 2. If the folks on approval flow x approve the request, and the folks on approval flow y reject the request, then approval considers the request approved, sets the status to Processing, and sends the sales order to fulfillment.</p>
Escalate	Escalate the request to someone higher up in the approval hierarchy.
Suspend	Pause approval for the request. Approval won't assign the request to anyone else until you do another action.
Withdraw	Remove the approval request from the approval flow. You can only withdraw a request that you create.
Save	Save changes you made in the request, such as adding a comment or attaching a file, but don't take any other action.

Your order administrator determines the choices that you can make for some actions, such as Reassign or Escalate. For example, the administrator might set up the groups and roles that you can reassign to, or managers you can escalate to. Ask your order administrator for details.

I Don't See My Notifications

If you click the bell but don't see your notifications, try this:

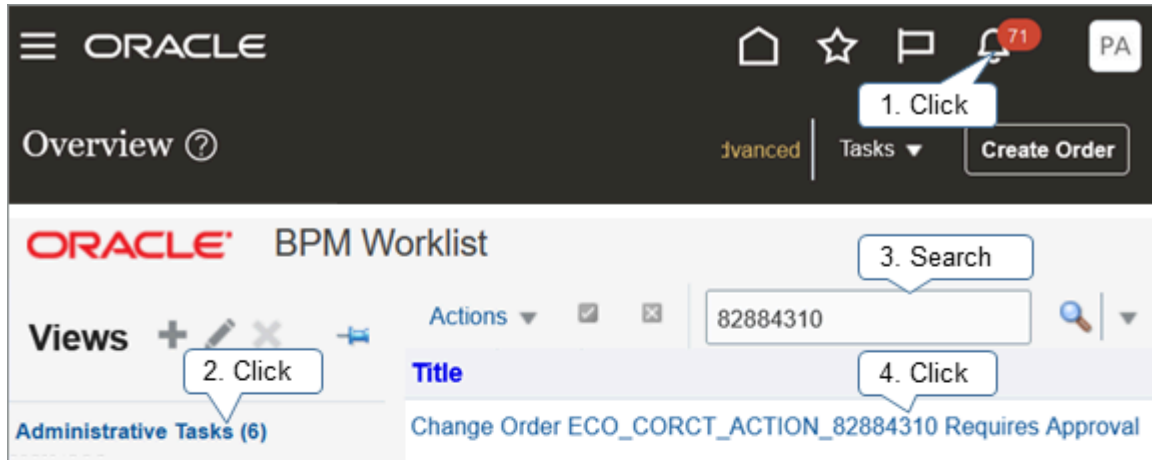
1. Click the **bell**, then click **More Details**.
2. On the BPM Worklist page, click the **down arrow** next to your name, then click **Administration**.
3. Set the value:

Attribute	Value
Notification Mode	Set a value: <ul style="list-style-type: none">○ All. Display notifications when I click the bell and also send me an email that has the notification.○ None. Don't display or send any notifications.○ Email. Send me an email that has the notification. Don' display notifications when I click the bell.○ In-app. Display notifications when I click the bell. Don't send me an email.

You can send a notification only one time. You can't resend a notification for approval.

Examine Approval Details

You can use the BPM Worklist to examine details about the approval, such as the status, who the approvers are, the assignee, the approval history, whether the approval was canceled, and so on.



Change Order ECO_CORCT_ACTION_82884310 approval

Header Details

Change Order	ECO_CORCT_ACTION_82884310		
Task Number	234764	Response Required From	One
Approval Status	Submitted for Approval	Sign Off As	Individual

Approval History

Assigned to Web Services Application Identity for SCM	8/28/22 3:44 PM
Assigned to Product Information Management Quality Assurance	8/28/22 3:44 PM
Submitted by AUTO PLM	8/28/22 3:44 PM

1. Sign into Oracle Applications with the privileges from one of these predefined job roles:
 - o BPM Workflow System Admin Role
 - o BPM Workflow Supply Chain Administrator

This topic uses predefined job roles. Your administrator must create your own job roles, depending on your security requirements. For details, see *Get the Privileges That You Need to Implement Order Management*.

2. Disable any popup blockers that you have on your browser.
3. On the banner, click **Notifications** (the bell icon), then click **More Details**.

Order Management opens the BPM Worklist in a separate window.

4. Click **Administrative Tasks**.
5. Search for sales order 82884310, then examine the details.

If a sales order seems to be stuck, such as in Cancellation Requested status, you can use the Approval History area to see who is currently assigned, then send a request to that person to approve the request or to cancel the sales order.

Related Topics

- [Order Management Statuses](#)
- [Release Holds for Order Lines That Fail Credit Check](#)
- [Overview of Notifications and Approval Workflows](#)

Manage Sales Orders That Require Trade Compliance Screening

Your order administrator might set up Order Management so it screens sales order for trade compliance. Use this topic to learn how to create a sales order that requires trade compliance.

If your order administrator hasn't set up trade compliance, then Order Management doesn't display some of the attributes that this topic describes.

Create a sales order that undergoes trade compliance screening:

1. Go to the Order Management work area, then create a new sales order.

For details, see [Create Sales Orders](#).

2. On the New Sales Order page, complete the order header, add an order line, then submit.

If Order Management screens sales order for trade compliance, then the order header displays a status of Trade Compliance Screening Is Pending and a lock icon.

The lock icon indicates that Order Management is screening the sales order to determine whether it meets the trade compliance policies that your order administrator set up.

3. Click **Refresh**.

Notice that the sales order status is Processing and the lock icon is gone, which indicates the sale order passed trade compliance screening and Order Management released it to order fulfillment.

Note

- Order Management usually finishes screening without delay. However, some screening might require up to several minutes or more to finish.
- If necessary, click **Refresh** until the status changes.
- If the sales order doesn't move to order fulfillment, then you can cancel the submit for a locked sales order that Order Management is processing. Click **Actions > Revert to Draft**. Order Management will set the order status to Draft and stop screening.

4. Notice the value of the Trade Compliance Status attribute.

Order Management uses these colors to indicate trade compliance status:

Color	Status	Description
Green	Passed	The sales order passed trade compliance screening.

Color	Status	Description
Red	Failed	The sales order failed trade compliance screening because it doesn't comply with one or more trade compliance policies.
Yellow	Under Review	A compliance manager is examining the sales order.

- Click **View Details** next to Trade Compliance Status.

Use View Details to determine the type of trade compliance and the status for the type that Order Management screened, such as Restricted Party passed, or Trade Control passed.

This example indicates that AS54888 passed trade control policy, but failed screening for restricted party and sanctioned country:

Trade Compliance Details

Order Status ●

1 – AS54888

Screening Date 10/8/2015

Restricted Party ● [View Details](#)

Sanctioned Country or Territory ● [View Details](#)

Trade Control ●

2 – ATT685

Screening Date 10/8/2015

Component Details 

Restricted Party ●

Sanctioned Country or Territory ●

Trade Control ●

Slimline Tablet is a configured item. If your sales order includes a configured item, then click **Component Details** to get details about each component that the configured item contains. The status of a configured item represents the status for the entire configuration.

- Click **View Details** next to Sanctioned Country or Territory.

7. Examine the details that display.

The details in this example indicate the type of trade control that caused screening to fail, such as Anti-Terrorism, and details about the type, such as Atomic Energy Act:

Sanctioned Country or Territory: Line 2 – Failed	
Trade Control Type	Comment
Anti-Terrorism	Atomic Energy Act
Firearms Convention	Export Administration Regulations

Monitor Trade Compliance

1. Go to the Order Management work area, then display the Trade Compliance Status attribute.
2. Set the Trade Compliance Status to a value, such as Under Review, then search.
3. Display the Trade Compliance Status attribute on the order line.
4. In the search results, click the **link** in the Order column for the sales order that you must monitor.

Related Topics

- [Create Sales Orders](#)
- [Fix Problems and Improve Performance](#)
- [Overview of Setting Up Trade Compliance](#)

Agreements

Sales Agreements

Add a sales agreement that applies pricing terms to your sales order when a customer frequently buys from your company, such as offering a reduced price when buying an agreed-to quantity of an item over time.

A contract is a written document between buyer and seller. It specifies terms that apply for your customer. It allows the customer to receive a favorable price and for you to improve your future cash flow predictions.

Order Management can automatically apply contract terms to each sales order to achieve benefits:

- Reduce processing time.
- Reduce error.
- Avoid negotiating contract terms for each sales order.
- Avoid manually entering contract terms.


For example:

Contract Header

Attribute	Value
Customer	Computer Service and Rentals
Business Unit	Vision Operations
Number	101

Your customer. . .

. . . and adjustment for each item.



Agreement Lines

Line	Name	List Price	Adjustment Type	Adjustment
1	AS54888, Desktop Computer	\$1,000	Discount Percent	10%
2	CM15140, 19" Monitor	\$200	Discount Amount	\$20
3	TBL666, Computer Table	\$400	Discount Amount	\$30
4	PROC86, Fast Processor	\$300	Markup Percent	20%
5	VR69, VR Helmet	\$700	Markup Amount	\$50

Each contract contains a header that specifies your business unit, such as Vision Operations, your customer who purchases the item, such as Computer Service and Rentals, and a number that identifies the contract, such as 101.

Each contract contains one or more agreement lines. Each agreement line contains attributes:

Attribute	Description
Name	Identifies the item. Each agreement line applies to one item, such as AS54888 Desktop Computer. If the contract doesn't include an item, you can still add it to the sales order, but the order won't apply an adjustment.
List Price	Starting price for the item.
Adjustment Type	<ul style="list-style-type: none"> Discount Percent. Discount Amount. Markup Percent. Markup Amount.
Adjustment	Numeric value of the adjustment.
Start Date	Date when the agreement goes into effect.

Attribute	Description
End Date	Date when the agreement expires.

Assume List Price for item AS54888 is \$1,000 and the adjustment is a 10% discount. If your customer buys 80 laptops on order line 1 in sales order 75839, then the sales order calculates the remaining amount that's available for purchase in the agreement:

Calculation	Description
\$1,000 list price minus \$100 discount.	Price after discount for quantity of one: \$900.
\$900 discounted price multiplied by quantity 80.	Net price on order line: \$72,000.

Note

- The sales order only displays the agreement when the current date happens on or after Start Date, and on or before End Date. If the current date doesn't happen in this date range, then the sales order doesn't display the agreement.
- If End Date is empty, then the agreement never expires.
- Your order administrator sets up agreements and contracts. For details about them, including the ones you can select, quantities available, discounts that apply, and so on, contact your order administrator. For background, see [Overview of Setting Up Sales Agreements in Order Management](#).

Add Sales Agreements to Sales Orders

Create a sales order that includes a sales agreement.

Assume your order administrator set up this agreement, and that today is 9/11/19:

Attribute	Value
Customer	Computer Service and Rentals
Business Unit	Vision Operations
Sales Agreement	101
Item	AS54888
Adjustment	10% discount

Attribute	Value
Start Date	1/1/19
End Date	12/31/19

You will create this order:

Order 524201

Draft

Business Unit **Vision Operations** Customer **Computer Service and Rentals** Order Total **0,00 USD**

Order Management

Business Unit
Vision Operations

Customer
Computer Service and Rent: ▼

Bill-to Account Number
1006 ▼

Sales Agreement
SA1 ▼

Sales Agreement Version
1

Additional order details

Set agreement on header. . .

. . . or line.

	Line	Item	Sales Agreement	Sales Agreement Version	Sales Agreement Line
<input type="checkbox"/>					
<input type="checkbox"/>	1	AS54888			

Note

- You can set the agreement on the order header and on the order line.
- In order line 1, the agreement is available for item AS54888, its applied, and the amount is \$900.
- In order line 2, the agreement is available, but not applied, and the amount is \$1,000.
- In order line 3, no agreement is available because the order administrator didn't set up one for item AS92888.

Add a sales agreement to a sales order:

1. Create a sales order.
2. Set the Customer attribute to Computer Service and Rentals.
3. Set the Sales Agreement attribute on the order header to 101.

4. Add an item:

- o Search for item AS54888 on the order line.

Order Management prices the item depending on whether the agreement:

- **Is available.** Prices the item according to the agreement. An agreement is available only if the order administrator defined an agreement for the item, customer, and business unit, the agreement isn't expired, and it doesn't exceed the commitment amount.
- **Isn't available.** Prices the item in the same way it prices an item that doesn't include an agreement.
- o Notice that the order line displays a price of \$900, which is \$1,000 minus 10%.
- o Click **Apply**.
- o Notice the order line's attributes:

Attribute	Description
Amount	\$900. The amount includes the discount.
Sales Agreement	If an agreement is available for the item, then you can use the sales order to set the agreement for each order line.
Sales Agreement Line Sales Agreement Version	A contract can include one or more agreement lines, and one or more versions of the contract can exist. Your order administrator uses these attributes to help manage the agreement.
Contract Start Date Contract End Date	These attributes apply only to a service contract, not a sales agreement, so leave them empty.

5. Normally, you now submit. For this example, so you can experience the functionality that's available, instead, remove the value from the Sales Agreement attribute on the order header.

In the dialog that displays, select a value. This feature is most useful when several agreements are available and your order includes several order lines:

Value	Description
Lines That Contain Original Value	Remove the discount only from order lines that contain agreement 101. For this example, select Lines That Contain Original Value, and notice that the sales order removed the discount from Amount on the order line, which is now \$1,000.
All Lines	Remove the discount from all order lines.

Value	Description

Note

- o Assume the original value for the Sales Agreement attribute on the order header is 101 and you change it to 102.
- o Assume only order line 1 contains 101 in the Sales Agreement attribute on the order line.
- o If you click:
 - **Lines That Contain Original Value.** Order Management applies the change only to order line 1.
 - **All Lines.** Order Management applies the change to order lines 1, 2, and 3.

6. Add an item when the agreement on the order header is empty:

- o Search for item AS54888 on the order line.
- o Notice that the order line displays a price of \$1,000, which is the full price without the discount, then click **Apply**.
- o On the order line, notice that Amount is \$1,000, and Sales Agreement is empty.
- o On the order line you just added, set Sales Agreement to 101, then notice that the order line changes Amount to \$900. It applied the discount to the line.

7. Add an item that doesn't have an agreement:

- o Search for item AS92888 on the order line, then click **Apply**. Assume no agreement is defined for AS92888.
- o On the order line, notice that Amount is \$1,000, and Sales Agreement is empty.

Revise and Copy

If you submit the sales order and then, at some later time must change the sales agreement on the order header or order line, then create a revision first, then change the agreement. The original agreement might or might not be available. For example, the original agreement might have expired or someone might have revised it.

If you copy a sales order that includes an agreement, then the copy will also include the agreement. You can change the agreement on the copy, as necessary.

If an order line has an agreement, then you can revise the line only if the Contract Start Date happens on or before the current date and if the Contract End Date happens on or after the current date.

Return Items

If you reference the original return when your create a return order:

- Order Management copies the sales agreement to the return order header, and you can modify it. You can create a return that includes return lines and ship lines.
- If you change the agreement on the order header, then Order Management applies your change to new lines that you add to the return, but doesn't apply your change to return lines that already include an agreement.
- Order Management doesn't allow you to change the order line agreement that it copies from the original order.

If you don't reference the original return when you create a return order, then Order Management applies the same behavior it applies for agreements when you create a new sales order that isn't a return.

Related Topics

- [Return Items Without Original Sales Order](#)
- [Create Sales Orders](#)

Projects

Add Projects to Sales Orders

Project details include the project, task, expenditure type, expenditure organization, expenditure item date, funding source, work type, contract number, your own custom attributes, and so on. You can add to your order to reduce order processing time and improve the accuracy of how you track cost, revenue, and profitability.

Use a Redwood page to add project details to your sales order. Automatically cascade project details from the order header to default values on the order line. Select more than one order line and update project details in a single action.

Realize these benefits:

- Make order entry efficient. Reduce the time you need to enter project details on the order header and order lines. Update project details across more than one order line in a single action. Reduce manual work and data entry errors.
- Make your projects more visible. Save project details on each sales order so you can improve tracking, reporting, and downstream fulfillment.
- Allocate and control inventory effectively. Fulfill sales orders that reference the same project from a single, designated inventory.
- Use a flexible shipping strategy. Fulfill sales orders from project inventory or from common inventory according to business rules that you set up.
- Automate how you reserve inventory. Use order orchestration to automatically reserve quantity from project inventory, common inventory, or project and common inventory so you can optimize fulfillment and meet your project and supply strategies.

Try it:

1. Create a sales order, set the business unit and customer on the order header, then click **More Actions > Project Details**.

The customer, business unit, and item determines the projects that you can select on the order line, depending on how your order administrator sets up Order Management. For details, see [Overview of Setting Up Projects in Order Management](#).

2. Set project details for the order header:

Attribute	Value
Project	Select a project from Oracle Project Management, filtered according to the order's business unit and the warehouse's business unit.

Attribute	Value
Task	Select a task, filtered to the project.
Expenditure Item Date	. Select a date, filtered to when the project is active.
Expenditure Type	Select a type, filtered to the project and task.
Expenditure Organization	Select an organization, filtered to the project and task

If you want to set these optional attributes, you must set up Oracle Grants Management so it supports your project:

- Contract Number
- Funding Source

As an option, click **Apply to Lines** and Order Management will cascade your selections to the order lines that are currently on the order. If you add a new line or update these header attributes at some later time and want to cascade, then you must click **Apply to Lines** again.

Edit Order Lines

You can also view, edit and set project details on each order line. Select the lines that you want to edit, then click **Edit**.

Next, edit or add the project details.

If you select:

- One line. Order Management displays the project details for that line. Make your changes, then click **Apply** to apply them to the line that you selected.
- More than one line. Order Management doesn't display any project details. Set your values, then click **Apply** to apply them to all the lines that you selected.

Update Project Details

The project details that you can set depend on the order's status:

Status	You Can
Draft	<ul style="list-style-type: none"> • Add or update project details on the order header and order lines.
Submitted	<ul style="list-style-type: none"> • Add or update project details only on the header. • You can't update project details on the lines. They're read only.
Update After Submit	<ul style="list-style-type: none"> • If you update project details on the header and click Apply to Lines, then Order Management will apply them only to new lines that you haven't submitted. • Add project details to revised orders only for new lines. • You can't update project details on order lines that you submitted. They're read only.
Revise	<ul style="list-style-type: none"> • You can add project details only to new lines, not to lines that you already submitted.

Set Up

1. Opt in to the Project-Driven Supply Chain feature in the Manufacturing and Supply Chain Materials Management offering.
2. Enable the ORA_RCS_ENABLE_PROJECTS_IN_SCM_PRC profile.

For more, see [Overview of Setting Up Projects in Order Management](#).

Guidelines

You can:

- Add project details to an item that isn't configured, to a configured item, a subscription, or coverage.
- Use the Project attribute and the Task attribute when you search for a sales order in the Order Management work area.
- Use project attributes in your Oracle Transaction Business Intelligence (OTBI) reports, such as Project, Task, Expenditure Organization, Expenditure Type, and so on.

You can't:

- Add project details to a child configurable option, but you can add project details to the parent configured item. If you add project details to the parent, then the sales order also adds them to each child.
- Search on or create a report according to a project attribute.
- Add project details to a return order, even if the original order line contains project details.

If you submit the sales order, and then revise it:

You Can	You Can't
<ul style="list-style-type: none"> • Modify attributes that don't contain project details on the order line, such as Quantity, Payment Terms, Ship-to Address, Warehouse, and so on. • Add a new line with or without project details. • Cancel a line that does or doesn't contain project details. 	<ul style="list-style-type: none"> • Modify attributes that contain project details on the order line, such as Project Number, Contract Number, Expenditure Organization, and so on. • Change the project on the order line. Instead, delete the line, then create a new line.

Related Topics

- [Create Sales Orders](#)

Monitor Project Details in Sales Orders

Monitor project details through the order fulfillment lifecycle.

Examine Inventory

1. Sign into Oracle Applications with a privilege that you can use to access Inventory Management.
2. Go to the Inventory Management work area.
3. On the Inventory Management page, click **Tasks > Show Tasks > Shipments > Manage Shipment Lines**.

- On the Manage Shipment Lines page, query the Order attribute for the sales order you created in Order Management, such as 509396, then examine the results:

Order 509396

Draft

Business Unit **Vision Operations** Customer **Computer Service and Rentals**

Sales Order

Order Management

Monitor

Manage Shipment Lines

Search Order Equals 509396

Search Results

Actions ▾ View ▾

Summary Carrier Inventory Details Source Reference Other

Inventory Management

Projects

Item	Shipment	Project Sales Order	Order	Order Line	Order Schedule
AS92888	2399824	✓	509396	1	1

This shipment line is part of a project . . .

. . . in this sales order. . .

. . . on this sales order line

Note

- Use **Customize Columns** to display the columns you need.
- Examine the Project Sales Order attribute to identify lines that are part of the project. Project Sales Order indicates that the shipment line is part of the project. Shipping gets project cost details from the sales order and sends them to Cost Management to include these costs on the inventory transaction.
- Examine the Order attribute to identify the sales order and the Order Line attribute to identify the order line that the shipment line references.

5. Click **Cancel**, then, on the Inventory Management page, click **Tasks > Show Tasks > Inventory > Review Completed Transactions**.
6. Search the Source Reference attribute for the sales order number, then examine project details in the Project and Task area:

Review Completed Transactions

Search

Source Reference 509396

Query

Completed Transaction Details: 22603862

Transaction 22603862

Transaction Set 22603859

Transaction Date 10/11/18 9:30 PM

Transaction Type Sales Order Issue

Transaction Action Issue from stores

Transaction Source Type Sales Order

Source SALES_ORDER

Source Reference 509396

Transfer Transaction

Receiving Transaction

Costed N

Asset Tracking Status

Reason

Reference 412485

Error Explanation

Operation Number

Examine

Project and Task

* Project Number Blue prj 001

Task Number 1.1

Expenditure Item Date 10/11/18

Expenditure Type Material

Expenditure Organization Vision Operations

Projects

Note

- o Inventory Management processes the issue inventory transaction for the sales order, then sends project cost details to Cost Management.
- o Cost Management charges the project for the shipped items.
- o Notice the value in the Transaction attribute is 22603862. You will use it next.

Examine Accounting

Use the Cost Accounting work area to examine accounting for your project:

Review Cost Accounting Distributions

Search
Transaction Number Equals 22603862

Search Results

Cost Organization	Cost Book	Project Details
ZCST-Seattle	ZCST-Seattle	

Project Details

Project Name	Blue Semiconductor	Expenditure Type	Material
Task Number	1.1	Expenditure Item Date	10/11/18
Task Name	Product Concept	Expenditure Organization	Vision Operations

Depletion Layer 1

Cost Information | **Cost Distributions**

Accounting Line Type	Transactional Currency		Ledger Currency	
	Transaction Debit	Transaction Credit	Accounted Debit	Accounted Credit
Project Clearing	30.00 USD	30.00 USD	30.00 USD	30.00 USD
Project Clearing	5.00 USD	5.00 USD	5.00 USD	5.00 USD
Inventory Valuation	30.00 USD	30.00 USD	30.00 USD	30.00 USD
Inventory Valuation	5.00 USD	5.00 USD	5.00 USD	5.00 USD
	Total		35.00 USD	35.00 USD

1. Sign in with a privilege you can use to access Cost Accounting.
2. Go to the Cost Accounting work area.
3. On the Cost Accounting page, click **Tasks > Review Cost Accounting Distributions**.
4. On the Review Cost Accounting Distributions page, click **Advanced**, then query the Transaction Number attribute for 22603862, which is the value you noted earlier.
5. In the search results, click the icon in the Project Details column, then review your details.
6. Scroll down to the Depletion Layer area, then click **Cost Distributions**.

7. Examine the attribute:

Attribute	Value
Accounting Line Type	<p>Project Clearing</p> <p>Cost Accounting sets the Accounting Line Type attribute to Project Clearing so it can send project cost details to Project Costing.</p> <p>Project Costing charges the project for the shipped items.</p>

8. Examine values on the Project Clearing rows, such as:

- o Transaction Debt
- o Transaction Credit
- o Accounted Debt
- o Accounted Credit
- o Cost Element Type

Dual Units of Measure

What's a Dual Unit of Measure?

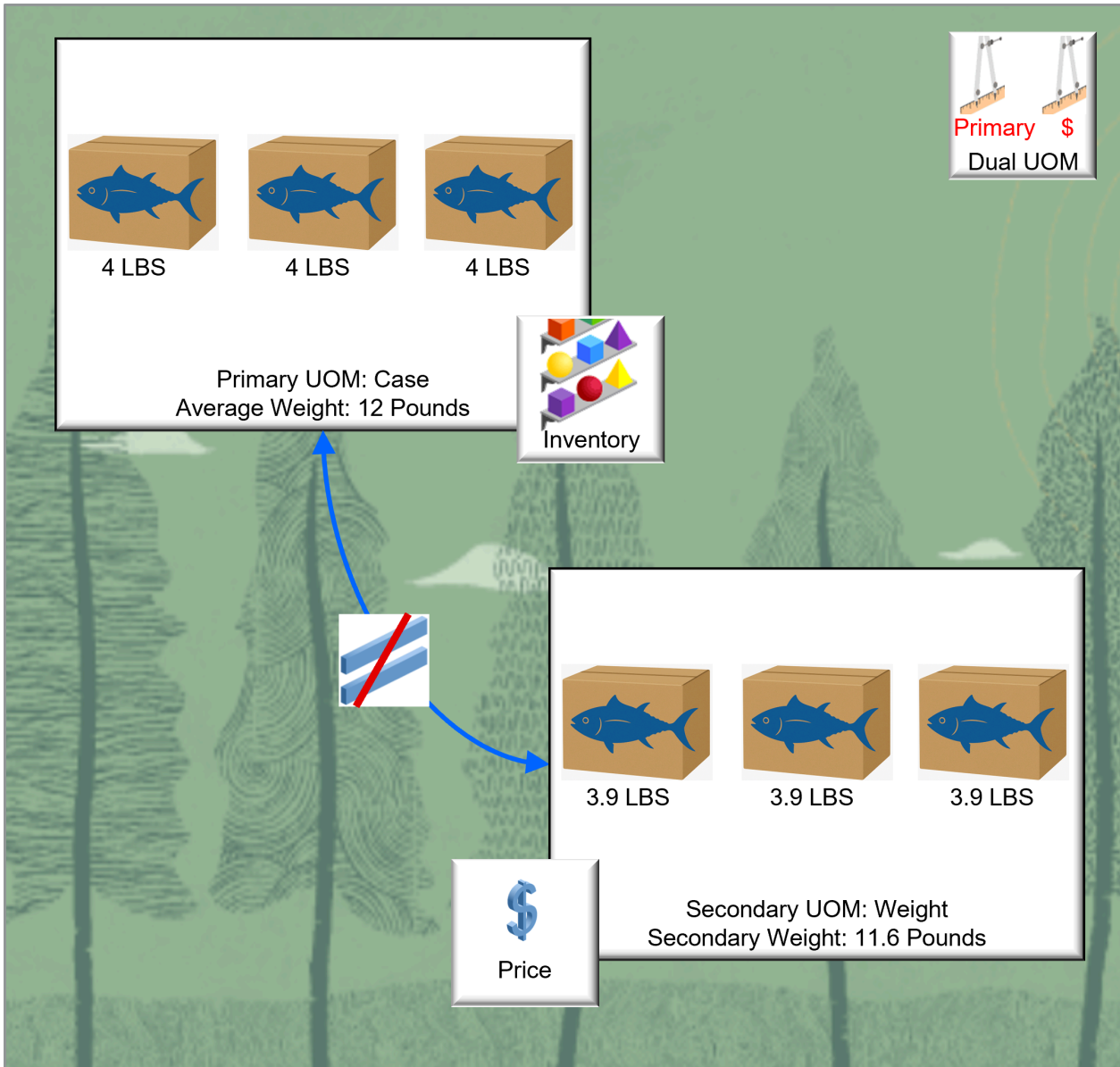
Use dual units of measure to order, price, manufacture, receive, pick, pack, and ship an item in the primary measure but price it in the secondary measure.

A *dual unit of measure* is an inventory management technique that manages an item's quantity in different measures at the same time, such as cases and pounds. You can use it to keep transactions and inventory accurate in each measure.

You might need to order, transfer, outsource, or buy an item in a unit of measure that's different from the unit of measure that you use to price and invoice it:

- You price fish by the pound but you sell the entire fish to your customer.
- You price steel by the ton but ship and receive it by the sheet.
- You price paper by the pound but ship and receive it by the roll.
- You price apples by the pound but ship and receive them by the bag.

Example



Note

- Weight for each fish is approximate because it naturally varies in size. 10 different fish will each sell for a different amount because each one has a unique weight. You might need to use the primary Case measure to stock your fish in inventory, but use the secondary Pounds measure to price it.
- A case of fish weighs an average of 12 pounds, and that's how you stock it.
- The actual weight just before you ship is 11.6 pounds, and that's the price you charge your customer.

Meet Your Requirements

You can use dual units of measure to meet these requirements:

- Track your item in the primary measure and in the secondary measure throughout your business flow. Use it through Oracle Order Management, Oracle Inventory Management, Oracle Procurement, and Oracle Manufacturing.

- Capture the item's actual weight that you sell, transfer, or purchase so you can accurately price, invoice, and cost it.
- Provide a price estimate when you sell or purchase so you can maximize value according to the exact weight that you ship or receive.

You can create an order line in the item's primary measure or in another measure that's in the primary measure's class, then convert that measure to automatically calculate quantity in the secondary measure:

- Track the item in a measure that's different from the measure that you use to stock the item. For example, use the primary Case to stock and track the quantity that your customer orders, and use the secondary Pounds to track the secondary quantity that you price and actually ship. You can use Case and Pounds simultaneously to track the item.
- Update the order line and automatically invoice it according to the quantity or the secondary quantity that you ship.
- Use and view two measures throughout your end-to-end supply chain. For example, start with the primary on the order line, then price and invoice in the secondary. Reserve, allocate, plan, produce, and ship in the primary.
- If you're doing an internal transfer, then you can create and fulfill the transfer order in the item's primary but calculate the transfer price in the secondary.
- Select the lot to use to fulfill the item during shipping.
- Revise a sales order. Add a new order line that uses dual measures to an existing order, or change the quantity on an order line that uses dual measures.
- Cancel an order line that uses dual measures.
- Cancel a sales order that uses dual measures. Order Management will automatically set the quantity and secondary quantity on all order lines to zero.

Realize these benefits:

- Improve the accuracy of the price that you charge your customer. Charge according to the quantity that you actually ship, in the secondary measure.
- Bill accurately so you can increase profitability.
- Improve your report's accuracy. Use secondary attributes in your report, such as the secondary quantity and the secondary measure.
- Increase revenue and improve customer satisfaction.

Support Your Business Flows

Order to Cash

You can use:

- Standard order.
- Back-to-back order. Use this feature to help you create the purchase order, transfer order, or work order when you use dual measures to fulfill demand in your back-to-back flow.
- Drop shipment. Create a sales order in the item's primary measure, then use the item's secondary quantity during fulfillment in your drop ship flow. If you want to use drop ship, then we recommend that you opt in to the Purchase Items That are Priced in Their Secondary UOM feature in the Procurement offering.
- Transfer order. Create a transfer order in the primary and automatically calculate the expected quantity in the secondary according to your conversion. Specify transfer pricing in the secondary according to the actual secondary quantity that you receive.

- Return order.

If a change of ownership happens between one business unit to another business unit, then Oracle Supply Chain Financial Orchestration orchestrates financial details and processes the transaction.

Procure to Pay

You can use:

- Purchasing. Create a purchase order in the primary and automatically calculate the expected quantity in the secondary according to a UOM conversion. Price the order line in the secondary and invoice it according to the actual secondary quantity that you receive.
- Self Service Procurement.
- Direct Procurement.
- Invoicing in Accounts Payable.
- Advance Shipment Notice.
- Pay on Receipt.
- Debit Memo.

Plan to Produce

You can use:

- Discrete Manufacturing.
- Process Manufacturing, including work definitions and work orders.
- Contract Manufacturing. Include dual measures in the production reports that you get from your contract manufacturer. Include a description of the materials used and what was finished. Include details in the primary measure and the secondary measure.
- Outside Processing.

For more about flows, see [Quick Start to Set Up Order-to-Cash](#).

Create Sales Orders for Items That Use Dual Units of Measure

Add a dual UOM item to an order line, then use one unit of measure to track quantity and another unit of measure to track price.

The screenshot shows the Oracle Order Management interface. At the top, there are navigation icons for 'Sales Order' and 'Order Management'. Below that, a search bar contains 'Sushi Tu'. The search results show a primary quantity of 3 in 'Case of 3' UOM, a secondary quantity of 36 in 'Pounds' UOM, and a sale price of 2 for a total amount of 72.00. Annotations with callouts identify these fields: 'Primary Quantity and UOM' points to the '3 Case of 3' field, 'Secondary Quantity and UOM' points to the '36 Pounds' field, and 'Priced in Secondary Quantity and UOM' points to the 'Sale Price 2 72.00' field. Below the search bar is an 'Action' menu with a checkmark and an 'x' icon. A dashed line separates the search area from the 'Order Line' table. The table has columns for 'Item', 'Quantity', 'UOM', 'Secondary Quantity', and 'Secondary UOM'. The first row shows 'Sushi Tuna' with a primary quantity of 3 in 'Case of 3' UOM and a secondary quantity of 36 in 'Pounds' UOM. A callout box says 'Item is dual UOM tracked and priced in the secondary UOM.' and another says 'Automatic'. Below the table, there is a 'Priced in Secondary UOM' section with columns for 'Your Price' and 'Amount'. It shows a 'Sale Price' of 2 and an 'Amount' of 72.00. A callout box says 'Calculated from price list' and points to a 'Price List' icon.

Note

- You use the order line to search for the item. It displays the ordered quantity in the ordered UOM, and the secondary quantity in the secondary UOM. It also indicates whether Order Management priced the line in the secondary UOM.
- You can't change the secondary quantity or secondary UOM on the order line, but you can change the primary quantity and Order Management will automatically calculate the secondary quantity and the amount.

Try it:

1. Go to the Order Management work area and create a sales order:

Attribute	Value
Customer	Fancy Fish
Business Unit	Fresh Fish 4 U

2. Search for the Sushi Tuna item on the order line.

The order line sets the unit of measure to the primary, by default. It also displays primary and secondary attributes which makes it easy to see the conversion.

For this example, assume you change the Quantity to 3 and the UOM to Case of 3:

Attribute	Value
Quantity	3 This is the primary quantity.
UOM	Case of 3 The primary UOM is Each. You can change this attribute to any UOM that's in the same class as the primary UOM, such as Case of 3.
Secondary Quantity	36 The order line uses conversion rules that your order administrator sets up to automatically calculate the secondary quantity: <ul style="list-style-type: none"> ○ 1 case contains 3 tuna. ○ 1 tuna equals 4 pounds. ○ 3 tuna multiplied by 4 pounds means each case weighs 12 pounds. ○ 12 pounds for each case multiplied by the primary quantity of 3 equals a secondary quantity of 36.
Secondary UOM	Pounds
Sale Price	2
Line Price	72.00 Its the secondary quantity of 36 pounds multiplied by the unit price of 2 equals 72.00.
Information Icon	Let's you know that the item is a dual UOM item.

3. Click **Add**, then notice that the sales order adds the values that you set on the order line to the order line. Here are a few more details you should take note of:

Attribute	Value
Item	Contains your dual UOM item.

Attribute	Value
Priced in Secondary UOM	Value: <ul style="list-style-type: none"> ○ Selected. Pricing priced the order line according to the value in the Secondary UOM attribute on the order line. In this example, that would be Pounds. ○ Not Selected. Pricing priced the order line according to the value in the UOM attribute on the order line. In this example, that would be Each.

4. Submit.

The orchestration process schedules and reserves the item just like it does any other sales order:

- The orchestration process schedules the order according to the values in the Quantity attribute and the UOM attribute on the order line.
- The secondary unit of measure and the secondary quantity doesn't affect scheduling.

Assume the order number is 525940. Here's a summary of the order line details:

Line	Item	Quantity	UOM	Status	Secondary Quantity	Secondary UOM	Price	Extended Amount	Assessable Value	Shipped Quantity	Secondary Shipped Quantity	Secondary Fulfilled Quantity
1	Sushi Tuna	3	Case of 3	Awaiting Shipping	36	Pounds	\$2	\$72	\$72	empty	empty	empty

Monitor Order Fulfillment

Search on a dual UOM attribute, such as:

- Secondary Fulfilled Quantity
- Secondary Quantity
- Secondary Shipped Quantity
- Secondary UOM
- Priced in Secondary UOM

If Priced in Secondary UOM is:

- **Yes.** The item is a dual UOM item and its priced in the secondary UOM on the order line.
- **No.** The item is a dual UOM item and its priced in the ordered UOM.
- **Empty.** The item isn't a dual UOM item.

If the order line is part of a return, then you can use the Secondary RMA Delivered Quantity attribute on the Manage Return Fulfillment Lines page.

Split a Line

You can split a line that has a dual UOM item just like you split any other line.

Let's say your order line currently has a quantity of 3, you receive a request to expedite shipment for a quantity of 2, so you need to change the shipping method to 2nd day air. Here's what that looks like:

Split Fulfillment Line: 522309 - 1-1

Item Description: The world's tastiest tuna.
 Customer: Computer Service and Rentals
 Customer Registry ID: 1006
 Status: Manual Scheduling Required

Supplier Site
 Shipping Method: DHL Air 2nd da
 Demand Class

Split Lines

Actions View Format + X Freeze Detach Wrap

New Quantity	Warehouse	Supplier	Supplier Site	Shipping Method	Demand Class
1	M1				
2	M1			DHL Air 2r	

Save and Close Cancel

Order Management
 Primary \$
 Dual UOM

Split into two lines

Order Lines ?

Apply Hold Return Show All View Freeze Detach

Adjusted

Item	Quantity	UOM	Secondary Quantity	Secondary UOM	Priced in Secondary UOM	Your Price	Amount
Sushi Tuna	2	Case of 3	24	Pounds	✓	2	48.00
Sushi Tuna	1	Case of 3	12	Pounds	✓	2	24.00

Note

- You start with an order line that has these values:

Attribute	Value
Item	Sushi Tuna
Quantity	3
UOM	Case of 3

Attribute	Value
Secondary Quantity	36
Secondary UOM	Pounds
Priced in Secondary Quantity	Selected
Your Price	2
Amount	72.00

- You split the line into two lines, one with a quantity of 1 and the other with a quantity of 2.
- The split line action proportionally calculates the secondary quantity according to the quantity that you split.
- If Order Management prices the item according to the secondary unit of measure, then it calculates the extended amount on the line proportionally distributed in the ratio in which the secondary quantity was split.
- Here are the revised values on the split lines:

Line	Quantity	Secondary Quantity	Amount
1-1	2	24	48.00
1-2	1	12	24.00

Here's the math:

- **Line 1.** Multiply the Quantity of 2 by the Secondary Quantity 24 equals Amount 48.00
- **Line 2.** Multiply the Quantity of 1 by the Secondary Quantity 24 equals Amount 24.00

For details about how to split a line, see [Split Order Lines](#).

Coverages and Subscriptions

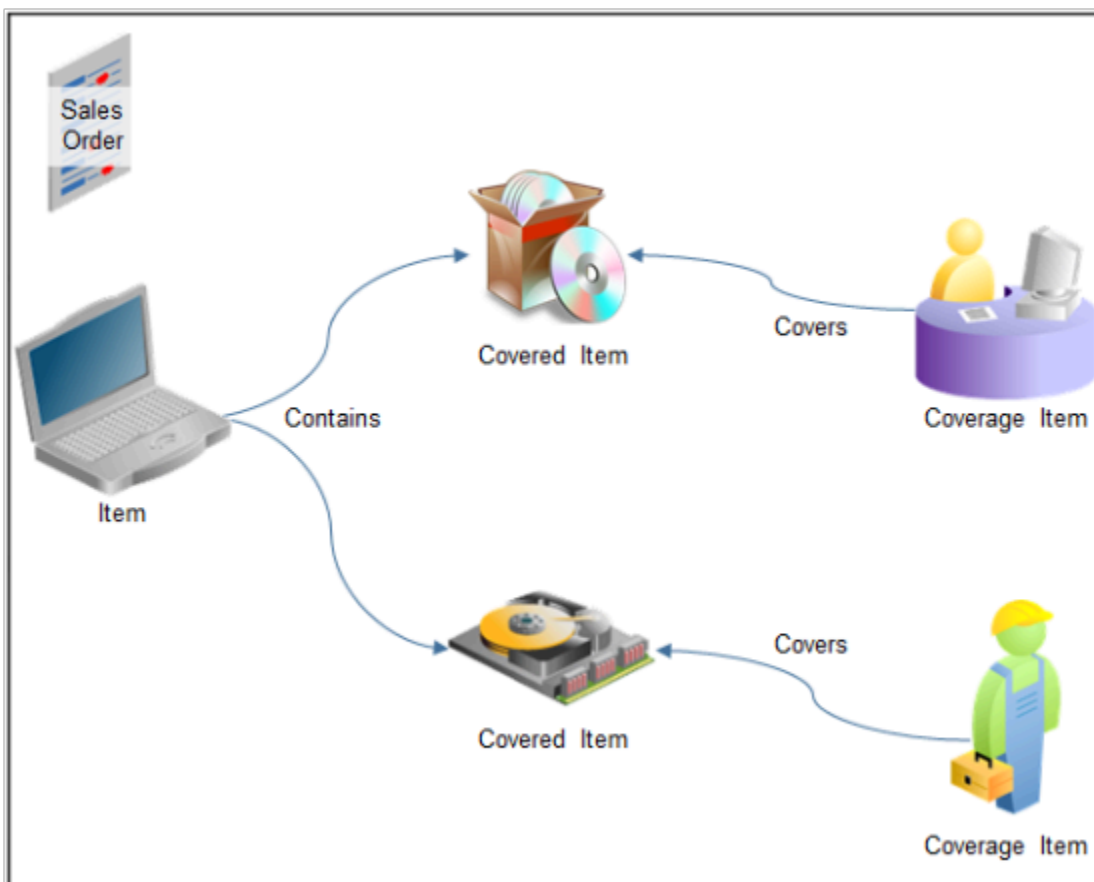
Guidelines for Managing Coverages and Subscriptions

Add a coverage item, such as a warranty, or a subscription, such as a monthly wireless calling plan, to a sales order.

Consider these concepts:

Concept	Description
Covered item	An item that a coverage item covers. For example, a six month warranty is a coverage item for a laptop computer, and the laptop computer is the covered item.
Coverage item	An item that adds value by providing coverage for another item. Extended Warranty, Service Level Agreement, and Software Maintenance are each an example of a coverage.
Coverage	A contract that adds value to an item by providing support, service, repair, replacement, and so on.

For example, your customer might purchase a laptop computer and different types of coverage for the laptop and the software it contains:



Note

Covered Item	Coverage Item
Standard Software Suite	30 Day Online Phone Support
Standard Hard Drive	One Year Parts Warranty, with on site service

For another example, your customer might purchase a five year service agreement as the coverage item for a refrigerator, and the refrigerator is the covered item. You ship the covered item, then a field service technician provides service on the refrigerator, as needed.

You can manage a coverage item:

- Add coverage to a covered item that's in the same sales order.
- Add coverage to a covered item that's in a different, closed sales order.
- Add more than one coverage item to one covered item. For example, add one coverage item that covers parts for a laptop computer, then add another coverage item that covers service for the same laptop computer.
- Modify a coverage item, including billing frequency.
- Cancel a coverage item that Order Management hasn't sent to order fulfillment.
- Return a coverage item that Order Management already fulfilled.

Coverages You Can and Can't Add

Here are the types of coverage you can add:

- Extended Warranty
- Software Maintenance
- Service Level Agreement
- Preventive Maintenance

You can't add these coverages:

- Coverage for an item you can't cover. For example, you can't add preventive maintenance to an extended warranty.
- Coverage for a service that doesn't recur, for installation, or for training.
- Coverage for only part of the quantity on the order line.
- Pricing according to the number of service request calls.
- Order line that includes a coverage item that covers more than one covered item. A coverage line can cover only one covered item.
- Coverage item that covers only part of the coverage duration.
- Coverage item that covers another coverage item.
- Coverage item that's also a configured item.
- Coverage for a configurable option when another coverage item already covers the configured item.
- Coverage item that isn't enabled for contract coverage. Your order administrator enables contract coverage.

Status

A coverages or subscription moves through different statuses during fulfillment just like a regular order line, but with a few differences:

- If the status of the covered order line is Shipped, Invoiced, or Delivered, then you can't revise the coverage line that covers the covered line.
- Order Management sets the status of the coverage item to Awaiting Billing when it fulfills the item that the coverage item covers.

How Status Works with Holds

1. Assume you create a sales order with the AS54888 laptop computer as the covered item, the 1 Year Warranty as the coverage item, then submit the order.
2. Later on, you manually apply a shipping hold on the covered item, then manually release the hold two days later.
3. Order Management moves the laptop to Awaiting Shipping but the warranty is still at the Change Pending status or Manual Scheduling Required status.

You become concerned because Order Management seems to be processing the laptop but not the warranty. Don't worry. This is expected behavior. Order Management starts the billing for the warranty after it fulfills the laptop, starting with the Awaiting Billing status.

Set the Date and Time

You can set the time stamp for the contract start date or end date. The time stamp includes the date and time of day.

:

Attribute You Set	Description
Contract Start Date	Specify when to start the coverage or subscription. If you set the start time stamp, duration, and period, then Order Management automatically sets the end time stamp for you.
Contract End Date	Specify when to end the coverage or subscription. If you set the end time stamp, then Order Management recalculates the duration and period and displays their revised values.

Note

- If you set the start time stamp and the end time stamp, then Order Management automatically sets the duration and period.
- If the duration is:
 - **Fixed.** You can't set the end time stamp. Order Management calculates it for you.
 - **Variable.** You can set the end time stamp.

Your order administrator determines whether the duration is fixed or variable.

Copy Subscriptions

If you use the copy action, and if an order line contains a subscription, then Order Management pairs the order line from the original order to the copy. Assume sales order 12345 has 2 lines:

- Line 1, Credit Card Reader item, quantity 10
- Line 1-1, Credit Card Processing Subscription item, quantity 10, associated to line 1 on order 12345

You create a copy of order 12345, and the copy is order 12346. Sales order 12346 will have:

- Line 1, Credit Card Reader item, quantity 10
- Line 1-1, Credit Card Processing Subscription item, quantity 10, associated to line 1 on order 12346

If you create a copy and the line has a coverage, and if the line references:

- Another sales order, then Order Management copies the reference to the other sales order.
- The same sales order, then Order Management creates a reference to the corresponding line on the same sales order.
- An asset, then Order Management copies the reference to the same asset.

If you use the negotiated rate plan feature, and if you use the copy action, then Order Management also copies the negotiated rate plan.

Related Topics

- [Modify Coverage for Sales Orders](#)
- [Cover Your Configured Items](#)
- [Return Covered Items](#)
- [Add Coverage to Sales Orders](#)
- [Cancel Coverage for Sales Orders](#)

Add Coverage to Sales Orders

Add a coverage item for a covered item in the same sales order, or in a different sales order.

You can add coverage to a new sales order, or to a sales order you already submitted to order fulfillment.

In this example, you add covered item PTO54222 Standard Personal Desktop Computer to a sales order, then add coverage item Variable Extended Warranty for Standard Desktop in the same sales order.

This topic uses example values. You might need different values, depending on your business requirements.

Try it:

1. Go to the Order Management work area, then create a new sales order.

- Complete the order header, then add this item on the order line:

Item	Description
PTO54222	PTO54222 Standard Personal Desktop Computer

The PTO54222 Standard Personal Desktop Computer is the covered item. You must add the covered item before you add the coverage item.

- Search for and add Variable Extended Warranty for Standard Desktop item.
- Click **Select Covered Item**.

The order line displays Select Covered Item only if your search returns a coverage item. If the search doesn't return the coverage item you require, then contact your order administrator.

- Verify your order lines:

Quantity	UOM	Item	Duration	Period	Your Price	Amount
1	Each	PTO54222			Sale Price	500.00
1	Each	Variable Extended Warranty	1	Year	Recurring Charge	100.00

How Order Management Calculates Amounts for Coverage Items

Order Management automatically sets the quantity of the coverage line to the quantity of the covered line. It then multiplies the quantity by the price on the covered line. In this example, the calculation is Quantity of 2 multiplied by price of 100 equals an Amount of 200:

Quantity	UOM	Item	Duration	Period	Your Price	Amount
2	Each	PTO54222			Sale Price	100.00
2	Each	Variable Extended Warranty	1	Year	Recurring Charge	200.00

Set the Duration and Period

Some coverage items might allow you to modify the Duration and Period, depending on how your order administrator sets them up. Assume your customer requests to purchase only one month of Variable Extended Warranty instead of the default 5 years. You can do it on the order line:

Quantity	UOM	Item	Duration	Period	Your Price	Amount
1	Each	PTO54222			Sale Price	500.00

Quantity	UOM	Item	Duration	Period	Your Price	Amount
1	Each	Variable Extended Warranty	1	Month	Recurring Charge	50.00

Note

- If the service duration is variable for the coverage item, and if you set Contract Start Date and Contract End Date, then Order Management automatically calculates Duration.
- If you set Contract Start Date and Contract End Date to the same date, including the time stamp, then Order Management sets Duration to one day. One day is the lowest value that Duration can contain, so a coverage must exist for at least one full day. You can't specify a duration that lasts for less than 24 hours.
- If you copy a sales order, and if the sales order that you copy has a coverage, then Order Management sets Contract Start Date on the new coverage line to the current date. Order Management uses the current date, and the duration and period on the original coverage line to calculate the Contract End Date on the new line.

Add Coverage to Sales Orders You Already Submitted

Add coverage item Gold Extended Warranty to an order line on sales order 123456, which is a sales order you already submitted.

Create the sales order:

1. Go to the Order Management work area, then create a new sales order.
2. On the New Sales Order page, complete the order header, then search for:

Attribute	Value
Description	Warranty

3. In the search results, select **Gold Extended Warranty**, then click **OK**.
4. Click **Select Covered Item**.
The order line displays Select Covered Item only if your search returns a coverage item. If the search doesn't return the coverage item you require, then contact your order administrator.
5. In the Select Covered Item dialog, select **Previous Order**.
6. In the Order Line list, select it, then search for:

Attribute	Value
Order	123456

7. Notice that the search results displays details about the order lines you can cover in sales order 123456. Click one of these **lines**, then click **OK**.
8. In the Select Covered Item dialog, click **Add**.

- In the Order Lines area, notice that the order line includes a reference to the covered item and the number of the sales order that contains the covered item:

Attribute	Value
Item	Gold-Wnty - Gold Extended Warranty Covers CM65827 - Order 123456 - Line 1.2.1 Not Started
Duration	1 Year
Quantity	1
UOM	Ea

- Submit the order.

Modify Coverage for Sales Orders

Modify some parts of a coverage item in a sales order.

If you modify the quantity of the covered order line, then Order Management automatically modifies the quantity of the coverage line.

Assume an order line for the Standard Desktop computer includes a quantity of 2, and coverage line 12345 that covers the computer also includes a quantity of 2 because a separate warranty is required to cover each of the two Standard Desktop computers. If you modify the quantity on the order line for the Standard Desktop from 2 to 1, then Order Management will modify the quantity on coverage line 12345 from 2 to 1.

Split Order Lines

If you split an order line that includes a covered item, then Order Management also splits the coverage item.

Assume you create an order line for the Standard Desktop that includes a quantity of 2, then add one coverage line that includes an Extended Warranty, also with a quantity of 2. If you split the order line for the Standard Desktop into two separate lines, each with a quantity of 1, then Order Management also splits the coverage line into two order lines, one each with a quantity of 1.

If Order Management splits the covered line during fulfillment, then it can add a new coverage item to each of the covered lines that result from the split.

An order import can't add a new coverage to the entire sales order. Assume a sales order includes 10 units of a laptop on a single order line. Order Management splits the order line into order line x with a quantity of six, and order line y with a quantity of four. Order import can't add an extended warranty for 10 units. However, you can split order line x in Order Management, then add six units of the extended warranty.

Related Topics

- [Guidelines for Managing Coverages and Subscriptions](#)
- [Cancel Coverage for Sales Orders](#)
- [Cover Your Configured Items](#)
- [Return Covered Items](#)
- [Add Coverage to Sales Orders](#)

Cancel Coverage for Sales Orders

You can cancel coverage for a sales order that's in Processing status.

- If the sales order is in Closed status or Partially Closed status, then you must return it.
- You can cancel coverage but not return the covered item. For example, a customer might decide to cancel a six month warranty for a laptop computer during the third month of the warranty period, but keep the laptop computer, which is the covered item.
- If you cancel only the coverage item, and don't return the covered item, then Order Management sets the return quantity of the coverage item to the returnable quantity. You can't change this value.
- If Order Management already fulfilled the coverage item, then you must create a separate return order to return it.

In this example, you cancel the coverage item but don't return the covered item.

This topic uses example values. You might need different values, depending on your business requirements.

Cancel coverage for a sales order:

1. Go to the Order Management work area, then search for and open the sales order that has the coverage you must cancel.
2. Create a revision.
3. Find the order line that includes the coverage item you must cancel, cancel it, then submit the order.

Order Management cancels the coverage line, then prorates the portion of the coverage item that the customer didn't use as a credit memo.

Assume the customer purchased a coverage item for a 12 month warranty for \$120. Each month costs \$10. The customer cancels the warranty in the middle of the sixth month of the warranty period. Order Management fulfilled six months of the warranty, so Order Management creates a credit memo in the amount of \$60.

Related Topics

- [Modify Coverage for Sales Orders](#)
- [Guidelines for Managing Coverages and Subscriptions](#)
- [Cancel Sales Orders](#)
- [Return Sales Orders](#)

Return Covered Items

If the sales order is in Closed status or Partially Closed status, then you can return a covered item that the sales order references.

You return a covered item in the same way you return an item that isn't covered. For details, see [Return Sales Orders](#).

Here's what Order Management does when you return a covered item:

- Cancels all coverage items for the covered item, even if the coverage items are on different sales orders.
- Sets the return quantity of the coverage item to the same value as the return quantity of the covered item.
- If you change the return quantity of the covered item, then Order Management also changes the return quantity of the coverage item.
- Refunds the account when it receives the returned item:
 - Order Management uses a credit memo to prorate the portion of the coverage item that the customer didn't use.
 - If the coverage item includes recurring charges, then Oracle Receivables prorates and credits the remaining amount for the current period, then cancels future invoices according to the coverage end date.

Make Complex Cancellations and Returns

You might need to cancel or return more than one coverage item for the same covered item.

Assume the Standard Desktop Computer includes two coverage items:

Sales Order	Order Line	Item	Quantity	Associated Order Line
00001	1	Standard Desktop Computer	10	Not Applicable
00001	1:1	Service Warranty	10	Order 1, line 1
00002	1	Parts Warranty	10	Order 1, line 1

Assume you added the service warranty when you created sales order 00001, but you added the parts warranty sometime later in a separate sales order after Order Management fulfilled the Standard Desktop Computer.

Return Some of the Covered Items

Assume you return a quantity of 2 of the Standard Desktop Computer. The Associated Order Line references the return order so Order Management can process the covered item and the coverage items together:

Return Order	Order Line	Item	Quantity	Associated Order Line	Original Order
00003	1	Standard Desktop Computer	2	Not applicable	Order 1, line 1
00003	2	Service Warranty	2	Order 3 line 1	Order 1, line 1.1
00003	3	Parts Warranty	2	Order 3, line 1	Order 2, line 1

Return the Remaining Part of the Parts Warranty

Some time later, you must return the remaining part of the Parts Warranty coverage. You can use the Order page to locate sales order 00002, then return only order line 1 of sales order 00002:

Item	Quantity to Return	Returnable Quantity	Associated Order Line	Original Order
Parts Warranty	8	8	Order 1, line 1	2

You can't change the quantity to return. You must return the remaining quantity that you haven't already returned.

Here's what the resulting return sales order will look like:

Return Order	Order Line	Item	Quantity	Associated Order Line	Original Order
00004	1	Parts Warranty	8	Order 1, line 1	Order 2, line 1

Associated Order Line references the sales order that originally contained the covered item because sales order 00004 doesn't contain the covered item.

Return More Covered Items

Assume some time later you start a return for a quantity of one more Standard Desktop Computer, and encounter these values in a dialog:

Item	Quantity to Return	Returnable Quantity	Associated Order Line	Original Order
A554888	1	8	Not applicable	1
Service Warranty Covers line 1	Read only	8	Order 1, line 1	1

The dialog doesn't display details about Parts Warranty because you already returned the entire quantity for Parts Warranty.

Here's what the return order will look like:

Return Order	Order Line	Item	Quantity	Associated Order Line	Original Order
00005	1	Standard Desktop Computer	1	Not applicable	Order 1, line 1
00005	2	Service Warranty	2	Order 5, line 1	Order 1, line 1.1

Associated Order Line references the return order so Order Management can process the covered item and the coverage item together.

Related Topics

- [Return Sales Orders](#)
- [Add Configured Items to Order Lines](#)
- [Revise Sales Orders That You Already Submitted](#)
- [Fulfill Configured Items](#)
- [Add Coverage to Sales Orders](#)

Cover Your Configured Items

Add a coverage item to a configured item.

- Add coverage to a configured item in the same way you add coverage to a nonconfigured item. For details, see [Add Coverage to Sales Orders](#).
- Add coverage to each configurable option, depending on how your order administrator sets up coverage for the item.
- If you change coverage for a configured item, then Order Management applies the change to each configurable option that the coverage can cover.
- If you delete a configurable option, and if a coverage item covers the configurable option, then Order Management also deletes the coverage item.
- If you reconfigure a configured item, then Order Management reapplies the coverage. For example, if you add configurable option blue and delete option red, then Order Management adds coverage to blue and deletes coverage from red.
- If you return a configured item, and if a coverage item covers the configured item, then Order Management cancels the coverage item that covers the configured item, and also cancels any coverage items that cover the configurable options.
- You can cancel coverage for a configured item but not return the configured item.

Change Quantity

If you change quantity on the covered order line, then Order Management automatically changes quantity of the coverage line.

Assume an order line for the Standard desktop computer includes a quantity of 2, and coverage line 12345 that covers the computer also includes a quantity of 2 because each of the computers require a separate warranty. If you change the quantity on the Standard Desktop order line from 2 to 1, then Order Management will change the quantity on coverage line 12345 from 2 to 1.

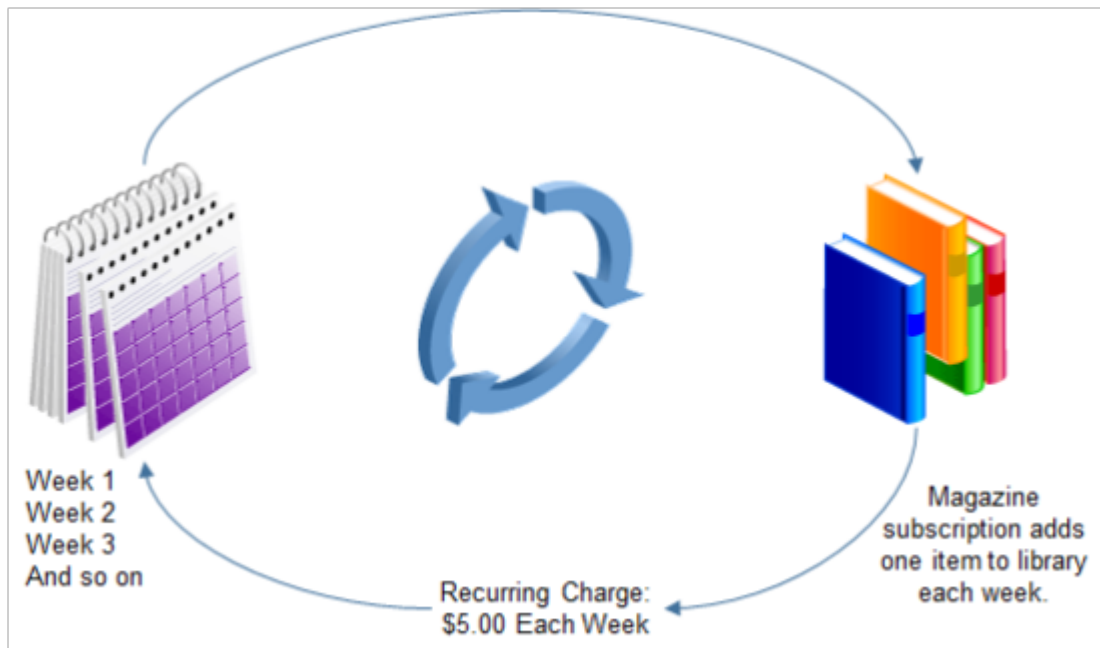
Related Topics

- [Return Covered Items](#)
- [Add Configured Items to Order Lines](#)
- [Revise Sales Orders That You Already Submitted](#)
- [Fulfill Configured Items](#)
- [Add Coverage to Sales Orders](#)

Add Subscriptions to Sales Orders

Add a subscription to a sales order.

- A subscription is an item that recurs:



For example, a one year subscription to a magazine that recurs each week, a 90 day subscription for cell phone service, and a six month subscription for software usage are each an example of a subscription.

- A subscription includes a charge that recurs.
- A coverage item can cover a subscription.
- You can order some subscriptions without including a coverage item that covers the subscription. For example, a coverage item doesn't typically cover a simple weekly magazine subscription.

- You can order some subscriptions as a covered item, then add a coverage item that covers some aspect of the subscription. For example, a subscription to a cloud application is the covered item, and up time is the coverage item.
- You can change, cancel, or return some subscriptions.

Here's an example:

- Your customer needs five subscriptions of the same magazine, one subscription for each person in their department.
- The subscription period lasts for one week and recurs 52 times, resulting in a subscription that lasts for one year.
- The subscription uses a weekly period so the customer can cancel at any time and incur a bill only for the weeks they received the magazine.

This topic uses example values. You might need different values, depending on your business requirements.

Try it:

1. Go to the Order Management work area, then create a new sales order.
2. Complete the order header, then add this order line:

Attribute	Description
Item	Subscription to Visions Magazine
Quantity	<p>Set to 5.</p> <p>Note</p> <ul style="list-style-type: none"> ○ This values sets the number of subscriptions. ○ If you set Quantity to 5, then you're selling five subscriptions to Visions Magazine. ○ Quantity doesn't affect UOM. For example, if you set Quantity to 5, and if UOM is Week, then you aren't specifying 5 weeks.
UOM	Set the time period. The values you can select depends on how your order administrator sets up the subscription. This example uses a Fixed subscription, so you can't change the UOM.
Contract Start Date	Select when to start the subscription.
Contract End Date	As an option, select when to end the subscription.
Billing Frequency	<p>A subscription can bill one time or it can recur.</p> <p>Assume your customer orders a subscription for one software license for 100 users with a three year duration. You can bill the customer one time for the entire purchase, depending on how your order administrator sets up the subscription.</p>

Attribute	Description

Make sure your order line attributes have these values:

Attribute	Value
Quantity	5
UOM	Week
Item	Subscription for Visions Magazine
Duration	52
Period	Week
Your Price	5.00
Amount	25.00
Extended Amount for Duration	1,300.00
Contract Start Date	3/13/17
Contract End Date	Empty
Billing Frequency	One Time Billing
Number of Billing Periods	1

3. Click **Submit > OK.**

Order Management calculates the subscription:

- Quantity of 5 multiplied by Your Price of 5 multiplied by Duration of 52 equals \$1300.

Note

- You have one order line for the covered item and one order line for the coverage item, and it includes attributes that are specific to the coverage item, such as Duration, Period, Contract Start Date, Contract End Date, and Sales Product Type.
- Fulfillment for a subscription can recur. For example, a weekly magazine fulfills one time each week.
- Associated Order Line links to the item that the coverage item covers.

Related Topics

- [Create Sales Orders](#)
- [Guidelines for Managing Coverages and Subscriptions](#)
- [Recurring Charges on Order Lines](#)

Inventory

Manage Sales Orders That Have Inventory Transactions

You can use the Order Management work area to create a sales order that has an inventory transaction.

1. Go to the Order Management work area, create a sales order and set the values on the order header.
2. Set the values on the order line:

Attribute	Value
Allow Inventory Transaction	Yes This setting helps to reduce inventory when you don't pick or ship the item. Use it for standard items that are shippable. A standard item is any item that isn't a configured item or kit.
Warehouse	You must set a value for each of these attributes. If you don't, and if you set Allow Inventory Transaction to Yes, then you will receive an error when you submit.
Subinventory	

3. If a revision, lot, or serial controls the item on the order line, or if a locator controls the subinventory, then set a value for the Quantity, Revision Number, Lot, From Serial Number, or Locator attributes on the order line. The values that you set depends on what controls the item. For example, if a lot controls the item, then set a value in the Lot attribute.
4. Submit.
5. Click **Manage Orders**, then use a fulfillment view to monitor the Sent to Inventory attribute on your sales order to determine whether Order Management sent the order line to inventory.

Related Topics

- [Reduce Inventory When a Sales Order Doesn't Pick or Ship](#)
- [Guidelines for Reducing Inventory](#)
- [Reduce Inventory Without Picking or Shipping](#)
- [Considerations for Creating Material Statuses](#)
- [Considerations for Creating Subinventories and Locators](#)

Manage Transactions That Reduce Inventory

Use Inventory Management and other work areas to manage transactions that reduce inventory after you submit the sales order that has the transaction to fulfillment.

Review Transactions That Are Done

Let's say you need to review transactions for sales order 76854:

1. Make sure you have the privileges that you need to review and manage transactions.
For details, see *Overview of Tasks from the Inventory Management Work Area*.
2. Go to the Inventory Management work area.
3. Click **Tasks > Review Completed Transactions**.
4. On the Review Completed Transactions page, search for the values:

Attribute	Value
Source Type	Sales Order
Source Reference	76854

5. In the search results, notice the value:

Attribute	Value
Transaction Type	Direct Sales Order Issue Inventory Management uses this transaction type to create the inventory transaction for the sales order.

6. Examine the item, transaction quantity, transaction date, revision, lot, serial, project, and task details for the transaction.
7. Click **Done**.

Review Transactions That Are In Error

1. Click **Tasks > Manage Pending Transactions**.
2. On the View Pending Transactions page, search for the values:

Attribute	Value
Source Type	Sales Order
Source Reference	76854
Transaction Type	Direct Sales Order Issue

3. In the search results, examine the Error Explanation attribute to get details about the error:

- The page displays errors that happen when Inventory Management uses the Direct Sales Order Issue transaction type.
- You can modify the subinventory, locator, lot, or serial for a transaction to process it from a pending transaction.

If you specify a project on the order line, and if on-hand inventory isn't available for the item for the project and task, then the inventory transaction for the sales order will get stuck on the Manage Pending Transactions page in Inventory Management. You can use the Pending Transactions page to fix the error:

- Adjust the cycle count to fix your project inventory.
- Or use common inventory. Set the Allow Use of Common Supplies attribute for the item organization that the item references to Yes or leave it empty. Remove the Inventory project and task from the stuck transaction, and Inventory Management will use common inventory to fulfill the demand.

Examine Costs in Cost Management

1. Make sure you have the privileges that you need to review cost accounting distributions.

For details, see [Overview of Cost Accounting](#).

2. Go to the Cost Accounting work area.
3. Click **Tasks > Review Cost Accounting Distributions**.
4. On the Review Cost Accounting Distributions page, search for the values:

Attribute	Value
Source Reference	76854
Transaction Type	Direct Sales Order Issue

5. In the search results, examine the distributions for your transaction:
 - Oracle Cost Accounting recognizes the cost of goods sold to the same level that Oracle Receivables or Oracle Revenue Management recognizes revenue.
 - If your orchestration process doesn't have a billing task, then the orchestration process proceeds to close the order line, orchestration sends the order details to Cost Accounting, and Cost Accounting uses a revenue recognition event.

Here's the accounting template that the Direct Sales Order Issue transaction type uses:

Accounting Line Type	Debit	Credit
Deferred Cost of Goods Sold	X	-
Inventory Valuation	-	X

Accounting Line Type	Debit	Credit

Here's the accounting template for Cost of Goods Sold Recognition:

Accounting Line Type	Debit	Credit
Cost of Goods Sold	X	-
Deferred Cost of Goods Sold	-	X

Start the Financial Orchestration Flow

If your transaction includes a change of ownership between business units, then you must run the scheduled process that starts the financial orchestration flow:

1. Go to the Scheduled Processes work area, then click **Actions > Schedule New Process**.
2. In the Schedule New Process dialog, set the value:

Attribute	Value
Process Name	<i>Submit Financial Orchestration Events</i>

3. In the dialog that displays, set the value, then submit:

Attribute	Value
Process Direct Sales Order Issues	Yes Financial Orchestration will process the inventory transactions and orchestrate the financial flow.

Note

- o Financial Orchestration processes the transaction when ownership changes from one business unit to another business unit. If your business doesn't include an ownership change for a Direct Sales Order Issue, then you don't need to run this scheduled process.
- o Financial Orchestration orchestrates financial details for each Direct Sales Order Issue transaction type.
- o To view the status of the transaction, go to the Monitor Financial Orchestration page, then set the Business Process Type attribute to Shipment.

For details, see [Overview of Supply Chain Financial Orchestration](#).

Failure

If the event status never finishes because a failure happens in Financial Orchestration, then run the scheduled process on a schedule:

1. Set the attributes:

Attribute	Value
Business Process Type	Shipment Financial Orchestration considers a Direct Sales Order Issue transaction type as a Shipment transaction.
Process Direct Sales Order Issues	No

2. Click Schedule, then set it up to run on a schedule, such as one time every hour.

Related Topics

- [Overview of Cost Accounting](#)
- [Overview of Supply Chain Financial Orchestration](#)
- [Inventory Management Work Area](#)
- [Reduce Inventory When a Sales Order Doesn't Pick or Ship](#)

Import

Manage Imported Sales Orders

Some organizations import source orders from another ordering system into the Order Management work area. You can manage these imported orders in the same way you manage a sales order that you create in Order Management.

- Order Management handles an imported order in the same way it handles an order you create in the Order Management work area.
- You can edit an imported order, then submit it.
- You can't export a sales order to the source system.
- Order Management doesn't update the source system with modifications it makes to the sales order. However, the source system can request details about order status.
- If you import a revision, and if the revision contains a new value for an attribute, then the import replaces the old value with the new value. For example, if the original order contains a Quantity of 5 and the import contains a Quantity of 6, then the import replaces 5 with 6.

The order title displays details about the source order. For example:

- Source Order BAT-ALOP-0005-1418288641111- LEG | Currency = US Dollar

where

- **BAT-ALOP-0005-1418288641111** is the source order number.
- **LEG** is the name of the source system. For example, LEG is an abbreviation for the term legacy. Some organizations use the phrase **legacy system** to describe an older ordering system that they're replacing with a newer one.
- **Currency = US Dollar** identifies the currency that the source order uses. Order Management uses currency so it can interpret pricing values.
- If the source order includes a revision number, then Order Management also displays it.

You can identify the source system for a sales order:

1. Open your sales order, then click Additional Order Details.
2. In the General section, examine the value in the Source Order System attribute.

Related Topics

- [Create Sales Orders](#)
- [How Order Management Converts Source Orders Into Sales Orders](#)

More

Manage Other Behavior on Sales Orders

Get details about actions and attributes that aren't described elsewhere in Using Order Management.

Edit Currency Details

You can edit currency details to override the currency on the sales order's header and to set the conversion to use for accounting:

- Your order administrator determines the currency's default value and the values that you can set when you edit currency details. Contact your administrator for details.
- If you set the Type attribute to User, then set the Rate attribute and the Date attribute.
- You can't edit currency details after you submit the sales order.

Manage the Selling Profit Center

Your order administrator might set up the Order Management work area so you can set the Selling Profit Center attribute on an order line that's different from the business unit on the order header:

- Sell items that belong to more than one profit center in a single sales order.
- You have more than one tax registration across regions, such as across states in the United States. Your order administrator might set up taxing according to the Selling Profit Center. Ask your order administrator for details.

Override Values

You can override values on various pages and tabs of the Order Management work area:

- If your override results in an attribute value on the order line that's different from the value for the same attribute on the order header or some other tab, then Order Management adds a blue dot on the line to indicate the difference.
- If you then change the attribute value on the order header or other tab, then Order Management doesn't copy your change to the line that has the blue dot.

Monitor Line Status

The Line Status attribute might not match the item you searched for.

If you query the user request number and status to get the results of a mass action, then the results might be different than what you expect because Order Management might not have finished the mass action for every order line.

For example, if you search for user request number 123 and the Completed user request, then the search results display the completed order lines, but the order line's Line Status attribute might indicate that Order Management is still processing another user request for that line.

For more, see [How Order Management Processes Change Orders](#) and [How Order Management Fulfills Order Lines](#).

Watch the Watchlist

You might not be able to see some of the items on your Watchlist because of your Watchlist preferences. These preferences also apply to saved searches that you're using as Watchlist items.

To review your preferences, select your user name or image in the global header, then go to **Personalization > Set Preferences > Watchlist**.

Here are some other possibilities:

- You deselected saved searches in the Manage Watchlist dialog, so they're no longer used as Watchlist items.
- You deleted saved searches that were used as Watchlist items.
- Your administrator disabled specific predefined Watchlist items or categories for all users.
- Your administrator disabled using saved searches from specific pages as Watchlist items.
- Your administrator removed access to tasks or pages that used to be available to you.

In these cases, you can no longer see the Watchlist items in your Watchlist or in your Watchlist preferences.

Apply Manual Adjustments

Apply manual price adjustments on order lines across sales orders or within a single order. Use this feature on the Sales Order Lines page or the Order page that you use to create and manage sales orders in the Order Management work area, or through REST API:

- Apply an adjustment on one or more charges across order lines in a single request. You can apply a one-time, recurring, or usage charge.
- Use different adjustment types to apply an adjustment on all types of items. You can apply an adjustment on the list price or the net price for a percent adjustment.
- As an option, use the Effectivity attribute to apply an adjustment on a subscription's or coverage's usage or recurring charge for a specific period of time. You must enable the subscription feature.

- Use a filter to search order lines that have a manual price adjustment.

You must set up these features:

- *Redwood: Search and Apply Actions on Multiple Sales Orders*
- *Redwood: Create and Manage Sales Orders*

As an option, set up a business rule that sets the default value for each of these attributes on the Add Manual Price Adjustment dialog:

- Type
- Basis
- Effectivity
- Comments

You can also make the Effectivity attribute and the Comments attribute required, or you can hide them. Order Management displays them as optional, by default.

Use Visual Builder Studio to set up the business rule:

1. Go to the Sales Order Lines page or Order page.
2. Click **Settings and Actions > Edit Page in Visual Builder Studio > Configure Fields and Regions** .

As an option, set up a profile option that sets the default value for the Reason attribute on the Add Manual Price Adjustment dialog:

1. Go to **Home > My Enterprise > Setup and Maintenance > Manage Administrator Profile Values** .
2. Search for the ORA_FOM_DEFAULT_ADJ_REASON profile.
3. Set this value:

Profile Level	Product Name	User Name	Profile Value
Site			Price Match

You can also specify a value for the user name, as needed.

You can use these adjustment types:

- Discount percent
- Discount amount
- Markup percent
- Markup amount
- Price override

You can use these values for effectivity attributes to apply adjustments on a recurring or usage charge for a coverage or subscription:

Attribute Value	For Example, Apply Discount on Monthly Rental of Data Plan For
First Periods	The first 3 months.

Attribute Value	For Example, Apply Discount on Monthly Rental of Data Plan For
Last Periods	The last 6 months.
Specific Periods	The second through to sixth month.
First Full Periods	The first 3 full months.
All Term. This is the default.	All months.

More:

- You can use the Sales Order Action Requests REST API to apply a manual adjustment on a large volume of order lines across sales orders.
- If you attempt to apply the adjustment on two or more lines for a sales order on the Sales Order Lines page, and if Order Management can't apply that adjustment on at least one line for some reason, then it won't apply the adjustment on any line.
- If you attempt to apply a adjustment on two or more order lines on the Order page, then the adjustment might apply on some lines but fail on others. Order Management will display an error message for the failed lines. You can submit the sales order to process the successful updates.
- You can apply an adjustment on order lines only if Oracle Pricing prices the order.

You can't apply a manual price adjustment on:

- A line on a sales order that already has a revision that's in Draft status. You must discard that revision, and then apply the adjustment on the line.
- An included item, option class, or optional item in a configured item or kit. You must apply the adjustment on the configured item or the kit. If the optional item is eligible for an adjustment, then Order Management will apply that same adjustment on the item.
- A transfer order.

For more, go to [REST API for Oracle Supply Chain Management Cloud](#), then expand:

- [Order Management > Sales Order Action Requests](#)
- [Use Cases > Order Management](#)

See [Redwood: Apply Manual Price Adjustment on Multiple Order Lines](#).

Related Topics

- [Manage Sales Credits for Sales Orders](#)
- [How Order Management Converts Source Orders Into Sales Orders](#)
- [Overview of Managing Sales Orders](#)

3 Manage Order Lines

Edit Price on Order Lines

Modify how Order Management calculates the Amount attribute on an order line.

Make adjustments depending on how your order administrator sets up Order Management:

- Adjust unit net price for each charge on an item.
- Apply a value discount or value markup.
- Apply a percent discount or percent markup.
- Enter a price override that sets a new value for net price.

Assume:

- One of your preferred customers, Computer Service and Rentals, is placing a sales order for the AS54888 desktop computer.
- Your company provides Computer Service and Rentals with a \$50 discount for any desktop computer they purchase.
- You are currently offering a year-end, 10% discount off the list price for each purchase.

You will use a manual price adjustment to apply each discount.

This topic uses example values. You might need different values, depending on your business requirements.

Edit price on order lines:

1. Sign into Order Management with the Update Order Pricing Details privilege.
You must use this privilege to do this procedure.
2. Create a new or open your sales order in the Order Management work area.
3. Add an order line, then click the **value** in the Amount column.
You can edit price only if your order administrator sets up pricing to allow you to adjust price.
4. Set these values, then click **Apply**:

Attribute	Value
Type	Discount Amount
Amount	50
Reason	Sales Negotiation Use the Reason attribute to document the reason for the adjustment. It doesn't affect the price.

- Notice that the Charge Breakdown displays the discount amount as a manual adjustment, and that the order line's Amount attribute displays the adjusted value.

Set Adjustment Type

Here are some examples of the adjustments that you can make:

Adjustment Type	Description
Discount Amount	Decrease price by \$50.
Discount Percent	Decrease price by 10% of adjustment basis.
Markup Amount	Increase price by \$50.
Markup Percent	Increase price by 10% of adjustment basis.
Price Override	Set net price to 425.

Sequence More Than One Adjustment

Order Management calculates adjustments in the same sequence that it displays them. If you add more than one adjustment, then the sequence might affect price.

Assume you add these adjustments:

	Type	Amount	Basis	Reason	Adjustment
1	Discount Percent	10	Your Price	Other	-25.00
2	Discount Amount	10		Other	-10.00

The page also displays these values:

Attribute	Value
List Price	250
Automatic Adjustments	0
Manual Adjustments	-35
Net Price	215

Order Management uses this sequence to calculate price:

Step	Description	Math
1	Calculate percent discount.	10% multiplied by \$250 List Price equals \$25 discount.
2	Subtract percent discount.	\$250 minus \$25 equals \$225 Net Price.
3	Subtract amount discount.	\$225 Net Price minus \$10 equals final Net Price of \$215.

Assume you click and drag the discount amount to the top:

Type	Amount	Basis	Reason	Adjustment
Discount Amount	10		Other	-10.00
Discount Percent	10	Your Price	Other	-25.00

The page will display these values:

Attribute	Value
List Price	250
Automatic Adjustments	0
Manual Adjustments	-34
Net Price	216

Order Management uses this sequence to calculate price:

Step	Description	Math
1	Subtract amount discount.	\$250 minus \$10 equals \$240 Net Price.
2	Calculate 10% discount.	10% multiplied by \$240 Net Price equals \$24 discount.
3	Calculate final Net Price.	\$240 minus \$24 equals \$216.

Related Topics

- [Create Sales Orders](#)

Edit Tax on Order Lines

Modify tax details and apply them on an order line.

1. Go to the Order Management work area and create a new sales order.
2. Select a value in the Customer attribute, such as Computer Service and Rentals.

You must set the Customer. It affects pricing.

3. Add an item to an order line, then set a value in a tax attribute.
4. Edit other values, as necessary.

Note

- Your sales order doesn't calculate tax when you add an item to an order line or override a price. Instead, it calculates tax only after you do one of these actions:
 - Save.
 - Submit.
 - Modify the shipping method.
- Some actions might result in a change to the tax details that you can view. Assume the sales order lists a new warehouse, and the warehouse uses tax details that are different from the tax details that the previous warehouse used. Your order administrator might constrain the changes you can make that affect tax values.

Edit Tax Attributes

Attribute	Description
Taxation Country	Select the country that will collect tax for this sales order. This is typically the country where your customer receives the item.
First-Party Tax Registration Number	Defaults to the tax registration number that your order administrator sets up for the legal reporting unit. This unit is associated with the customer that you select in the Customer attribute: <ul style="list-style-type: none"> • Tax registration includes details about the tax obligation that your customer incurs from the tax authority that resides in the tax jurisdiction where your customer receives the item. • Registering the details of a business with the tax authorities is an important legal requirement in many countries. • You can assign a unique tax registration number to the organization that registers with the tax authority. The tax authority use it to reference and track tax implications for the organization. • A tax document, such as an invoice or tax return, typically references a registration number that identifies the organization involved in the transaction.
Transaction Business Category	Choose the business classification that Order Management must use to identify and categorize a transaction into a tax transaction.
User-Defined Fiscal Classification	Specify other classifications that determine how to report tax for a transaction.

Attribute	Description
Document Fiscal Classification	Specify the classification that your tax authority uses to categorize a document that's associated with a transaction for a tax.
Assessable Value	Enter a value that your taxing authority will use to tax the item.

To get details, go to [Implementing Tax](#), then search for the attribute on the Implementing Tax page. For example, search for Transaction Business Category, then examine the search results.

Edit Tax Exemption Attributes

Attribute	Description
<ul style="list-style-type: none"> Tax Exemption Tax Exemption Certificate Number 	Specify a full or partial exclusion from taxes.
Product Category	Classify a noninventory category that your organization uses to determine tax or to report tax.
Product Fiscal Classification	Classify the item so a tax authority can categorize the item for a tax.

To get details, go to [Implementing Tax](#), then search for the attribute on the Implementing Tax page. For example, search for Product Fiscal Classification, then examine the search results.

Update Defaults for Tax Classification Codes

If you add an item to an order line but don't select the warehouse on that line, then Order Management will apply the default Tax Classification Code that you have set up for the item in the Item Validation Organization order management parameter. If you save the order and then select the warehouse at some future time, then Order Management will continue to use the default value for the old warehouse even if you save or reprice the order.

Order Management applies this behavior when any of these attributes contain a value:

- Product Type
- Product Fiscal Classification
- Intended Use Classification
- Product Category

For background, see [Use Item Validation Organizations with Order Management](#).

Related Topics

- [Create Sales Orders](#)
- [Transaction Business Categories](#)
- [User-Defined Fiscal Classifications](#)
- [Document Fiscal Classifications](#)
- [Tax Exemptions](#)

Recurring Charges on Order Lines

If you add an order line that includes a recurring charge, then Order Management displays text, such as per Month on the order line to indicate the charge.

Here's an example that includes a charge of \$1,200.00 that recurs one time every month:

- 1,200.00 per Month

Note

- A recurring charge is a type of billing where charges and quantities repeat over time. For example, a monthly subscription for an online service.
- If an order line includes a recurring charge, then Order Management sums only the one-time charges on the line. It doesn't include the recurring charge in the Amount attribute of the order line.
- If an order line includes only a recurring charge, then Order Management displays a value of 0 in Amount.
- A recurring charge happens in a specific time period, but the total includes only the amount that's currently due. The time period might happen after the date when the amount is due.

Related Topics

- [Create Sales Orders](#)
- [Edit Recurring Billing](#)
- [Add Subscriptions to Sales Orders](#)

Set Receivables Transaction Type for Reverse Billing

If you change pricing on the order line, then make sure the value in the Receivables Transaction Type attribute supports your change.

With most order lines, the price contains a positive value when the Line Type is Buy and a negative value when Line Type is Return, so you don't need to adjust Receivables Transaction Type.

But in some situations, you might need to set the price to a negative value for a buy and a positive value for a return. If you do this, you need to make sure you set Receivables Transaction Type so invoicing reverses the billing.

Order Management sets Receivables Transaction Type to Invoice for a buy and Credit Memo for a return by default regardless of the amount that you enter. Here's what you need to do:

If	Then Set Receivables Transaction Type To
Your Price is negative and its a buy line	Credit Memo
Your Price is positive and its a return line	Invoice

To set the receivables transaction type, display the Receivables Transaction Type attribute on the order line, then set its value.

Related Topics

- [Create Sales Orders](#)
- [Shipment and Billing Details](#)

Add Configured Items to Order Lines

Select options from a list of options for a configured item.

Here's an example of a configured item and how you add one to your sales order:

Order 522164

Submit Order

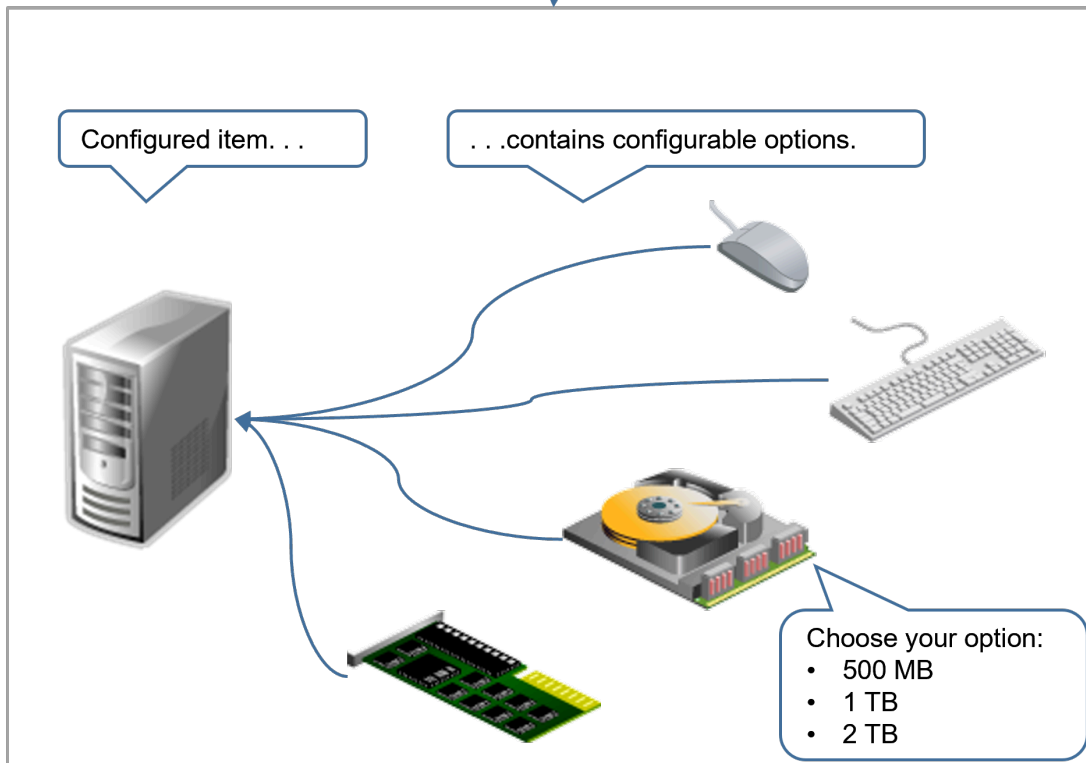
Draft Last updated 3 minutes ago

Business Unit Vision Operations
Customer Computer Service and Rentals
Order Total 180.0 >

Business Unit
Vision Operations

Customer
Computer Service and Rentals

<input type="checkbox"/>	Line	Item	Quantity	Structure	Configuration Item	UOM
<input type="checkbox"/>	1	Build My Laptop	1	✖	CTO_474000-101	Each



Concept	Description
Configured item	An item that includes one or more configurable options that you can configure.

Concept	Description
	A desktop computer where you select the keyboard, mouse, hard drive, and video card is an example of a configured item.
Configurable option	<p>A child component of a configured item.</p> <p>The keyboard, mouse, hard drive, and video card are each an example of a configurable option.</p> <p>You select the value for a configurable option from a list of available options. For example, here's some values you could select for the hard drive option:</p> <ul style="list-style-type: none"> • 500 MB Hard Drive • 1 TB Hard Drive • 2 TB Hard Drive

For another example, assume your company sells wireless telephone services. Use Order Management to make sure the services that you add to a wireless service plan work together correctly, such as international service, international texting, and high-speed data access.

Add a configured item to an order line:

1. Search for the CN62441C Create Your Own Standard System on the order line.

If your search returns a configured item, then the order line displays the structure icon.

2. Click the structure icon, then set configurable options.

Note

- Order Management makes sure the options that you add to the computer work correctly with one another, such as the type of hard drive, how much memory you can add, the software you can include, and the type of wireless hardware you can include.
- Order Management enforces constraints while you configure the item.
- You might not be able to change the quantity for some options, depending on how your order administrator sets up the configured item.

For example, if the configured item is a laptop computer, and if the computer can accommodate only one hard drive, then your order administrator might set it up so you can add only a single hard drive.

For details about the configurable options that you can select, ask your order administrator.

Edit Tax Attributes

You can apply tax attributes to only the root parent, only the child components, or to the root parent and the children.

Assume you have a configured item with this hierarchy.

```
AS54888 Computer
  Tower
  Monitor
  Casing
  LCD Panel
  Keyboard
  Mouse
```

Note

- The AS54888 Computer is the root parent.
- The tower, monitor, keyboard, and mouse are child components of the AS54888.
- The casing and LCD panel are children of the monitor.

Cascade Tax Attributes to Children

Assume you normally include tax for the AS54888, but for this line you need to remove tax from the root parent and from the children. For example, you're selling to a tax exempt nonprofit organization or to a government agency.

Try it.

1. Add the AS54888 Computer configured item to a sales order.
2. Set the Tax Exemption attribute to E on the order line.

Order Management will automatically set the Tax Exemption attribute to E for the AS54888, tower, monitor, casing, LCD panel, keyboard, and mouse.

Don't Cascade Tax Values to Children

Assume you need to modify a tax attribute on the AS54888 root parent, but you don't want to cascade that modification to the child components.

Try it.

1. Add the AS54888 Computer configured item to a sales order.
2. Modify a tax attribute.

Related Topics

- [Create Sales Orders](#)

Manage Attachments on Order Lines

Attach details to an order line, such as a file, URL, or text.

For example, attach a document file that includes requirements for manufacturing, text that describes how to negotiate a price, or a URL to a web page that describes how to assemble an item.

Order Management:

- Can accept an attachment as part of a source order.
- Can't accept an attachment from a fulfillment system.
- Can't send an attachment to a source system.

Manage an attachment for an order line:

1. Create a new sales order then add a value in the Customer attribute.
2. Search for an item on the order line and click **Apply**.
3. Click the paperclip in the Attachments attribute on the order line and attach your details.

Related Topics

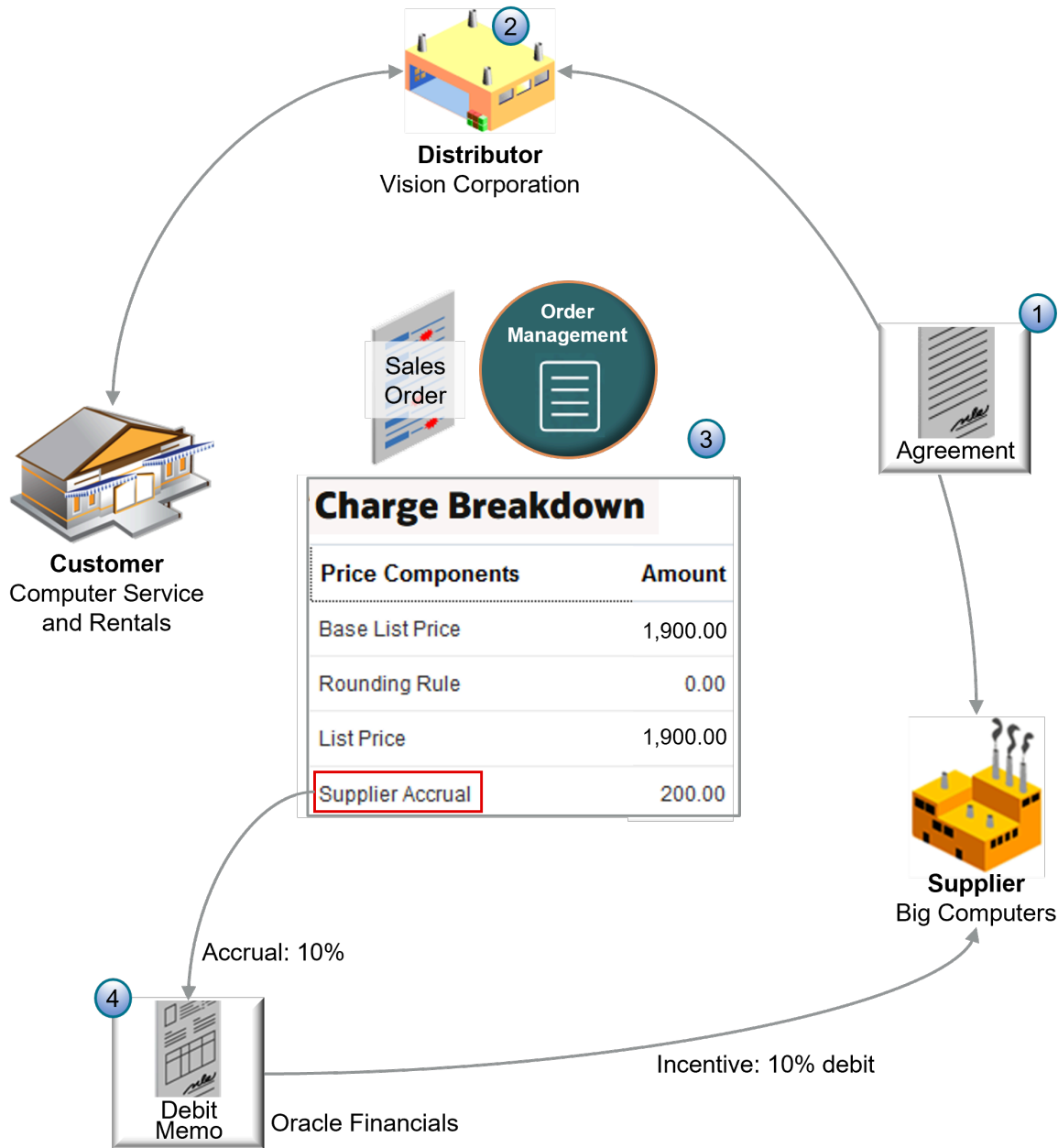
- [Create Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)

Manage Channel Programs on Sales Orders

Order Management automatically applies supplier programs to each order line that's eligible to participate in the program, depending on how your order administrator sets up Order Management.

- Order Management applies the supplier program each time you change the Customer attribute, or save, reprice, or submit the sales order. It also applies the program each time you add an order line or modify the quantity or UOM on the order line.
- You can manually add an eligible program to the line depending on the program type. Pricing calculates the resulting supplier accruals, then Order Management includes them in the charge breakdown on the order line.
- If the program type allows you to decline the program, then you can decline it on the order line.

Assume you work for Vision Corporation, a distributor who sells the AS54888 desktop computer to your customer Computer Service and Rentals. Big Computers, your supplier, offers the latest model of the AS54888 in January 2020 at \$2,000 each. You purchase 100 of them, and sell one to Computer Service and Rentals at a price of \$2,100:



Note

1. A year later, in January 2021, Big Computers has a newer, more powerful model available, the AS6000, which they offer to you at \$2,000 each, which is the same price you paid for the AS54888 a year earlier:
 - o In turn, you drop the price that you charge Computer Service and Rentals for the AS54888 that you still have in inventory to \$1,900.
 - o Vision Corporation needs to recoup the amount it paid Big Computers when it bought the AS54888 in January 2020, so Vision Corporation reaches an agreement with Big Computers where Big Computers

agrees to compensate Vision Corporation for the \$200 drop in price that it now charges Computer Service and Rentals.

- Your order administrator sets up the agreement as a supplier program in the Channel Revenue Management application.
 - The supplier program specifies the incentives and terms of engagement between you and your supplier. For example, it specifies the incentive, the item that's eligible for the program, when its eligible according to the requested ship date or ordered date, the unit of measure, and other factors. You can decline or add supplier programs on the order line, depending on how your order administrator sets them up.
2. You sell one AS54888 to Computer Service and Rentals for \$1,900.
 3. Pricing calculates a \$200 supplier accrual according to terms in Channel Revenue Management. Order Management displays this value in the charge breakdown on the order line. The accrual doesn't affect the price that Computer Service and Rentals pays.
 4. Order Management fulfills the order, Channel Revenue Management tracks the change, and Oracle Financials sends a debit memo to Big Computers so Vision Corporation can recover the \$200.

For details, see *Channel Flows: Buy Side vs Sell Side*.

Manage an Incentive on an Order Line

Assume you must remove an automatic incentive and manually add another:

1. Check with your order administrator to determine whether you're authorized to manage incentives. If you aren't authorized, then you can view incentives but not modify them.
2. Create a sales order, then add an item to an order line.
3. On the order line, click **Actions > Manage Incentives**:
 - Use the Actions menu on the order line. Don't use the Actions menu that's above the order line.
 - The Incentives dialog displays. Notice that the dialog displays any automatic incentives that your order administrator has set up. You can leave them or click Remove to remove them.
4. Click **Add Incentives**.
5. Set the values, then click **OK**:

Attribute	Description
Program Type	Identifies the type of channel program that you're applying.
Program Name	Name of the channel program from the order line.
Program Line	Indicates whether Order Management applies the program to one item, or to all items.
Program Details	Describes the discount type and discount value that Order Management applies to the item: <ul style="list-style-type: none"> ○ Discount ○ Percent ○ New cost
Apply Type	System Applied means Order Management automatically applied the program.

Attribute	Description
	User Applied means a user used the Order Management work area to apply the program.
Decline Reason	You can decline a program. If you do, as an option, enter details that describe why you're declining.
Action	Click a value: <ul style="list-style-type: none"> ○ Apply ○ Decline

6. On the order line, in the Amount column, click the **amount**.
7. In the Line dialog, notice the lines that Order Management added for the incentive, such as Supplier Accrual of 200 USD for Vision Incentives. Order Management displays incentive amounts on the charge breakdown for the order line but not the order header.

Configured Items and Kits

You manage incentives for a configured item or kit slightly differently than you do for an item that isn't configured.

Assume you must manage incentives for the CN62441C configured item:

1. Create a sales order.
2. Add the CN62441C configured item to an order line.
3. On the order line, in the Item column, click **More**.
4. On the Components page, in the Amount column, click **Actions > Manage Incentives**.
5. In the Manage Incentives dialog, set your values, then click **Done**.

Note

- Order Management automatically applies eligible incentives to the parent and each child of a configured item or kit when you add the parent to the sales order.
- You can manually apply an incentive to parent or child.
- Order Management doesn't cascade incentives from parent to child regardless of whether it automatically adds incentives or you manually add them. Instead, Order Management considers each individual child separately.
- Order Management doesn't apply incentives to option classes, or to included items that are part of an assemble-to-order or pick-to-order configured item, or part of a kit.

Return Orders

Here is the behavior when you create a referenced return:

- If the order line has an incentive, then Order Management copies the incentive to the return line and reverses the incentive. Order Management applies this behavior for automatic incentives and manual incentives.
- Order Management doesn't automatically apply new incentive programs that your order administrator added since you created the original sales order.
- You can view an incentive on a referenced return, but you can't change it.

- If you have the correct privilege, then you can manually add or remove an incentive on an unreferenced return line. For details, see [Return Items Without Original Sales Order](#).

If the return line doesn't reference the original order, then Order Management automatically applies the incentive that your order administrator has set up, then reverses the sign.

Revise and Copy

If you revise a sales order, and if the line has shipped, is awaiting billing, canceled, or closed, then you can't revise an incentive on the order line.

If you copy a sales order that has an incentive, then:

- Order Management doesn't copy the incentive to the new sales order. Instead, it automatically applies any incentive that's currently eligible for the line.
- You can't enable the Freeze Pricing and Shipping Charges option when you do the copy.

Related Topics

- [Return Sales Orders](#)
- [Add Configured Items to Order Lines](#)
- [Supplier Ship and Debit](#)

4 Ship and Bill

Shipment and Billing Details

Manage shipment, billing, and payment for your sales order.

The sales order sets shipment, billing, and payment values by default according to the customer you select. You can accept the default values, or modify them to meet your requirements:

New Sales Order

Draft

Business Unit Vision Operations Customer Computer Service and Rentals Order Total 0.00 USD

Business Unit Vision Operations Customer Computer Service and Rentals Bill-to Account Number 1006 Ship-to Account 1800 S

Additional order details

Try line number, item details, line status, or warehouse

0 items Copy Line Update Lines Expected accept default values, orspecify how to ship and bill

Line Alerts

No data to display.

▼ Billing

Bill-to Customer Computer Service and Rentals Bill-to Account Number 1006 Bill-to Site 1034

Bill-to Contact Bill-to Contact Method Payment Terms 30 Net

▼ Shipping

Ship-to Customer Computer Service and Rentals Ship-to Registry ID 1006 Ship-to Site 1222

Ship-to Contact Charles Baker Ship-to Contact Method sendmail-test-discard@oracle Request Type Ship on

Earliest Acceptable Date Latest Acceptable Date Packing Instructions

Shipping Method Shipment Priority Ship Lines Together

Use the shipment details:

- Set ship-to details, such as the ship-to contact person.
- Set the method, such as United States Postal Service.
- Specify freight terms, such as prepaid.
- Specify shipment priority, such as High.

- Add text that describes packing and shipping instructions.
- Estimate availability.
- Ship order lines together in a shipment set or by themselves.
- Specify the supplier, such as the warehouse, the company who supplies the item, and item substitution.

Use the Billing section:

- Set billing details, such as the bill-to contact person.
- Set the payment term, such as Net 30.
- Enter purchase order details.
- Edit accounting details.

Select the Customer First

The value you set in the Customer attribute affects values you can select in other attributes. For example, the sales order only displays contacts in the Bill-to Contact attribute who are associated with the customer. This behavior also applies with the Bill-to Location, Ship-to Contact, Ship-to Method, Warehouse, Supplier, and so on. If you can't find the value you need, ask your order administrator.

Set Billing and Payment

Order Management might disable some attributes in the Billing section. For example, you must select the Bill-to Location before you can select the Bill-to Contact, and you must select the Bill-to Contact before you can select the Bill-to Method.

Order Management might also disable other attributes depending on the value that you select in the Customer attribute. For example, your order administrator might set up the customer so it uses only one Bill-to Location.

Select Accounting Details

Use the attributes on the order line to tell Order Management how to send accounting details to Oracle Receivables:

Attribute	Description
Accounting Rule	Select the revenue recognition to send to Oracle Receivables for the invoice line. If you select an accounting rule, then Oracle Receivables will use the value you select instead of the default value it uses.
Invoicing Rule	Select the time frame to send to Oracle Receivables. The time frame determines when to recognize receivables if the invoice includes more than one accounting period. If you select an invoicing rule, then Oracle Receivables will use the value you select instead of the default value it uses.
Receivables Transaction Type	Select the accounting for debit memos, credit memos, on-account credits, and invoices that Oracle Receivables creates. Specify whether your transaction entries update customer balances and whether Oracle Receivables posts these transactions to your general ledger. Oracle Receivables doesn't use a default value for the receivables transaction. It will use the value you select.

Override Details on Order Lines

Some values that you set might override values that you set elsewhere in the sales order. For example, you can enter a value for the Purchase Order on the order header that applies to all order lines. You can also enter a value for the Purchase Order Line on the order line.

Related Topics

- [Reauthorize Payment](#)
- [Edit Recurring Billing](#)

Shipment

Use Availability to Manage Order Lines

View availability details on order lines before or after you submit the sales order. Use this feature to view the order lines' expected ship date, arrival date, and delay so you can decide whether to take further action and resolve the delay, such as changing the item, quantity, or other attributes.

Check Availability

Use Check Availability to reschedule the fulfillment line. Use it to view the scheduling options that are available, see the best option, and get the details that you need to evaluate each option:

- If Order Management already scheduled the order line, and if your selection changes the Scheduled Ship Date, then Order Management processes the change.
- To source from a different warehouse, remove the value from the Warehouse attribute, then click Check Availability. Order Management will recommend a warehouse according to sourcing rules and warehouse rankings.
- Your order administrator does the set up that determines the best option and ranks the warehouses. For details, ask your order administrator.

Check availability on the order header or order line before you submit the sales order. Click an action in the Order Management work area, then use a page where you can review and finalize availability options from Global Order Promising. Use it to improve your efficiency:

- Check availability, and schedule one or more order lines while you work on one or more sales orders all at the same time.
- You can also apply changes when you check availability for a single sales order.

Try it:

1. Set up your sourcing rules in Global Order Promising. For details, see [Source Your Supply Chain](#).
2. Go to the Order Management work area, then click **Tasks > Sales Orders (New)**.
3. Search for, then open your sales order for editing.
4. Immediately above the order line, click **Customize Columns**, then display these attributes:
 - Expected Ship Date

- o Expected Arrival Date
- o Delay
- o Warehouse
- i. Select an **order line**, click **Expected Availability** , then look at the results. The Delay attribute will display one of these values:

Value	Description
On Time	<p>If the request is for:</p> <ul style="list-style-type: none"> o Ship On. The Expected Ship Date happens on or before the Requested Date. o Arrive On. The Expected Arrival Date happens on or before the Requested Date.
On Time Split	Same as On Time, except Promising split the line into more than one shipment so it could meet the requested date.
Delayed	<p>If the request is for:</p> <ul style="list-style-type: none"> o Ship On. The Expected Ship Date happens after the Requested Date. o Arrive On. The Expected Arrival Date happens after the Requested Date.
Delayed Split	Same as Delayed, except Promising split the line into more than one shipment so it could meet the requested date as close as possible.
Error	<p>If you haven't set up your sourcing rules, you might see an error like:</p> <p>Sourcing for item AS54888 isn't set up correctly. Check your item setup, assign your sourcing rule, and refresh the Order Promising server.</p> <p>If you see this error, go to the Order Promising work area and do the set up.</p>

Schedule Order Lines Before You Submit

1. Continuing our example, notice that the Scheduled Ship Date and Scheduled Arrival Date are empty. Select an order line, then click **More Actions > Check Availability** .
2. Use the Check Availability page to get availability details and to see whether supply is available for an order line before you submit the sales order. Assume that the Availability Status in this example is On Time.
3. Click **Edit Line Settings**, and then modify attributes that might improve availability. Change the value of an attribute or clear it. For example, change the Requested Ship From Warehouse. You can also click **View Availability Options** to explore other options.

For example, consider how using a different shipping location will affect fulfillment. You can see the days of delay, cost, and expected arrival for each option.

On the Check Availability page, click **Schedule** on the header to schedule all lines, or click **More Actions > Schedule Selected and Close** to schedule only the lines that you selected, and then notice that the Scheduled Ship Date and Scheduled Arrival Date now have dates on the Order page.

Order Management updated them according to the changes that you made on the Check Availability page.

Unschedule Order Lines Before You Submit

You can unschedule an order line before you submit the sales order. Notice that the Scheduled Ship Date and Scheduled Arrival Date each have a value. Click **Actions > Unschedule** , then notice that those dates are gone.

Reschedule Lines After You Submit

1. Search for and open a sales order that you already submitted.
2. Assume you see that the order line's status is Not Started. Select the order line, then click **More Actions > Check Availability** .
3. On the Check Availability page, select your **order line**, then modify an attribute.
4. Notice that the Revised attribute contains an icon, then click **Schedule** .
5. On the Order page, notice that the Line Status attribute now contains Scheduled.
6. Get the latest status so you can accurately provide the expected ship and arrival dates when you reply to customer queries about where's my order. Modify the order's attributes to help meet the requested dates. Explore and apply alternative fulfillment options.

Check Availability on the Sales Order Lines Page

1. Select order lines on the Sales Order Lines page, then click **More Actions > Check Availability** .
2. Notice how the page displays a process ID on the banner at the bottom of the page. You can use the process ID to monitor the status of your schedule action and also to get details about lines that aren't eligible to schedule.
3. Copy the ID, such as 300100651758541, to your clipboard, click **Action Status**, search for the process ID, then examine the status, such as Completed. If a request fails, the page displays a message that you can use to fix the failure and redo the action.
4. Click the process ID to get details.
5. Edit your lines, then click **Schedule** to schedule them.

Apply Changes While You Check Availability

As an alternative, you can apply your changes on the Check Availability page. Edit your lines, then click **Apply** .

Order Management will apply your changes to the sales order.

Adjust Attributes That Affect Availability Status

If there's a delay, and if your customer can't accept that delay or if Order Management can't fulfill the order line, then adjust one or more of these attributes:

Attribute	Value to Set
Request Type	Arrive On
Requested Date	Set to a later date.
Shipping Method	Set to a faster method. For example, change it from standard ground shipping to overnight priority shipping.
Ship Lines Together	No For details, see <i>Ship Order Lines in Shipment Sets</i> .

Attribute	Value to Set
Latest Acceptable Date	Set to a later date.
Allow Partial Shipments of Lines	Yes For details, see <i>Specify Shipping Details for Sales Orders</i> .
Shipment Priority	Yes For details, see <i>Specify Shipping Details for Sales Orders</i> .
Warehouse	Set to a warehouse that's physically closer to the ship-to address, or who maintains a superior fulfillment performance.
Supplier	Set to a supplier who maintains a superior fulfillment performance.
Supplier Site	Set to a supplier site that's physically closer to the ship-to address.
Demand Class	Set to a higher priority.
Allow Item Substitution	Yes
Ship-to Address	Set to an address that's physically closer to the warehouse or the supplier. Make sure your customer can accept the new ship-to address.
Shipment Set	Leave empty.

Example

Assume you discover the transit time is long for some reason. You can set Request Type to Ship On to reduce or remove the delay:

Value	Description
Ship On	Use the date when order fulfillment expects to ship the order line from the fulfillment source, such as the warehouse or a supplier.
Arrive On	Use the date when order fulfillment expects the carrier to deliver the order line to the ship-to address.

The Request Type attribute affects how Order Management calculates availability status. Order Management will attempt to reduce or remove the delay according to the value you select.

Another Example

Set the Ship Lines Together option to one of these values:

- **Yes.** Calculate availability status according to the order line that causes the longest delay. Use this setting when your customer must receive order lines in one shipment.
- **No.** Calculate availability status differently for each order line. Use this setting when your customer can accept receiving order lines in more than one shipment. It might reduce delay for some lines.

Guidelines

You can:

- Check availability from the Order page or the Sales Order Lines page.
- Check availability and schedule across sales orders.
- Check availability on order lines that are in Draft status or Processing status. The Check Availability page won't display an order line that isn't in Draft or Processing status.
- You can click **More Actions > View Availability Details** on the Check Availability page to get details about the line, such as pegging type and set.

Note

- You must set up your sourcing rules. See [Set Up Promising Rules and Sourcing Rules for Order Management](#).
- Order Management calculates the priority for scheduling according to the requested ship date or the arrival date when you use the Check Availability page.
- You can't select a line that isn't shippable, such as a coverage item.
- You can't separate a shipment set on the Check Availability page.

For more, see [Redwood: Check Availability](#) and [Redwood: View Availability Details in Order Management](#).

Related Topics

- [Create Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)
- [Specify Shipping Details for Sales Orders](#)
- [Fulfillment Line Status](#)

Override Shipment Details

Your sales order automatically sets shipment details on the order line according to the customer that you select on the order header. You can override these details on each order line.

1. Go to the Order Management work area, create a new sales order, then select a value in the Customer attribute.
2. Add an item to an order line, search for an item, then click **Apply**.
3. Display the attribute that you need to override, set a value for it, then click **Apply**.

Note

- Order Management will use the override values that you provide only for the order line you're editing.
- If you override a value then modify a value on the order header, then Order Management won't remove your override. Assume you override the Bill-to Customer and the Requested Date on an order line. You then

modify these attributes on the header. Order Management will continue to use your override values for these attributes.

If you prefer to use values from the header, then you must remove the override, then modify the header's value.

- You can't override some attributes until you set the value for another attribute. For example, you must set the Ship-to Customer attribute before you can set the Ship-to Address attribute.

Order Management automatically sets an override when:

- You set Allow Partial Shipments to No.
- You don't set the Shipping Method, Warehouse, or Supplier in the shipment details. You submit, then order fulfillment sets the value for each of these attributes, and Order Management overrides them with the values that order fulfillment sets.

Related Topics

- [Create Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)

Specify Shipping Details for Sales Orders

Use the order header's shipment details to specify shipping details.

Set Acceptable Dates

Set the values in the Latest Acceptable Date attribute and the Earliest Acceptable Date attribute to specify when the customer is willing to accept shipment.

If you don't set them, then Order Management will attempt to deliver the sales order no earlier than the Ordered Date, and no later than the Requested Date:

Attribute	Description
Latest Acceptable Date	Set the Latest Acceptable Date to happen anytime after the Requested Date. If you set it, then Order Management will attempt to deliver the sales order no later than the Requested Date.
Earliest Acceptable Date	<p>Set the Earliest Acceptable Date to happen anytime before the Requested Date. If you set it, then Order Management won't deliver the sales order before the Requested Date.</p> <p>This feature is useful when your customer can't receive delivery until some point in the future. For example, the customer is traveling and won't be at the delivery site, or the delivery site is under construction.</p> <p>If you set the Request Type attribute to Arrive On, then you can't specify the Earliest Acceptable Date.</p>

Allow Partial Shipment

If you set the Allow Partial Shipments of Lines option to Yes, then Order Management can ship one order line in more than one shipment, if necessary.

Consider a scenario:

- You create a sales order that includes 100 units of a desktop computer on a single order line.
- Order fulfillment considers only Supplier A and Supplier B.
- Supplier A can fulfill 75 units and Supplier B can fulfill 50.

You set Allow Partial Shipments of Lines to a value:

Value	Description
Yes	Order Management will immediately fulfill the sales order. It might ship 60 units from Supplier A in one shipment, and 40 units from Supplier B in another shipment. These shipments might arrive at the customer site at different times, depending on how long it takes the supplier to assemble the order, variations in transit time, and so on. For example, the 60 units from Supplier A might arrive on October 1, and the 40 units from Supplier B might arrive on October 4.
No	Order Management will delay the shipment until Supplier A or Supplier B can fulfill 100 units, and then ship all units in a single shipment from the supplier who can fulfill the line.

Ask your customer to determine whether receiving the sales order in a single shipment is most important and potentially delaying it, or whether the customer can receive the order in more than one shipment and potentially receive it on different days.

Shipping in more than one shipment might increase transit cost.

For technical details, see [Update Attributes on Split Order Lines for Partial Shipments](#).

Set Other Attributes on the Shipping Tab

Attribute	Description
Shipment Priority	Prioritizes shipment for this sales order in relationship to other sales orders.
Shipping Instructions Packing Instructions	Order Management sends the text you enter in the Shipping Instructions attribute and the Packing Instructions attribute to other applications that reside downstream in order fulfillment, such as Oracle Shipping, or some other application that your order administrator specifies. These downstream applications can print the text on packing slips or other shipping documents.

Related Topics

- [Create Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)
- [Ship Order Lines in Shipment Sets](#)

Specify Supply Details for Sales Orders

Use the order header's shipment details to specify supply details.

Attribute	Description
Warehouse Supplier Supplier Site	<p>In most situations, your order administrator creates rules that determine the Warehouse, Supplier, and Supplier Site, so you don't need to set them.</p> <p>However, you can use them to specify a drop shipment. For example, you can specify the manufacturer who will drop ship the item to the customer in the Supplier attribute and the location where the manufacturer resides in the Supplier Site attribute.</p>
Demand Class	<p>Place a priority during order fulfillment on this sales order when compared to other sales orders.</p> <p>If you don't specify a demand class, then Order Management fulfills this sales order on a first-come, first-serve basis.</p> <p>Consider a scenario:</p> <ul style="list-style-type: none"> • You are an order manager at a company that's attempting to renew the approved supplier status with ABC Corporation. • The negotiators at this corporation stated they're considering not renewing the status because several sales orders are late. • You must make sure Order Management delivers the late orders with priority. • You search for all fulfillment lines for ABC Corporation, select them, open Edit Fulfillment Lines, then set Demand Class to High Priority.
Allow Item Substitution	<p>Substitute the item the customer is ordering with some other item.</p> <p>Assume your customer is ordering a laptop computer with a 150 GB hard drive, the supply of 150 GB hard drives is low, but a surplus of 180 GB hard drives exists.</p> <p>If you allow item substitution, Order Management will substitute the 180 GB hard drive for the 150 GB hard drive, depending on the substitution rules your order administrator set up.</p> <p>Use this feature when inventory is low or out of stock and the customer can't wait for order fulfillment to replenish stock.</p>

Related Topics

- [Create Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)
- [Overview of Drop Ship in Order Management](#)

Shipment Sets

Ship Order Lines in Shipment Sets

Ship order lines together so they all ship and arrive on the same date.

A shipment set is a set of order lines that Order Management ships together as one group. All of these lines ship and arrive on the same date, although they might ship across more than one package, depending on packing requirements:

- For example, assume your sales orders often include a desktop computer, monitor, mouse, and keyboard. You can ship them together in a shipment set.
- Use a shipment set when your customer must receive all the order lines in a shipment set in the same shipment but can receive other order lines separately or as part of another shipment set.
- Use a shipment set instead of the Ship Lines Together option when you must specify shipping on only some of the order lines, or you need to group lines into sets.
- Use a shipment set to reduce shipping charges. It usually costs less to ship fewer packages.
- You can create more than one shipment set for a single sales order.
- You can create a shipment set on a single order line.

General Guidelines

- Make sure each line in your shipment set uses the same value for:
 - The source you use for the item, such as Warehouse, Supplier, and Supplier Site
 - Requested Ship Date and Scheduled Ship Date
 - Shipping Method and Shipment Priority

If you need different values for these attributes, then create more than one shipment set and group your lines into each set according to the lines that can use the same attribute values.

- You can add an order line to a shipment set only when you add the line to the order. For example, you can't submit the order, revise the order, then add the line to the set.
- Don't add a return order line to a shipment set.
- Don't add lines to the same shipment set when you fulfill them through different fulfillment flows. For example, don't add order line 1 when you fulfill it through a drop shipment that a drop ship supplier supplies, and order line 2 through on-hand inventory that's available in the warehouse in back-to-back fulfillment.

Substitute

- You can't move an order line from one shipment set to another shipment set.
- If Order Management already shipped the order line, then you can't remove the line from the shipment set.
- You can substitute a standard item, but you can't substitute a configured item or kit.
- You can substitute the required components of an assemble-to-order item, but not the optional ones.

- Use the Check Availability action to substitute an item that's part of a shipment set. Don't use the Substitute Item action. For details, see *Fix Problems and Improve Performance*.
- Don't substitute an item in a drop ship flow. Assume you want to substitute the AS55000 desktop computer for the AS54888 desktop computer. Instead of substituting these items, cancel the order line that has the AS54888, which also cancels the purchase order for the AS54888. Create a new order line that has the AS55000, which creates a new purchase order for the AS55000.

Partial Shipment

Partial shipment happens when Order Management can fulfill only part of the quantity because all of the quantity isn't available in inventory. Assume quantity is 10 on an order line, Order Management ships 4, and places 6 on backorder:

- Order Management ships the backordered quantity when it becomes available in inventory.
- You can cancel the entire quantity that Order Management hasn't shipped.
- You can't update an attribute on an order line that Order Management has only partially shipped.

You can't cancel only part of the quantity. You can cancel the entire 6. You can't cancel part of the backorder, such as 3.

- You can't update any line in the shipment set that Order Management hasn't shipped.
- If Order Management already shipped even one line of the shipment set, then you can't add another line to the set.
- If Order Management ships only some of the lines or only part of a line in the shipment set, then it might remove the lines it hasn't shipped from the set. You can fulfill or cancel the removed line, but you can't do an action on it, such as Edit, Unschedule, Unreserve, and so on.

Revise

- You can't create a revision to add an existing order line to a new or existing shipment set. For example, you can't move shipment set n from order x to order y. You must create a new shipment set in order y.
- If you revise a line that's part of a shipment set, then Order Management revises all lines in the set. The shipment set applies only to attributes Warehouse, Shipping Method, Requested Ship Date, or Requested Arrival Date. For example, if you change the Shipping Method to Second Day Air on a line in a set, then Order Management changes the method to Second Day Air on all other lines in the set.
- Order Management processes the revision on all lines so it can estimate the scheduled ship date according to the quantity you changed.
- If Order Management already shipped at least one line in the set, then you can't add a line to the set when you revise a sales order.
- If you cancel all lines in a set, then you can't add a new line to the set. Instead, add your line to a different shipment set.
- You can't add lines and remove lines in a shipment set at the same time. Instead, revise the sales order, remove your line in the set, then submit the order. Wait for Order Management to process the revision. Revise the order again, add your line, then submit the order.
- You can't remove lines and cancel lines in a shipment set at the same time. Instead, revise the sales order, remove your line from the shipment set, then submit the order. Wait for Order Management to process the revision. Revise the order again, cancel the line, then submit the order.

Coverage

Add an order line that has a coverage item only if you're using the shipment set to group the coverage line with the line that it covers. For example, if line 1 contains the AS54888 Desktop Computer, and line 2 contains a warranty that covers the AS54888 on line 1, then it's ok to include line 1 and 2 in the set. Otherwise, don't add lines that you can't ship to your shipment set, such as a service, coverage, warranty, subscription, and so on.

If an order line contains a coverage item:

- You can't assign a shipment set to the line because you can't ship a coverage item.
- You can't edit the shipment set attribute on the line even if you override the line.
- You can't use the Update Lines action to edit or update shipment set the values on the line.

If an order line contains a coverage item, and:

- You use the Ship Lines Together option, then Order Management doesn't assign the default shipment set to the coverage line.
- You assign a shipment set to the line before update 20D, then you can use the Override Order Line action in the Order Management work area to update the value in the Shipment Set attribute. For details, see *Override Shipment Details*.

Related Topics

- [Create Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)
- [Cancel Order Lines That Remain in Same Status](#)

Ship Order Lines in One or More Shipment Sets

Ship order lines in different shipments sets or in one shipment set.

Ship Order Lines in Different Shipment Sets

In this example, you will add four order lines, and you will ship three of them together in one shipment set:

Order 522010

Draft

Business Unit Vision Operations Customer Computer Service and Rentals Order Total 3 546.00 USD

Business Unit
Vision Operations

Customer
Computer Service and Rentals

Bill-to Acc
1006

Additional order details

4 items
Copy Line
Update Lines
Expected Availability
More Actions ▾

<input type="checkbox"/>	Line	Alerts	Item	Shipment Set	Quantity	Charge Name	Unit Selling...
<input type="checkbox"/>	4		Holographic Tablet	2	1	Ea Sale Price	150.00
<input type="checkbox"/>	4		HD Monitor	1	1	Ea Sale Price	150.00
<input type="checkbox"/>	3		Basic Mouse	1	1	Ea Sale Price	150.00
<input type="checkbox"/>	1		AS54888	1	1	Ea Sale Price	2 505.00

Ship lines together.

This topic uses example values. You might need different values, depending on your business requirements.

Assume you must ship the monitor, desktop computer, and modem together in one shipment and the tablet in another shipment.

Try it:

1. Go to the Order Management work area, create a new sales order, then set the Business Unit and the Customer attributes.
2. Display the Shipment Set attribute on the order line.
3. Add 3 order lines for these items:
 - o AS54888 Standard Desktop
 - o CM15140 Monitor 19"
 - o MKT703 Vision WireFreedom Modem
4. Select any order line, click **More Actions > Add or Modify Shipment Set**, set the attribute values, then click **Update Shipment Set**:

Attribute	Value
Shipment Set	1 You can enter any alphanumeric value.
Request Type	Ship On
Requested Date	Accept the default
Remaining attributes	Set to meet your requirements.

5. Set the Shipment Set attribute to 1 on each order line.
6. Add the TABLET_FAM Product Family item, select its order line, repeat step 4 except name the set 2, then set the Shipment Set attribute to 2 on the tablet's order line.

Ship All Order Lines in One Shipment Set

What if you need to ship all lines together, but don't need more than one shipment set? You can set the Shipment Set attribute to 1 on the tablet's order line.

Related Topics

- [Create Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)
- [Cancel Order Lines That Remain in Same Status](#)

Remove or Cancel Lines in Shipment Sets

Remove or cancel lines in shipment sets.

Remove Lines from Shipment Sets

1. If you already submitted the sales order, then create a revision. Otherwise, skip this step.
2. Delete the value from the Shipment Set attribute on the order line that you must remove from the set.

If you already submitted the order but don't want to revise it:

1. Go to **Home > Order Management > Order Management (New) > Manage Fulfillment Lines**.
2. Query for and select the line that you need to remove, then click **Actions > Remove Shipment Set**.

Note

- You can remove the line from the shipment set only if the order line is on the Scheduling task, and if the task status is Manual Scheduling Required.
- An action that you do on a line in a shipment set while you're in the fulfillment view applies to all lines in the set:
 - Edit
 - Schedule
 - Unschedule
 - Reserve
 - Unreserve
 - Apply Hold
 - Release Hold

For example, if the set includes line 1, 2 and 3, and if you use the Apply Hold action on line 1, then Order Management applies the same hold action on lines 2 and 3.

Cancel Lines in Shipment Sets

Assume:

- You have three lines in a shipment set, and each line has a quantity of 10.
- Order Management ships 4 units of line 1, and 3 units of line 2.
- Order Management hasn't shipped any units of line 3.
- Here's the status:

Line	Quantity	Status
1	4	Shipped
1	6	Backordered
2	3	Shipped
2	7	Backordered

Line	Quantity	Status
3	10	Awaiting Shipping

Now you can:

- Cancel all of line 3 and not take action on any other line.
- Cancel all of line 3 and cancel all of the backordered quantity on lines 1 and 2.
- Cancel all of the backordered quantity on lines 1 and 2 and not take any action on line 3.

If you want to cancel backordered or staged quantity, then you must cancel all the backordered or staged quantity in the shipment set. You can't cancel the backordered or staged quantity on only some lines. For example, you can't cancel the backordered quantity of only line 1, or only line 2. You must cancel all of the backordered quantity on lines 1 and 2.

For more, see [Cancel Order Lines That Remain in Same Status](#).

Related Topics

- [Create Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)
- [Cancel Order Lines That Remain in Same Status](#)

Shipment Tolerances

Shipment Tolerances

Use shipment tolerances to help manage the variability in your supply chain that makes it difficult to fulfill an exact quantity on an order line on a specific date.

Use a tolerance to make sure you can ship the entire manufactured quantity to your customer, even if it exceeds the ordered quantity. Eliminate inventory carrying costs for the additional quantity and increase revenue. Reduce or eliminate the time you spend doing a manual workaround to manage order fulfillment, and, as a result, improve your customer's satisfaction.

Variability is inherent in some supply chains. For example:

- Item attributes that affect fulfillment vary for instance of the item, such as weight, size, complexity, and so on.
- Your item is prone to natural phenomena that you can't control or predict, such as fruit or produce that molds in the field if its too wet, dries out quickly if its too hot, or a percent of it spoils while held up in a queue during shipping when going through customs or an agriculture check.
- Your supply source is inconsistent and constantly changing.
- Your manufacturing process is complex and prone to widely variable failure rates.
- The political environment or government policies affect your supply chain in a way that makes it hard to accurately predict when and where you will source material, how you build the item, the shipping channels that are available to you, and so on.

Example

Assume you work for Green Corp, a sustainable forestry company that uses railroads to ship a bulk material, such as raw timber that you haven't kiln dried or milled. Your customer orders a quantity of 900 tons:

Order 522010

Draft

Business Unit **Vision Operations** Customer **TALL TREE INVESTMENTS INC** Order Total **3 546.00 USD**

Business Unit Vision Operations Customer TALL TREE INVESTMENTS INC Bill-to Account Number 1438531

Additional order details

Try line number, item details, line status, or warehouse

4 items Copy Line Update Lines Expected Availability More Actions

Line	Item	Quantity	Overfulfillment Tolerance	Underfulfillment Tolerance	Requested Date
4	Lumber	900	10	10	11/18/25 8:09 PM

Order Management

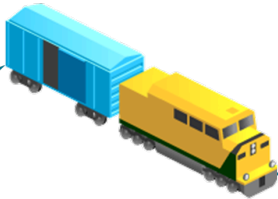
Sales Order

Deliver by

%

Tolerance range.

- 900 - 10% is 810 tons
- 900 + 10% is 990 tons



870 tons actually ship



Bill for 870 tons



Your Customer



Note

- You plan to ship the order on train cars that have a maximum capacity of 100 tons each.
- You must reserve the cars weeks in advance, the railroad charges you for each car, so you prefer to fill them as close to capacity as possible. But there's a significant variation in the amount of lumber you can get on a single car because moisture content varies from season to season and year to year, and moisture content affects weight. Even the location where you source the lumber affects the weight of your item, such as the wet Pacific Northwest compared to the drier Rocky Mountains.
- Given these factors, it's nearly impossible to accurately and consistently predict weight or volume, so you arranged an agreement with your customer to deliver quantity within a range that you and your customer can tolerate.
- The agreement is to ship with a 10% over shipment tolerance and 10% under shipment tolerance.
- 10% of 900 is 90, so you can ship between 810 tons (900 minus 90) and 990 tons (900 plus 90) and remain within the tolerance.
- The actual shipment ends up being 870 tons during fulfillment, which is an undershipment. Billing bills the customer for 870 tons.

Examine Shipment Tolerances on Order Lines

Your order administrator sets up default values for shipment tolerances. You can't change them, but you can view them.

The shipment tolerance attributes on the order line come predefined as hidden. You must display them:

1. Create a sales order and add an order line.
2. Display these attributes on the order line:
 - Over Fulfillment Tolerance
 - Under Fulfillment Tolerance

Note

- The value in a tolerance attribute represents a percent. It doesn't represent a quantity. For example, if the Quantity attribute contains 10, and if Over Fulfillment Tolerance contains 10, then Over Fulfillment Tolerance represents 10% of 10, which is 1. So, shipping can ship up to a quantity of 11 because 10 plus 1 is 11.
- Tolerances are specific for each item or, depending on how your order administrator sets them up, for each business unit.
- If you copy a sales order, then Order Management doesn't copy tolerances from the sales order. It gets the default values that your order administrator set up. The values in the copied order and the default values will be the same most of the time.
- If you split an order line, then Order Management copies tolerances from the line you split to the new line.
- Order Management doesn't update pricing during shipping, so the sales order doesn't update the order line total according to shipped quantity. If an overshipment or undershipment happens, then the order line total is different from the line total on the invoice.
- Order Management doesn't do credit check during shipping, so an overshipment or undershipment on an order line affects the overall credit limit when compared to the authorized credit limit.

Limitations

You can't:

- Change tolerance values when you revise an order.
- Use tolerances with a configured item, kit, or item that doesn't ship, such as a subscription or warranty. If your order administrator enables shipment tolerances, then Order Management sets tolerance values to zero for these items, and you can't change the value.
- Associate a coverage item with a covered item line that has shipment tolerances.
- Use tolerances in a drop-ship flow, return material authorization, transfer order, return transfer order, return to supplier, or outside processing.

Covered Items

If the order line includes a covered item, and if it has shipment tolerances, then you can't add another order line that adds coverage to the covered item. Assume you add an order line for the Lumber item, and your order administrator set up Lumber so the order line automatically adds 10% under tolerance and 10% over tolerance. You can't add another order line that covers Lumber, such as insurance.

Shipment Set

You can add an order line that has tolerances to a shipment set.

The shipment set can include more than one order line that has tolerances.

The tolerances can be different for each line in the set.

Return Orders

If you create a return that references the original sales order, and if the original sales order includes shipment tolerances, then Order Management uses the fulfilled quantity or shipped quantity on the original order line instead of the ordered quantity when it calculates the quantity you can return.

Order Management sets the tolerance attributes to zero on each return line.

Adjust Price for Some Returns

You can do a manual price adjustment to correct the amount on the return line for some returns.

You can return an item that has tolerances, but if you over shipped the order line on the original sales order, and if your order administrator sets a parameter named Quantity to Invoice for Overshipment to Ordered Quantity, then returning more than the ordered quantity might cause the returnable amount on the return line to be greater than the invoiced amount on the original order line.

Assume the original order line has a quantity of 100, each priced at \$10. You over ship a quantity of 110, but you bill your customer for only 100, which is the ordered quantity. The total bill is quantity 100 multiplied by price of 10 equals \$1,000. You create a return for the order line, your customer wants to return the entire quantity of 110, so you will send a total credit of \$1,100 to your customer, which is 110 multiplied by 10. You will be returning \$100 more than the billed amount, which is only \$1,000. To correct the amount, do a manual price adjustment of \$100 on the return line.

Manage Shipments and Pick Slips That Include Shipment Tolerances

You use different work areas to manage shipments and pick slips that include shipment tolerances.

Manage Shipments

1. Sign in with the privileges that you need to manage shipments.

Here are some predefined job roles that have these privileges:

- Warehouse Manager
- Shipping Manager
- Warehouse Operator
- Shipping Agent

This topic uses predefined job roles. You must create your own job roles, depending on your security requirements. For details, see [Get the Privileges That You Need to Implement Order Management](#).

2. Go to the Inventory Management work area.
3. On the Inventory Management page, click **Shipments > Show Tasks > Shipments > Manage Shipment Lines**.
4. On the Manage Shipment Lines page, search for your sales order.
5. Display these attributes:

Attribute	Description
Requested Quantity	Requested quantity from the sales order.
Maximum Undershhipment Percentage	Maximum percent under the requested quantity that you can ship and still consider the line fulfilled. For example, if the requested quantity is 100, and if Maximum Undershhipment Percent is 10, then you can ship 90 and consider the line fulfilled. If you ship 89, then it isn't fulfilled.
Maximum Overshipment Percentage	Maximum percent over the requested quantity that you can ship and still consider the line fulfilled. For example, if the requested quantity is 100, and the Maximum Overshipment Percent is 10, then you can ship 110 and consider the line fulfilled. Shipping doesn't allow you to ship 111.
Shipped Quantity	Quantity that Shipping actually shipped.

6. Examine the values.

Manage Pick Slips

1. On the Inventory Management page, click **Shipments > Show Tasks > Shipments > Confirm Pick Slips**.
2. On the Confirm Pick Slips page, search for your pick slip.
3. In the search results, click the **link** in the Pick Slip column.
4. On the Confirm Pick Slip page, examine the attributes:

Attribute	Description
Requested Quantity	Displays the requested quantity from the sales order.
Picked Quantity	Enter the quantity you actually picked.
Source Subinventory	Select the subinventory you used to pick the quantity.
Maximum Picked Quantity	Displays the maximum quantity you can pick according to the overshipment tolerance. For example, if the requested quantity is 100, and if Maximum Overshipment Percent is 10, then you can pick a maximum quantity of 110. Shipping doesn't allow you to pick 111.

Note

- Shipping allocates material up to the ordered quantity, but you can pick more than the allocated quantity. To close a shipment, Shipping evaluates your tolerance settings on the line, then cancels any remaining lines that aren't manifested, confirmed, or shipped.
- For a shipment set, if each line in the set meets the tolerance behavior, then you can pick and ship the lines together. If under tolerance applies, and if the quantity of the lines that Shipping shipped is less than the order quantity, and if the quantity on the shipped lines also meet the under tolerance quantity, then Shipping assumes the shipment meets the shipment set criteria and considers that shipping for the shipment set is done.
- If you or shipping stages more quantity than the tolerance requires, then you must manually move the material back to storage.
- If you or shipping stages more quantity than the tolerance requires, and if automatic packing splits the line and creates a new line, and if the requested quantity exceeds the staged quantity on the new line, then you must manually pack the line.
- If shipping automatically stages lines, then you can use the split line action to create another line and ship more quantity.

Billing and Payment

Edit Recurring Billing

If you add an item that includes recurring billing, then the sales order displays the recurring charge on the order line. You can edit how the sales order does this billing.

This topic uses example values. You might need different values, depending on your business requirements.

Edit recurring billing:

1. Go to the Order Management work area, then create a new sales order.
2. On the New Sales Order page, add a value in the Customer attribute.
3. Search for an item that includes recurring billing on the order line, such as AS54600 Standard 9000-S Laptop, then click **Add**.

If you add an item that includes recurring billing, then the sales order displays the recurring charge on the order line and the sale price. For example:

`Recurring Sale Price (Month) 16.24, Sale Price 1,500`

4. Click **Billing and Payment Details**.
5. In the Billing section, in the Order Line Details section, click the **down arrow** in the order line that includes the recurring billing that you must edit, then click **Edit Recurring Billing**.
6. In the Edit Recurring Billing dialog, set the values, then click **OK**:

Attribute	Description
Number of Billing Periods	Select the number of billing periods that this billing plan contains.
Recurring Billing Start Date	See the Recurring Billing Start Date section later in this topic.
Recurring Billing End Date	Leave empty. You can't use this attribute.
Billing Plan Overrides	See the Setting Billing Plan Overrides section in this topic.

Note

- You can modify the attributes in the Edit Recurring Billing dialog in any sequence. No attributes are required, and no attribute affects any other attribute that the dialog displays.
- The value in the order line's Amount column doesn't display any overrides that you specify for recurring billing.
- You can edit recurring billing only for an item that your order administrator has set up for recurring billing. Ask your order administrator for details.

Override the Billing Plan

Use the Billing Plan Overrides attribute to specify how to override each of the billing periods.

For example, assume you set Number of Billing Periods to 12, and you use these values in the Billing Plan Overrides area:

Period	Quantity	Amount
1	2	20.00
2	2	60.00
3	2	40.00
11	2	70.00
12	2	40.00

Here's what the sales order will do:

- Use the values you set in the Override Amount attribute for periods 1,2,3,11, and 12.
- Use the default values for periods 4 through 10.
- Use the value you set in Override Quantity for billing period 1.
- Use the default quantity for all other billing periods.

Note

- The values that you enter affect only the period that you specify. They don't affect the amount for the default billing plan or any other billing periods.
- You can specify an override for up to five billing periods.
- You can specify only a single period in each override line.

Recurring Billing's Start Date

If you need to start billing on a date that is different from the first billing period, then set the Recurring Billing Start Date attribute to the date when you want to start billing. Otherwise, leave it empty.

Assume you add an order line that has a service you bill monthly, such as Garden Maintenance:

Attribute	Description
Item	Garden Maintenance
Charge Type	Recurring at \$100 for each month.
Quantity	1

Attribute	Description
UOM	Ea

Assume:

- The contract starts on January 18, 2024.
- The contract ends on January 17, 2025.
- The contract duration is 12 months.
- The amount is \$100 for each month, with a total amount of \$1200 (\$100 multiplied by 12 months).
- You need to bill the first invoice on January 18, 2024 with an amount of \$45 for the January 18 through January 31 billing period.
- Each subsequent invoice must have an amount of \$100, billed on the first day of the month for one month of service, February 1, March 1, and so on until the contract ends.
- The amount for the last billing period will be \$155.

To implement this example, you set these values in the Edit Recurring Billing dialog:

Attribute	Value
Number of Billing Periods	12
Recurring Billing Start Date	2/1/2024 This date specifies when your billing will start.
Recurring Billing End Date	Leave empty.
Recurring Invoice Start Date	Leave empty.

Set these values in the Billing Plan Overrides section of the dialog.

Period	Amount
1	45
12	155

The order line will have these values:

Attribute	Value
Duration	1
Period	Year
Amount for Total Duration	1200

Attribute	Value
Billing Frequency	Bill Monthly
Number of Billing Periods	12

Examine Recurring Billing

Try it:

1. Open a sales order that includes recurring billing and that you already submitted.
2. Examine recurring billing on the order line.

For example:

Invoice Date	Invoice Number	Invoice Amount
10/09/2026 12:00 AM	214019	19.49
10/09/2026 12:00 AM	214020	19.49
10/09/2026 12:00 AM	214021	19.49
10/09/2026 12:00 AM	214022	19.49

Related Topics

- [Create Sales Orders](#)
- [Add Subscriptions to Sales Orders](#)

Example of Editing Recurring Billing

Use the Edit Recurring Billing dialog to set up a complex billing plan for a sales order.

For example, set up a plan that includes more than one contract period, bills monthly, adds a fee for some services, and so on.

Assume you work for Mega Phones, a company that sells subscriptions for mobile phones:

- The service comes in one, two, and three year contract periods.
- Mega Phones allows only monthly billing.
- Mega Phones provides enhanced service on a monthly basis, and the enhanced service is \$50 extra for each period.

Here's what you need to do:

- Set the contract start date to the same day that the customer calls to request service.
- Start service according to the date that the customer requests.
- Set the billing start date to the date that the service actually starts.
- Bill customers on the 20th day of each month.

Assume today's date is November 15, 2023, which is the order date, and a customer calls and requests service:

- Two year service agreement.
- Enhanced service in months 4, 5, and 6 because they want to use the Mega Phones unlimited international conferencing application during these periods.
- Start the service the next day, which is November 16, 2023.

You use the Edit Recurring Billing dialog to set up this plan. Here are the values you set in the top part of the dialog:

Attribute	Value
Contract Start Date	November 16, 2023
Contract End Date	November 16, 2025
Recurring Billing Start Date	November 20, 2023
Recurring Billing End Date	Leave empty.
Recurring Invoice Start Date	Leave empty. Order Management will use the date that you set for the Recurring Billing Start Date as the date to start the recurring invoice period. For details, see the How Oracle Receivables Sets Invoice Dates section in this topic.
Number of Periods	24 You must manually calculate the number of periods. In this example, the agreement is for two years, and the billing happens monthly. So the calculation is 12 multiplied by 2 equals 24 periods. For another example, if the agreement is for three years and billed quarterly, then the calculation is 3 multiplied by 4 equals 12 periods.
Frequency	Month

Learn how to use this dialog. For details, see [Edit Recurring Billing](#).

Here are the values that you set in the Billing Plan Overrides area of the Edit Recurring Billing dialog:

Period	Quantity	Amount
4	Leave empty.	50.00
5	Leave empty.	50.00
6	Leave empty.	50.00

How Oracle Receivables Sets Invoice Dates

Here's what Oracle Receivables does for this example:

- Sets the date for the first invoice to November 15, 2023 by default, which is the order date, and includes billing for this invoice for period November 16, 2023 through November 19, 2023, which is four days of service.
- Bills subsequent invoices monthly. For example, it sets the date for the second invoice to December 15, 2023, and includes billing for this invoice for November 20, 2023 through December 19, 2023.
- Sets the date for the last invoice to Nov 15, 2025, and includes billing for this invoice through November 16, 2025.

Set an Invoice Date That's Different From the Billing Date

The second billing period is November 20, 2023 through December 19, 2023, and this billing period might need an invoice date that happens on a date that's different from the 15th day of every month.

For example, assume Mega Phones policy requires you to create invoices on the first day of each month, but you set the Recurring Billing Start Date to November 20, 2023 because this is the date that the service actually starts.

To meet this requirement, you can set Recurring Invoice Start Date to December 1, 2023. Oracle Receivables will then create subsequent invoices and set the invoice date to the first day on each month instead of to the 15th day of the month.

Related Topics

- [Create Sales Orders](#)
- [Edit Recurring Billing](#)
- [Add Subscriptions to Sales Orders](#)

Reauthorize Payment

If you revise a sales order and it affects payment, then Order Management reauthorizes payment.

For example:

- You change the Bill To Customer attribute in the Billing section of the sales order.
- You change the Bill To Account attribute only on order line 3, then submit. Order Management will reauthorize only line 3. The other order lines will continue to use their existing authorizations because no change happened on those lines or on the header billing details.
- You change the Bill To Account attribute on the order header, then submit. Order Management will reauthorize the order header and the order lines.
- You add a new order line, then submit. Order Management will authorize the new line.

If you revise a sales order and it doesn't affect payment, then Order Management doesn't reauthorize payment. For example, Order Management doesn't reauthorize payment if you modify the sales representative or manually split an order line.

Related Topics

- [Release Holds for Order Lines That Fail Credit Check](#)

Manage Credit Cards on Sales Orders

Add and manage the credit card that you use on each sales order.

Adding a credit card is optional, depending on how your Order Administrator sets it up.

Try it:

1. Create a sales order, then set the Customer, Business Unit, and Bill-to Account on the order header.

The values you set for these attributes affects the credit cards that you can add to the sales order. You must set them before you add the credit card.

2. Click **Additional Order Details**, then set the value:

Attribute	Value
Payment Method	Credit Card You can use only one payment method for each sales order. You can't use Credit Card and On Account on the same sales order.

3. Use the default value, or select a new value in the Credit Card attribute to select a different card:

Attribute	Value
Credit Card	Number on the credit card that the issuing bank provides. This is typically a 16 digit number, in the format XXXX XXXX XXXX XXXX, such as 7684 5980 8456 1156.
Name on Card	Name of the cardholder, usually the person or company who purchases the item, such as Computer Service and Rentals.
Statement Billing Address	Physical mailing address where the issuing bank sends statements for the credit, such as 301 Summit Hill Drive, Denver, CO, 80014.
Voice Authorization	An option that indicates that you got authorization to use the credit card for this sales order, typically on a phone call with the person or company that processes the credit card transaction, such as the bank that issued the credit card.
Voice Authorization Date	Date when you received authorization to use the card. Use the date picker to make sure you use the correct format.

Attribute	Value
Voice Authorization Code	<p>Abbreviation that identifies the authorization.</p> <p>Get this value from the organization that processes the credit card transaction, which is typically the bank that issues the credit card, such as JPMorgan Chase Bank for a Visa card purchase.</p>

4. If you can't find the card you need:

- o Click **Create Credit Card**.
- o In the Create Credit Card dialog, enter values, then click **Pay-PS**.
- o In the Payment Details Area, set the Credit Card attribute to the card you just created.

Order Management associates the new card with the business unit that you set on the order header.

You can't delete a new card that you create, but you can disable it.

5. Add your order lines, then submit.

Order Management communicates with Oracle Financials, who in turn communicates with the issuing bank to make sure the credit card hasn't expired and doesn't exceed the credit limit. If the card doesn't meet these requirements, then Order Management doesn't allow the submit, and you must revise the order.

If the issuing bank approves the purchase, then the bank adds the transaction to the credit card account and Order Management fulfills the sales order.

Override Credit Card on Order Line

You can use a card on each order line that's different from the card on the sales order. You can use different cards on different order lines:

1. Create a sales order, set the Payment Method attribute to Credit Card, then add an order line.
2. Click the **Billing and Payment Details** tab.
3. In the Order Line Details area, click **Actions > Override Order Line**.
4. In the Override Order Line dialog, click **Change Credit Card**.
5. In the Payment Details area, select another card or create a new one, then click **OK**.

Related Topics

- [Create Sales Orders](#)

5 Copy, Revise, Cancel, and Return

Copy

Copy Sales Orders

Save time. Copy a sales order that already exists instead of creating a new one.

Assume you have sales order 525874, and you need to copy it:

1. Go to **Home > Order Management > Order Management (New)**, then search for and open sales order 525874.
2. Click **More Actions > Copy Order**.
3. Select the data that you want to copy.

If you don't select any options, the copy action will copy the order header values and the order lines.

4. Click **Create Copy**.

Order Details

Assume you have sales order 525874, and you need to copy it:

If You Enable This Option	Then Order Management
Additional Information	Will copy all additional information from 525874's order header to the new order header's additional information.
Attachments	Will copy all attachments from 525874's order header to the new order header's attachments.

Order Line Details

Use these options to specify whether to copy data from each line on order 525874 to a single line on the new order. For example, assume order 525874 has lines 1 and 2, line 1 has an attachment named MyAttachment, and line 2 doesn't have any attachments. If you enable the Attachments option, then Line 1 on the new order will have MyAttachment and line 2 won't have any attachments:

If You Enable This Option	Then Order Management
Additional information	Will copy the additional information from 525874's order line to the line in the new order.
Attachments	Will copy the attachment from 525874's order line to the line in the new order.
Billing Plan	Will copy the billing plan from 525874's order line to the line in the new order. The new line will include the billing frequency, such as one-time billing or recurring billing, from 525874's order line.

If You Enable This Option	Then Order Management
Unreferenced Return Line	Will copy details about each unreferenced return line from 525874 to the line in the new order. For details about unreferenced return lines, see <i>Return Items Without Original Sales Order</i> .

Pricing

If You Enable This Option	Then Order Management
Freeze Pricing and Shipping Charges	<p>Won't reprice the new order. Instead, it will use the pricing from order 525874, including any manual price adjustment that you made on order 525874.</p> <p>The new order won't include price changes that happened since you created the copied order, such as a price increase or decrease. To update pricing on the new order, you can click Save.</p>
Freeze Tax	<p>Won't calculate tax on the new order. Instead, it will use the tax from order 525874.</p> <p>If you want to enable the Freeze Tax option, you must first enable the Freeze Pricing and Shipping Charges option.</p>

Sales Credits

If You Enable This Option	Then Order Management
All	Will copy all the sales credits from order 525874 for all order lines, including credits that you have overridden on any of 525874's order lines.
None	Won't copy any sales credits from order 525874.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Cancel Sales Orders](#)
- [Return Sales Orders](#)

Revise

How Order Management Processes Change Orders

Order Management can incorporate a change order that it receives from a variety of sources.

It will:

1. Receive a change order from the Order Management work area, a source system, or a fulfillment system

2. Use processing constraints to determine whether to allow the change. A processing constraint is a rule that controls who can change a sales order, what can change in the sales order, and when the change can happen.

If constraints:

- **Allow the change.** Order Management accepts the change, then determines whether to adjust the orchestration process to accommodate the change.
 - **Don't allow the change.** Order Management displays an error message that describes why you can't make the change. For example, if you change the Warehouse attribute to a value that the order administrator hasn't set up for the item.
3. Identify the orchestration process steps that already finished and the steps that it must adjust.
 4. Set the status of the tasks that finished before the change happened, and set the status for the orchestration process to Change Pending.
 5. The fulfillment system accepts the request.
 6. Each task that makes the adjustments finishes running.
 7. Order Management sets the status of each task to a normal status, such as Completed.
 8. Order Management creates an event when it finishes order compensation or when an error happens during order compensation. Order Management uses the event to display details you can use to monitor fulfillment.

Order compensation is the process Order Management uses to modify a sales order so it accurately reflects your change. Assume you change the warehouse. Order compensation adjusts the order so it uses the different warehouse, updates delivery dates so they accurately reflect the time needed to ship the item from the different warehouse, and so on.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Revise Sales Orders That You Already Submitted](#)
- [Create Sales Orders](#)

Revise Sales Orders That You Already Submitted

If you must revise a sales order that you already submitted, create a new version of it, then edit the new version.

1. Go to **Home > Order Management > Order Management (New) > Sales Orders**.
2. If you know the sales order number, search for it on the Sales Orders page.

As an alternative, filter orders on the Sales Orders page:

Attribute	Value
Order Status	Processing

You can create a new version of a sales order only if its in Processing status or Closed status. You might not be able to modify some attributes in the new version after the sales order is Closed.

3. Click a **link** in the Order column.

4. Create a revision.

Order Management stops processing the sales order, creates a new draft that you can modify, and adds a version number in parentheses immediately after the order number to indicate each version you create.

Here's an example of version 2:

- 507412 (2)

5. Edit the sales order, then click **Submit Order**.

Order Management creates a new sales order and displays the new order number.

Order Management increments the version number each time you create a new version. You can view each version:

1. Search for and open the sales order.
2. Click **More Actions > View Revisions and Related Orders** on the order header.
3. Notice the versions. You can revise only the current version. You can't revise an earlier version.

For example, if you create a sales order and revise it, then Order Management displays (2) after the order number. If you revise it again, then Order Management displays (3). You can revise only version 3. You can't revise version 2.

Guidelines

- If Order Management doesn't immediately confirm the submit, wait a moment, then query for the order. Don't resubmit the sales order. If you resubmit, then Order Management will create another revision and start another orchestration process, which might cause an error because a separate orchestration process will run for each revision.
- You can't revise a sales order that you haven't submitted. Instead, edit the draft of the sales order.
- You can't retrieve a sales order version that you discard.

Revise the Order Header

- If you revise only the order header, then Order Management will revise the header but not the order lines.
- Order Management doesn't use values from the order header to set default values on order lines during a revision in some situations. If Order Management already shipped an order line, delivered it, or started invoicing for it, then you must revise the order line. For example, to revise payment terms, you must revise the Payment Term attribute on each order line.
- If you revise only an order line, then Order Management will use the order line attributes that you revise. It will set attribute values to empty for each attribute that you don't revise.
- If all of the order's order lines are closed or canceled, then you can't revise a value on the order header. If you do, then your sales order might get stuck in Draft status and you might encounter an error message that 's similar to `You can't update the sales order because all of its order lines are closed or canceled.`

Revise Shipped Lines

- You can't revise the price on an order line that Order Management already shipped.
- If Order Management splits an order line and ships part of the split line, then you can't cancel the quantity that you already shipped. If you must cancel that quantity, then create a new return line for that shipped quantity. If you also need to cancel the quantity that you haven't shipped, then create a revision and cancel the split line that has that unshipped quantity.

Update Attributes on Split Order Lines for Partial Shipments

You have different capabilities depending on whether you use the Update Attributes on Split Order Lines for Partial Shipments feature.

If Shipping already shipped part of the line, or if Receiving already received part of the return line, and if you:

Use the Feature	Don't Use the Feature
<p>You can revise the split line just like you do when you update attributes on a line that isn't split and that's Awaiting Shipping in a standard or back-to-back flow. However, you can't revise the Unit of Measure, Supplier, Supplier Site, Shipment Set, or the configuration for a configured item.</p> <p>You can update the attributes on the split line of a transfer order just like you do when you update attributes on a transfer order line that isn't split and that's Awaiting Shipping. However, you can't update the transfer order in Inventory Management.</p> <p>You can revise attributes on the split line in a drop shipment or return order just like you do when you don't use the feature.</p>	<p>You can revise only some of the attributes that don't identify change on a split line, such as payment terms or sales credits.</p> <p>You can't revise attributes that identify change, such as Quantity, Item, Warehouse, Supplier, Supplier Site, Requested Date, Scheduled Date, Shipment Set, and so on.</p> <p>You can't update any attribute in a transfer order.</p>
<p>If you enable the Use Flexfield Attributes option on your orchestration process, then you can update an extensible flexfield on a split line. The orchestration process compensates it's fulfillment tasks.</p> <p>You can do this in a standard or in a back-to-back flow but not with a drop shipment or a return order.</p>	<p>If you enable the Use Flexfield Attributes option, then you can't update an extensible flexfield on a split line.</p>

If you don't enable the Use Flexfield Attributes option, then you can change the value in the flexfield regardless of which fulfillment flow you're using or whether you use the feature.

You can't update attributes that identify change in these conditions regardless of whether or not you use the feature:

- The line contains a configured item and the item is out of proportion.
- The line is part of drop shipment that you partially shipped or is a return line that you partially received.

If you do one of these revisions and encounter an error, then discard your draft revision and create another one.

For details, see:

- [Update Attributes on Split Order Lines for Partial Shipments](#)
- [Manage Order Attributes That Identify Change](#)
- [How Configure-to-Order Works](#)
- [Track Supply for Partial Shipments](#)

Cancel

- You must explicitly request the cancel when you revise a sales order. Order Management doesn't implicitly cancel order lines.
- To cancel an order line that you haven't submitted, select the line then click **More Actions > Delete Line**.
- If you create a revision, don't save or submit your changes and then cancel, then Order Management still creates a draft of your revision. If you then query for the order, you will see two revisions of the order. The lower revision is in Processing status and the higher revision is in Draft status. Order Management will continue to process the version that's in Processing status and won't do anything with the version that's in Draft status.

Increase Quantity

If you increase the quantity on an order line while you're revising a sales order, and if Order Management split the original line because the original quantity wasn't available in inventory, and if your new quantity isn't available in inventory, then Order Management won't split the line and the line might remain in Scheduled status until the entire quantity is available.

Assume you create sales order 520530. You add an order line with a quantity of 10 and submit the order, but only 8 are available in inventory. Order Management splits the order line into two lines, x and y, x with a quantity of 8 and y with a quantity of 2. It sets the status for line x to Awaiting Shipping and sets the status for line y to Scheduled. Order Management does this so it can fulfill line x right away instead of waiting until the quantity of 10 is available in inventory.

Let's say you revise the sales order, increase the quantity on the order line to 12, and submit it. Order Management already shipped 8, so you now need to fulfill a quantity of 4, 2 for the original quantity that wasn't available plus 2 more for the quantity you just added.

Order Management won't split the line because it already scheduled part of the sales order in fulfillment, so your line will remain in Scheduled status until the entire quantity is available. You also might encounter an error message.

A reservation was not created because the reservation quantity is greater than the available-to-reserve quantity.

You can avoid this problem:

1. Go to the Order Management work area, search for, then open sales order 520530.
2. On the order page, click the order line that contains the quantity you must modify, then click **More Actions > Unschedule**.
3. Revise sales order 520530, set your new quantity on the order line, then submit.

Order Management will ship the quantity that's available in inventory. If 4 are available, it will ship all 4 in one line. If less than 4 are available, it will split the line, ship what's available on one line, then set the other line to Awaiting Shipping and fulfill it when the quantity is available in inventory.

For details, see [What's a Split Order Line](#).

Decrease Quantity

You can reduce the quantity on an order line that you already submitted but that Order Management hasn't already shipped. To do this, create an order revision, set the Quantity attribute on the order line to the quantity that you want to ship, then submit the order.

Don't modify the quantity on the order line. If you do, Order Management will move the quantity that you reduce to the Canceled Quantity attribute and will leave the Quantity on the order line at its original value, but that's probably not the behavior you want. Assume you set the Quantity on the order line to 100 and submit the order. Some time later, you reduce the quantity on the order line from 100 to 90. Order Management will set the Canceled Quantity to 10 and leave

the Quantity on the order line at 100. To avoid this problem, don't change the quantity on the order line. Instead, create a revision and set the Quantity on the order line in your revision to 90.

More

- Order Management doesn't cascade changes you make to an attribute from the order header to the order line.
- Order Management applies processing constraints when you modify any value in the tab header or detail. If a constraint prevents the change, then Order Management disallows the change and displays an error message. For example, if Order Management already started order fulfillment for the sales order, then you might need to cancel the sales order and create a new one. For details, see [Cancel Sales Orders](#).

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Cancel Sales Orders](#)
- [Return Sales Orders](#)
- [What's a Split Order Line](#)

Revise Configured Items

If you revise a sales orders that references a configured item, then make sure the change order that references the item includes all the order lines.

These order lines reference options for the configured item. You must also make sure the change order references these same items, then resubmit your change order.

For example, assume you create a sales order that includes six order lines. Some time later, you modify the date on only one order line, such as line 2. You must send all six lines of the sales order even if you modify only one line.

Assume Order Management displays a message:

- `Version 2 of change order 237864 is rejected because child order lines 3,4,7 of order line 2, of model PTO54222, are missing.`

In this example, the model identifies the configured item. It includes order line 2, but child order lines 3, 4, and 7 of line 2 are missing. You must make sure the change order includes these child order lines.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Cancel Sales Orders](#)
- [Return Sales Orders](#)

Cancel

Cancel Sales Orders

Cancel a sales order that's in Processing status.

- You can only cancel a sales order that's in Processing status. If the sales order is in Closed status or Partially Closed status, then you must return the sales order instead. For details, see [Return Sales Orders](#).
- Learn how to cancel a stuck order line. For details, see [Cancel Order Lines That Remain in Same Status](#).
- If you cancel, then Order Management immediately stops order fulfillment for the sales order and cancels it.

Cancel Remaining Quantity

If you set the Allow Partial Shipments of Lines option to Yes in the shipment details so Order Management can split the line during scheduling, and if Order Management has shipped only some of the split order lines, then you can click Cancel Remaining Quantity to cancel the quantity that Order Management hasn't shipped.

If your order line includes a split order line, and if Order Management splits the line when it ships the sales order, then Order Management partially fulfilled the sales order. You can't revise the part of the line that Order Management already fulfilled, but you can cancel the remaining quantity that it hasn't fulfilled.

Assume you use the Update Attributes on Split Order Lines for Partial Shipments feature. If the order line has a quantity of ten and Order Management ships seven of them, then you can increase the quantity or decrease it to any value of zero to three. You can also click Cancel Remaining Quantity to cancel the remaining quantity of three regardless of whether you use the feature. For details, see [Update Attributes on Split Order Lines for Partial Shipments](#).

Order Management does this processing even if it fulfills the sales order from more than one warehouse.

Example

Assume Order Management splits an order line during scheduling so it can fulfill the lines from three different warehouses, thus producing three split lines.

Order Management ships one of these lines. You can't cancel the shipped line, but you can cancel the two lines that Order Management hasn't shipped.

If you order a quantity of ten, then Order Management splits the sales order into three lines, and fulfills each line from these warehouses:

- Seven items from warehouse A
- Two items from warehouse B
- One item from warehouse C

Assume it ships seven items from warehouse A, but hasn't shipped any items from warehouse B or warehouse C. You can't cancel the items that Order Management shipped from warehouse A, but you can cancel two items from warehouse B, and one item from warehouse C.

Cancel Sales Order When It Has Lines That Aren't and Are Fulfilled

If a sales order has any order line that's fulfilled, then you can't cancel the order in the Order Management work area.

Assume your order has 3 order lines in these statuses:

- Line 1. Scheduled.
- Line 2. Awaiting Fulfillment.
- Line 3. Shipped.

You can't cancel the sales order because Order Management already fulfilled line 3. If you need to cancel lines 1 and 2, then create a revision, use the Cancel action on the order line to cancel lines 1 and 2, then submit the revision.

Guidelines for Canceling

Sales Order Status	Description
Draft	You can't cancel a sales order that's in Draft status. Delete it instead.
Processing	You can't delete a sales order that's in Processing status. Cancel it instead.
Awaiting Shipping	Your order administrator controls whether you can cancel a sales order that's awaiting shipping. For details, see Compensate Sales Orders That Are Awaiting Shipping .
Requisition is Created	This status happens only with drop ship or back-to-back shipping. Wait for the order line status to change to Awaiting Shipping, then cancel the line.
Awaiting Billing	You can't update or cancel an order line that's in the Awaiting Billing status.
Closed	You can't cancel an order line that's in Closed status. Return it instead. For details, see Return Sales Orders .

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Return Sales Orders](#)

Cancel Order Lines

Cancel an order line in a sales order you already submitted or that's still in draft.

Assume you submit sales order 508597 for customer Computer Service and Rentals with two order lines, but must cancel the order line for the AS16901 item. Here are the quantities:

- Quantity of 1 for item AS54888 - Standard Desktop
- Quantity of 1 for item AS16901 - Phone

Cancel the order line:

1. Go to the Order Management work area, then search for and open sales order 508597.

2. Create a revision.
3. Click **More Actions > Cancel Line** on line two.

Notice that the sales order sets new values for the attributes on the order line:

- o Quantity to 0
- o Amount to 0
- o Status to Cancellation Requested

4. Submit.

Cancel Lines That Are in Draft Status

Assume you create sales order 508597 but don't submit it. You instead save it to Draft status:

- Search for, then open sales order 508597.
- On the New Sales Order page, on line two, click **More Actions > Delete Line**.

Cancel Lines That Are Awaiting Billing

You can't update or cancel an order line that's in the Awaiting Billing status. You can only modify an extensible flexfield or attachment on the line. Instead, make sure the line is fulfilled or closed, then create a return order.

Cancel Lines That Are Shipped

You can't cancel an order line that's in the Shipped status. Instead, create a return order.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Return Sales Orders](#)

Return

Return Sales Orders

Return an item that you already shipped so you can move it from your customer back to your organization.

Return a sales order:

1. Go to the Order Management work area, then search for and open the order you want to return.
2. On the Order page, click **Enable Returns**.
3. Select values for each item that you must return:

Attribute	Description
Return Quantity	Enter a value up to the quantity that you originally ordered for the order line, minus the quantity of all prior returns for the item.

Attribute	Description
	<p>Assume you originally ordered 10 items and you returned four of them in a prior return. The returnable quantity is six, so you can return up to six items.</p>
Return Type	<p>Select a value:</p> <ul style="list-style-type: none"> ○ Cancel the Item. Cancel an item that doesn't include a shipment. For example, a contract for wireless phone service typically doesn't include a shipment. The customer can't physically return it, but you can cancel it. ○ Return for Credit. Return an item that typically ships to the customer but that the customer can't return for some reason. For example, the customer received the item but it was damaged, or the customer never received the shipment. ○ Return for Credit and Return Item. Return an item. <p>Note that you can't revise the Return Type after you submit the return.</p>

4. Submit.
5. Examine these attributes to get details about the return:

Attribute	Description for Return
Ship-to Contact	<p>Person at the organization who returns the item.</p> <p>Order Management sets Ship-to Contact to the contact at the organization who received the item in the original shipment.</p> <p>In this example, Ship-to Contact is a person at Computer Service and Rentals.</p> <p>You can modify this value when you create the return.</p>
Ship-to Customer	<p>Organization that's returning the item.</p> <p>Order Management sets Ship-to Customer to the organization who received the item in the original shipment.</p> <p>In this example, Ship-to Customer is Computer Service and Rentals.</p> <p>You can modify this value when you create the return.</p>
Ship-to Address	<p>Physical address of the organization or person who returns the item.</p> <p>Order Management sets Ship-to Address to the address that received the item in the original shipment.</p> <p>You can modify this value when you create the return. For example, the organization moved to another address since the original shipment was shipped.</p>

Attribute	Description for Return
Warehouse	<p>Warehouse that receives the return. We recommend that the customer send the return to this warehouse.</p> <p>Order Management sets Warehouse to the warehouse that shipping used to ship the original item.</p> <p>If some other supplier originally shipped the item, then Order Management doesn't set the value for the warehouse.</p> <p>You can select any warehouse from the list.</p>
Supplier	<p>Outsider supplier who originally shipped the item to the customer.</p> <p>Order Management sets Supplier to the outsider supplier who originally shipped the item to the customer.</p> <p>In this example, assume Vision Corporation is the outside supplier, so it sets Supplier to Vision Corporation.</p>
Supplier Site	<p>Physical address of the supplier who originally shipped the item to the customer.</p>

Order Management sets the values for several of these attributes when you create the return.

For example, assume your Computer Service and Rentals customer purchased and received a Standard 10000-S Tablet from you, Vision Corporation. Computer Service and Rentals determines that the tablet is defective and must return it.

6. Receive the return order.

If you receive the physical items that the customer returns as part of your job responsibilities, then you can use Oracle Inventory Management or Oracle Receiving to receive the return order. For details, see *Receive Returned Items*.

Conditions That Determine Whether You Can Return an Item

Each order line that you return must meet these conditions:

- Your order administrator must set up the item in the Product Management work area so it's returnable. For details, see *Guidelines for Processing Return Orders*.
- The order line that contains the item that you want to return must be fulfilled or closed. For details, see the Track Fulfillment Lines Through the Fulfillment Lifecycle subtopic in *Order Management Statuses*.
- The returnable quantity on the order line must be greater than zero. The returnable quantity is the quantity you ordered in the original sales order for an item, minus the quantity of all prior returns for this item from the original sales order.
- The order line that you need to return must not already be a return order line.

- If the item you're returning is a configured item, then you must return the entire item. You can't return only part of a configured item. Assume you purchase the AS54888 Desktop Computer, and configure it with the 24" Display configurable option and the T100 Wireless Mouse. You can't return only the display or the mouse. You must return the entire AS54888 computer, including the display and the mouse.
- If you're returning a subscription, and if the subscription is shippable, then your administrator must set up the item in Product Management so it's returnable. If it isn't shippable, then the administrator doesn't need to do this. For example, a subscription to a print magazine is shippable, but a subscription to a cellular plan isn't.
- If you're returning a coverage, then your administrator doesn't need to set up the item in Product Management so it's returnable.

If the item doesn't meet these conditions, then you can't return it, and the Enable Returns button might not be active.

Returns and Splits

If you create a return order but return only part of the quantity on an order line, then Order Management will split the line into lines x and y. Line x will have the quantity you returned and line y will have the quantity you didn't return. If you query the sales order you will see lines x and y, but you can't modify them except to cancel line y. For example, you can't modify the return reason on line y.

Assume your order line has a quantity of 10 and you return a quantity of 6. Order Management sends a quantity of 10 to Oracle Receiving, Receiving received only 6, so it sends a response to Order Management with the received quantity. Order Management splits the line into line 1-1 and line 1-2. Line 1-1 has a quantity of 6 and moves to the next step in the orchestration process. Line 1-2 has a quantity of 4 and is in a pending status.

You can't manually split a return.

Troubleshoot Returns

Trouble	Shoot
<p>I need to return a bill only item. I select the line that has the item, but the Return action is disabled.</p>	<p>Make sure the original line's status is Closed or the line is fulfilled. You can't return the line until it's closed or fulfilled. The fulfillment completion step determines whether it's fulfilled. Instead, create an unreferenced return and return the item on the unreferenced return. For more, see Return Items Without Original Sales Order.</p> <p>As an alternative, your order administrator can add a step to an orchestration process before the billing step and mark it as the fulfillment step. This fulfillment step makes sure Order Management fulfills the line before sending it to billing.</p>
<p>I encounter an error when I submit a return order.</p> <p>The value for the Bill-To Customer attribute depends on the Bill-To Contact attribute, but the Bill-To Contact isn't active.</p> <p>This problem might happen because the customer contact passed its end date sometime after you created the original order. For example, the contact might have left your company so an administrator deactivated the contact.</p>	<p>Try this.</p> <ol style="list-style-type: none"> 1. Save the return order. 2. Set the value for the Bill-To Contact on the order header. <p>Order Management filters these attributes so you can only select contacts that are currently active.</p> <ol style="list-style-type: none"> 3. Submit.

For more, see [Troubleshoot Order Management](#).

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Cancel Sales Orders](#)
- [Receive Returned Items](#)

Return Items Without Original Sales Order

Return an item when you don't have the original sales order.

Assume your customer Computer Service and Rentals must return one AS54888 desktop computer and 1 year of warranty coverage for the AS54888 because they ordered the wrong item, but the customer doesn't have the original receipt, and you can't locate the original sales order.

Try It

Order 521537
Draft
Business Unit: Vision Operations | Customer: Computer Service and Rentals | Order Total: 180.00 USD

Buttons: Copy Order, Enable Returns (Last updated 1 minute ago), Edit

Annotation: Edit, then Enable Returns

Business Unit: Vision Operations | Customer: Computer Service and Rentals | Bill-to Account Number: 1006 | Ship-to Address: 1800 Satellite Drive, Distribution Center, CHATTANOOGA, TN 37401

Additional order details

Outbound Lines: **Return Lines** (Click)

Search: Try line number, item details, line status, or warehouse

1 item | Copy Line | Update Lines | Expected Availability | More Actions

Annotations: Leave Empty (Original Order Reference), Save, then notice (Unreferenced Return Line)

Line	Item	Original Order Reference	Unreferenced Return Line	Return Quantity	Return Type	Return Reason
3	AS54888		Yes	1	Return for credit and return the item	Late Delivery

Here's what you do:

- Fill in attributes on the order header, then click **Enable Returns**.
- Add the item that you need to return on the Return Lines tab. Leave the Original Order Reference attribute empty. Set other attributes as necessary, such as Return Reason.
- Click **Apply > Save**, then notice that the Unreferenced Return Line attribute contains Yes.

Order Management calculates the credit amount:

- Uses attribute values from the order header to set default values for attributes on return lines.
- Sets the Billing Frequency attribute to One Time Billing.
- Sets the Number of Billing Periods attribute to 1.
- Prices the return line according to the price that exists on the date and time when you add the order line. For example, if your customer purchases the item on January 1, 2018 for \$2,300, returns it on January 1, 2019, and if the price on January 1, 2019 is \$2,500, then Order Management calculates the price at \$2,500.
- Recalculates the sales order price according to the pricing that exists on the date and time when you save or submit the sales order.
- Issues the entire credit to the customer instead of sending an individual credit for each period.

Note

- The return uses negative values to indicate it will credit the account.
- The order line doesn't include a reference to the original order.
- The order line uses an icon with a left facing truck to indicate a return.

You can't modify this behavior.

Example

1. Set values on the order header:

Attribute	Value
Customer	Computer Service and Rentals
Business Unit	Vision Operations
Bill-to Customer	Computer Service and Rentals Order Management uses billing attributes, such as Bill-to Customer, to calculate reverse billing instead of adding separate credit attributes to the sales order.
Bill-to Account	Computer Service and Rentals

2. Set values on the order line:

Attribute	Value
Item	AS54888 Display these attributes:

Attribute	Value
	<ul style="list-style-type: none"> ○ Return Location ○ Return Reason
Return Quantity	1
Return Type	<p>Return for credit and return the item</p> <p>Setting the Return Quantity attribute and the Return Type attribute is similar to returning an item that does reference the original sales order.</p> <p>For details, see Return Sales Orders.</p>
Return Reason	Customer ordered the wrong item.
Return Location	<p>V1 Vision Operations.</p> <p>The value you enter here will also display in the Shipment Details area, the Supply tab, the Warehouse attribute.</p>
Expected Receipt Date	The value you enter here will also display in the Shipment Details area, the Supply tab, and the Requested Date attribute.

Cancel Coverage or Subscription

Use these attributes only when you cancel a coverage or subscription:

- Sales Product Type. Displays the service item's type.
- Covered Item. Applies only to coverage.
- Duration.
- Period.
- Cancellation Effective Date.

If the subscription includes a physical item that you must return, such as the modem that's part of an internet access subscription, then you might need to specify some of these attributes and ship the item back to the warehouse:

- Expected Receipt Date. Order Management immediately sends the return electronically.
- Return Location. Order Management sends the return to an accounting system, not a physical location.

For example, add this row:

Attribute	Value
Item	ZOKC_COVG_MPA_Item

Attribute	Value
Covered Item	AS54888 Select the item that the coverage covers.
Return Quantity	1
Return Type	Cancel the Item
Return Reason	Customer ordered the wrong item.
Duration	1 Set the duration that remains on the coverage that the customer hasn't consumed.
Period	Year Set the period, such as Year, that measures duration.
Cancellation Effective Date	Date when the cancel starts.
Return Location	Leave empty.
Expected Receipt Date	Leave empty.

Set Duration and Period

Setting duration and period depends on the type of coverage or subscription you set in the Item attribute. Your order administrator defines each item, type of duration, and values for duration period:

Type of Duration	Description
Fixed	Order Management sets the value for the return according to how your order administrator sets up the item. You can't modify duration or period.
Variable	Order Management sets the value for the return according to how your order administrator sets up the item. You can modify duration or period. You must not leave them empty.
Open Ended	Duration is optional. You must set Period for a coverage item, or when you set Duration.

Return Kit

If you return a kit, then Order Management adds the kit and the included items on the same order line.

A kit contains included items. For example, DOO_KIT-DOO Kit Item is a kit, and it contains these items:

- KB42047 Power Cord
KB86324 Packing Materials

You can't add a kit to an order line and then, on the same line, select included items to return. Instead, you can create a separate unreferenced return line for each included item.

If the item is a configured item, then Order Management adds included items for each kit according to the item's structure that you set up in the Product Management work area.

Copy Sales Orders

You can copy a sales order that includes return items that don't reference the original sales order. The copy will include unreferenced return lines. It won't include lines that do reference an original sales order:

1. On the Order page, click **Actions > Copy**.

2. In the Copy dialog, add a check mark to Unreferenced Return Lines:

The screenshot displays the Oracle Order Management interface for Order 522010. At the top, the Oracle logo is visible. The order title "Order 522010" is prominently displayed, followed by the status "Draft". Below this, the business unit "Vision Operations", customer "Computer Service and Rentals", and order total "3 546.00 USD" are shown. The main content area includes fields for "Business Unit" (Vision Operations), "Customer" (Computer Service and Rentals), and "Bill-to Account Number" (1006). A section titled "Additional order details" contains a search bar with the placeholder text "Try line number, item details, line status, or warehouse". Below the search bar, there are four items, a "Copy Line" button, an "Update Lines" button, an "Expected Availability" button, and a "More Actions" dropdown menu. A table lists the items with columns for checkboxes, Line, Item, Quantity, UOM, and Requested Date.

<input type="checkbox"/>	Line	Item	Quantity	UOM	Requested Date
<input type="checkbox"/>	4	HD Monitor	1	Each	11/18/25 8:09 PM
<input type="checkbox"/>	3	Basic Mouse	1	Each	11/18/25 8:09 PM

The setup that your administrator makes might affect what Order Management copies. For details, see [Allow Users to Return Items Without Original Sales Orders](#).

Receive Returned Items

A user in the warehouse typically receives a returned item. However, you can use Oracle Inventory Management or Oracle Receiving and Order Management to receive the items that a return order references.

Summary of the Steps

1. Receive the item.
2. Verify that Order Management updated the order status.
3. Create a credit for the return.
4. Verify that receivables credited the invoice.

Receive the Item

1. Create a return order for the items you must receive.
You must create the return order before you can receive the items. For details, see *Return Sales Orders*.
2. Sign into an Oracle Application with order administrator or order manager privileges.
You must use these privileges to do this procedure.
3. Go to the Inventory Management work area, then click **Tasks**.
4. Set Show Tasks to Receipts, then click **Receive Expected Shipments**.
5. On the Receipts page, in the Search area, set the values, then click **Search**:

Attribute	Value
Document Type	Return Material Authorization
Document Number	Enter the return order number. For example, enter 258206.

6. In the search results, click the **line** that includes your return order, then click **Receive**.
7. Create the receipt:
 - o In the Receive Lines list, set values, then click **Create Receipt**:

Attribute	Value
Quantity	Enter the quantity you received at the loading dock in the warehouse.
Received By	Enter your name.

- o On the Create Receipt page, submit.
- o In the Confirmation dialog, note the receipt number, then click **OK**.
- o Examine the contents of the box that includes the items you received. Make sure they match the Item Description.
- o On the Receipts page, click **Put Away Receipts**.
Put Away Receipts moves the returned item to a storage location in the warehouse.
- o On the Put Away Receipts page, in the Advanced Search area, in the Receipt attribute, enter the number you noted earlier in this procedure, then click **Search**.
- o In the search results, click **Put Away**.
- o In the Put Away Lines page, set the value, then submit:

Attribute	Value
Subinventory	Enter a value that describes where you're physically placing the returned item. For example, enter Stores.

Attribute	Value

- Run the *Send Receipt Confirmation* scheduled process.

This scheduled process gets the latest receiving status from the receiving system, then imports it into Order Management.

In the Process Details dialog, set the parameters:

Parameter	Value
Organization	Select the organization that identifies the customer. This value is typically the Business Unit from the sales order, such as Vision Operations.
Source System	Select the source system that Order Management uses. For example, select GPR.
Source Order Number	Optional. Enter the return order number. For example, enter 258206. You can enter a value in the Source Order Number parameter or in the Receipt parameter.
Receipt	Optional. Enter the receipt number you noted earlier in this procedure.

- Make sure the Status attribute for the scheduled process displays Succeeded.

Verify That Order Management Updated the Order Status

- Go to the Order Management work area and query for your return order.
For example, query for order 258206.
- On the Order page, verify that the status for the sales order is Awaiting Billing.

Create a Credit for the Return

- Run the Import AutoInvoice scheduled process. In the Process Details dialog, set these parameters:

Parameter	Value
Transaction Source	Select Distributed Order Orchestration.
From Sales Order Number	Enter the return order number. For example, enter 258206.
To Sales Order Number	Enter the return order number. For example, enter 258206.

For details, see [Update Intercompany Receivables Invoice Import Details](#).

2. Make sure the Status attribute for the Import AutoInvoice scheduled process displays Succeeded.

If the list includes the Import AutoInvoice: Execution Report scheduled process, then ignore it.

3. Verify that Order Management updated the order status for the return. Make sure the status for the return order line in the Order Management work area is Closed.

Verify That Receivables Credited the Invoice

1. Go to **Home > Order Management (New) > Manage Fulfillment Lines**.
2. Search for your fulfillment line, then click **Actions > View Fulfillment Details**.
3. In the Fulfillment Details dialog, click **Billing**, then make sure the value in the Invoice Amount field includes a reduction that's equal to the return amount.

For example, if the Total of the original order was \$500, and if the return amount is \$200, then make sure the Invoice Amount displays a value of \$300.

Receive Drop Shipment

You can't return a drop shipment directly to the supplier. You must return the item to an inventory first, and then return it to the supplier.

Do the steps described above, then return the item to the supplier:

1. Go to the Inventory Management work area.
2. Click **Tasks > Show Tasks > Receipts**.
3. Click **Return Receipts**.
4. In the Select Organization dialog, select the same organization that you set as the business unit on the sales order, such as Vision Operations.
5. On the Return Receipts page, search for the purchase order that you used to purchase the item from the drop ship supplier.
6. In the search results, click the **line** that contains the item you're returning, then click **Return**.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Cancel Sales Orders](#)
- [Return Sales Orders](#)

Return a Drop Shipment

You can't return a drop shipment directly to the supplier. You must return the item to inventory first, and then return it to the supplier.

1. Create a return order like you normally would for a sales order that isn't a drop shipment, but with a few differences:

- o Make sure the status for each order line that you're returning is Awaiting Billing or Shipped.
- o Set this attribute:

Attribute	Value
Request Type	Arrive On

- o On the order line, set the Return Location attribute to a warehouse that can send the item to your supplier.

For details, see [Return Sales Orders](#).

2. Receive the returned item into inventory.

For details, see [Receive Returned Items](#).

3. Return the item to your supplier.

Do this step to make sure that the warehouse returns the item to your supplier and depletes the quantity that you returned to inventory:

- o Make sure you have the privileges that you need to use Oracle Inventory Management. For details, see [Get the Privileges That You Need to Implement Order Management](#).
- o Go to the Inventory Management work area.
- o Click **Tasks > Show Tasks > Receipts**.
- o Click **Return Receipts**.
- o In the Select Organization dialog, select the same organization that you set as the business unit on the sales order, such as Vision Operations.
- o On the Return Receipts page, search for the purchase order that you used to purchase the item from the drop ship supplier.
- o In the search results, click the **line** that contains the item you're returning, then click **Return**.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Return Sales Orders](#)
- [Receive Returned Items](#)
- [Get the Privileges That You Need to Implement Order Management](#)

Return and Replace Items During Drop Shipment

Learn how to return and replace a defective item in a drop shipment.

Assume you have a drop shipment where your Computer Service and Rentals customer places sales order 111323 for the AS54888 Desktop Computer from you. Your supplier, Green Corp, uses purchase order 88659 to ship and deliver the

AS54888 to your customer from their warehouse. Your customer finds that the item is defective and returns it with a request for a replacement.

Try it:

1. Process the return for order 111323 like you normally do when you return an item in a drop shipment. Set the Return Type on the order line to Return for Credit and Return the Item, and Order Management will issue a credit memo for the line. For details, see *Return Sales Orders* and *Receive Returned Items*.
2. Create a new sales order and set the value on the order header:

Attribute	Value
Purchase Order	88659

As an option, adding the purchase order helps you track the replacement with the original order.

3. Add an order line. To specify the supplier that you use, set the values on the line:

Attribute	Value
Item	AS54888
Supplier	Green Corp

4. Submit the sales order.

Order Management will create a new purchase order for the drop shipment.

5. Close or cancel the purchase order.

Green Corp will send an advanced shipment notice for the entire quantity on the purchase order to Procurement, and Procurement automatically closes the purchase order and sets its status to Closed for Receiving.

To manually close the purchase order, you can create an invoice for the entire quantity on the purchase order. Procurement will close the purchase order and set its status to Closed for Invoicing.

You can also manually close it in the Purchase Orders work area:

- o Make sure you have the privileges that you need to manage orders in Oracle Procurement. For details, see *Get the Privileges That You Need to Implement Order Management*.
- o Go to the Purchase Orders work area.
- o Click **Tasks > Manage Orders**.
- o On the Manage Orders page, search for your purchase order:

Attribute	Value
Purchase Order	88659

- In the search results, in the Order attribute, click **88659**.
- On the Purchase Order page, click **Actions > Close**.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Cancel Sales Orders](#)
- [Return Sales Orders](#)
- [Receive Returned Items](#)
- [Get the Privileges That You Need to Implement Order Management](#)

6 Fulfill Sales Orders

Monitor

Order Management Statuses

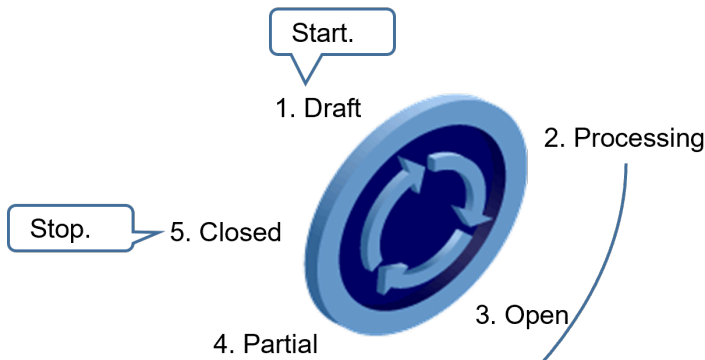
Use the Order Management statuses to monitor fulfillment for your sales order.

- Order Management displays a separate status for the sales order, order line, fulfillment task, and orchestration process.
- Each status indicates the progress of a sales order from beginning to end.
- The statuses of the order lines, orchestration processes, and fulfillment tasks determine the sales order status.
- You can use the Order Management work area to view the statuses.

Order Management sequentially evaluates each of the status conditions that an order line contains while it processes your sales order. Order Management uses the order line status that has moved the furthest in the sales order's life cycle to update the order status.

Sales Order Status

Your sales order goes through this sequence:



Order 522172 ... Create Revision
Processing Last updated 49 seconds

Business Unit Vision Operations Customer Computer Service and Rentals Order Total 3 006.00 USD

Business Unit: Vision Operations Customer: Computer Service and Rentals Bill-to Account Number: 1006

Ship-to Address: 1800 Satellite Drive, Distribution Center, CHATTANOOGA, TN 37401

[Additional order details](#)

Sales order status depends on the order line status:

Sequence	Sales Order Status	Description
1	Draft	You clicked Save to save the order to the database but haven't clicked Submit to submit it to order fulfillment. You can modify a Draft order. Draft displays only if you save your work. If you create a sales order without saving it, but submit instead, then the status goes to Processing.
2	Approval Pending	Order Management sent your sales order to a sales order approver. This status displays after you submit, but only if your order administrator set up approvals. For details, see Get Approvals for Sales Orders .
3	Processing	You clicked Submit, but Order Management hasn't delivered all order lines to the customer.

Sequence	Sales Order Status	Description
		You can't modify a Processing order, but you can revise it. For details, see Revise Sales Orders That You Already Submitted .
4	Open	Order Management hasn't completed any order lines.
5	Partial	Order Management has completed some, but not all, order lines.
6	Closed	Order Management completed all order lines. You can't modify a Closed order, but you can create a return order to return items from it. For details, see Return Sales Orders .

Order Management might display some statuses only infrequently or never. For example, if your fulfillment system fulfills the order lines in a matter of seconds, then Order Management might not display the Open status or the Partial status at all. The status might go directly from Processing to Closed.

Your status might also display one of these values:

Sales Order Status	Description
Reference	An earlier version of a revised order. For example, if you revise an existing sales order, then submit, then Order Management displays the earlier version of the sales order with a status of Reference. You can use sales orders that are in Reference status as an audit trail. Use them to see what the attribute values are for each version.
Canceled	Order Management canceled all order lines. It also removed the sales order from order fulfillment and didn't reschedule it. You can't submit a Canceled sales order to order fulfillment. If Order Management canceled only some order lines, then it ignores the canceled order lines, and sets the status according to the order lines that are open.

Where Order Management Displays Your Status

Status	Where Displayed
Order Status	At the top of the order page in the order title. For example, the order status of this sales order is Processing.
Order Line Status	On the order line. For example, Awaiting Shipping.

Status	Where Displayed
Orchestration Process Status	In the Status field of the Orchestration Process page. For example, Awaiting Fulfillment.
Fulfillment Task Status	In the Status column of the Orchestration Plan tab of the Orchestration Process page. For example, Awaiting Fulfillment.

Order Line Status

Order Line Status Before You Submit	Order Line Status After You Submit
Open	Order Management hasn't finished any order lines.
Partial	Order Management has finished some, but not all, order lines.
Closed	Order Management finished all order lines. If the status of all the order lines in a sales order is Closed or Canceled, then you can't modify the Primary Salesperson attribute on order header.
Canceled	Order Management canceled all order lines. If Order Management canceled only some order lines, then it ignores the canceled order lines, and sets the status according to the order lines that are open.

Track Order Lines Through the Fulfillment Lifecycle

1. Go to the Order Management work area, search for, then open the order line that has your item.
2. Notice that the Line Status attribute contains one of these values:
 - o Not Started
 - o Scheduled
 - o Shipped
 - o Awaiting Billing
 - o Billed
 - o Closed

Your order line proceeds through each status sequentially during the fulfillment lifecycle.

If you cancel the order line, then the status is Canceled.

Backorder

A sales order might go into backorder.

Order Management uses the Scheduled Ship Date to determine how long the order has been on backorder. For example, if the Scheduled Ship Date happened five days ago but Order Management hasn't shipped the order because inventory for an item isn't available, then the order has been on backorder for five days.

Orders on Backorder in the Order Management work area indicates how long each sales order has been on backorder. If the Scheduled Ship Date happens before the current date, and if inventory isn't available, then the Orders on Backorder area might use the Less Than 1 Day bar to indicate that the order has been on backorder for less than a day. The order will remain on this bar until Order Management ships the order, or until the Scheduled Ship Date happens at least one day after the current date.

Assume today's date is February 1 and the Scheduled Ship Date is February 6. The order will remain in Less Than 1 Day until February 7. If Order Management hasn't shipped the order by February 7, then the Orders on Backorder area will include the order in 1 to 3 Days.

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Revise Sales Orders That You Already Submitted](#)
- [Orchestration Process Status](#)
- [Set Up Fulfillment Line Status](#)

Why Order Management Disables Order Line Actions

The Order Management work area disables some of the order line actions that you can do under certain situations.

Action	When Disabled
All order line actions, except view	<ul style="list-style-type: none"> • The order line is locked, canceled, closed, was shipped, or is part of a configured item. • The user request status is processing. • Order Management hasn't assigned an orchestration process to the order line.
Unschedule	<ul style="list-style-type: none"> • The order line isn't scheduled. • The scheduled ship date is empty.
Reserve	<ul style="list-style-type: none"> • The order line isn't scheduled. • The Scheduled Ship Date is empty. • The order line is reserved. • The reserved quantity contains a value.
Unreserve	<ul style="list-style-type: none"> • The order line is reserved. • The reserved quantity is empty.
Substitute	<ul style="list-style-type: none"> • You selected more than one order line, but they don't all reference the same item. • The Substitute Allowed feature equals False for the order line, and you didn't sign in with the privileges that you need to override this restriction. • The order line is part of a configured item.

Action	When Disabled
	<ul style="list-style-type: none">The order line is part of a shipment set.
Release Hold	The order line isn't on hold.
Split Line	<ul style="list-style-type: none">The order line belongs to a shipment set.The Split Allowed feature equals False for the order line, and you didn't sign in with the privileges that you need to override this restriction.You selected more than one order line.

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Fix Problems and Improve Performance](#)

Monitor Jeopardy

There are different ways to monitor jeopardy.

- Search for your order, then drill down.
- Use one of the manage tasks, such as Manage Orders or Manage Orchestration Processes.

Here's the orchestration process you will examine in this example:

Orchestration Process: ShipOrderGenericProcess - 1(...

Customer Computer Service **Jeopardy Score** 300
 Registry ID 1006 **Jeopardy Reason** Schedule: Required Completion Date 02/06/10 12:00 AM, Expected Completion Date 02/19/10 4:09 AM, Schedule
 Order 46024 **Jeopardy Priority** High

Examine values.

Orchestration Plan **Fulfillment Lines**

View ▾ Examine status and progress.

Task Progress	Task	Status	Feb 14, '10					
			02-17	02-18	02-19	02-20	02-21	
	Schedule	Scheduled						
	Reserve	Reserved						
	Ship	Shipped						
	Invoice	Awaiting Billing						

In Jeopardy - Low

Mouse over to see jeopardy.

- On Time
- In jeopardy - high
- Complete
- In jeopardy - medium
- In jeopardy - low
- Summary

Orchestration Process

Order Fulfillment

1. Go to the Order Management work area, then click **View All Actions > Manage Orchestration Processes**.
2. On the Manage Orchestration Processes page, click Add Fields, then add these fields:
 - o Jeopardy Priority
 - o Jeopardy Reason
 - o Jeopardy Score

Add these fields so you can search on any aspect of jeopardy.

3. Assume you examine all orchestration processes that are in High jeopardy as part of your daily routine. So, enter these values, then click **Search**:

Attribute	Value
Jeopardy Priority	High
Orchestration Process Number	Does Not Contain x Enter any alphabetic text. The Orchestration Process number is numeric, so using Does Not Contain x will return all Orchestration Processes where Jeopardy Priority is High.

4. In the search results, in the Orchestration Process Number column, click a number, such as **100000016283267**.
5. On the Orchestration Process page, examine values in the jeopardy attributes in the header area:

Attribute	Value
Jeopardy Score	300
Jeopardy Reason	Schedule: Required Completion Date 02/06/10 12:00 AM, Expected Completion Date 02/19/10 4:09 AM, Schedule
Jeopardy Priority	High

6. Examine the orchestration plan:
 - o Notice that the schedule, reserve, and ship tasks are complete, and the invoice task is in low jeopardy.
 - o But Jeopardy Priority and Jeopardy Score are high for the orchestration process.
 - o The Jeopardy Reason describes why the orchestration process is in jeopardy. In this example, it looks like the Expected Completion Date happens 12 days after the Required Completion Date. That's not good if your customer really needs it on the required date.

So, even though none of the tasks are in high jeopardy, the orchestration process is in jeopardy because of some other condition.

 - o Jeopardy conditions for your orchestration process might be significantly different depending on how your order administrator sets up jeopardy.

Here's another example:

Orchestration Process: DOO_OrderFulfillmentGeneric...

Customer Computer Associates International

Registry ID 300100004591329

Order 532826

Jeopardy Score 545

Jeopardy Reason Invoice: Required Completion Date 04/25/18 8:08 PM, Expected Completion Date 02/23/19 7:39 AM, Create Invoice

Jeopardy Priority High

Orchestration Plan **Fulfillment Lines**



View ▾

Task Progress	Task	Status	Feb 17, '19		
			02-21	02-22	02-23
✓	Schedule	Scheduled		█	
✓	Reserve	Reserved		█	
⚠	Ship	Awaiting Shipping		█	
⚠	Invoice	Not Started			█

In Jeopardy - High

Why is shipping late?

Examine tasks in High jeopardy.

Attribute	Value
Jeopardy Score	545
Jeopardy Reason	Invoice: Required Completion Date 04/25/18 8:08 PM, Expected Completion Date 02/23/19 7:39 AM, Create Invoice
Jeopardy Priority	High

Note

- The ship and the invoice tasks are in high jeopardy.

- Its likely that the delay in the ship task is causing a delay in the invoice task.

Each jeopardy scenario is different. You might need to explore why a task is in jeopardy.

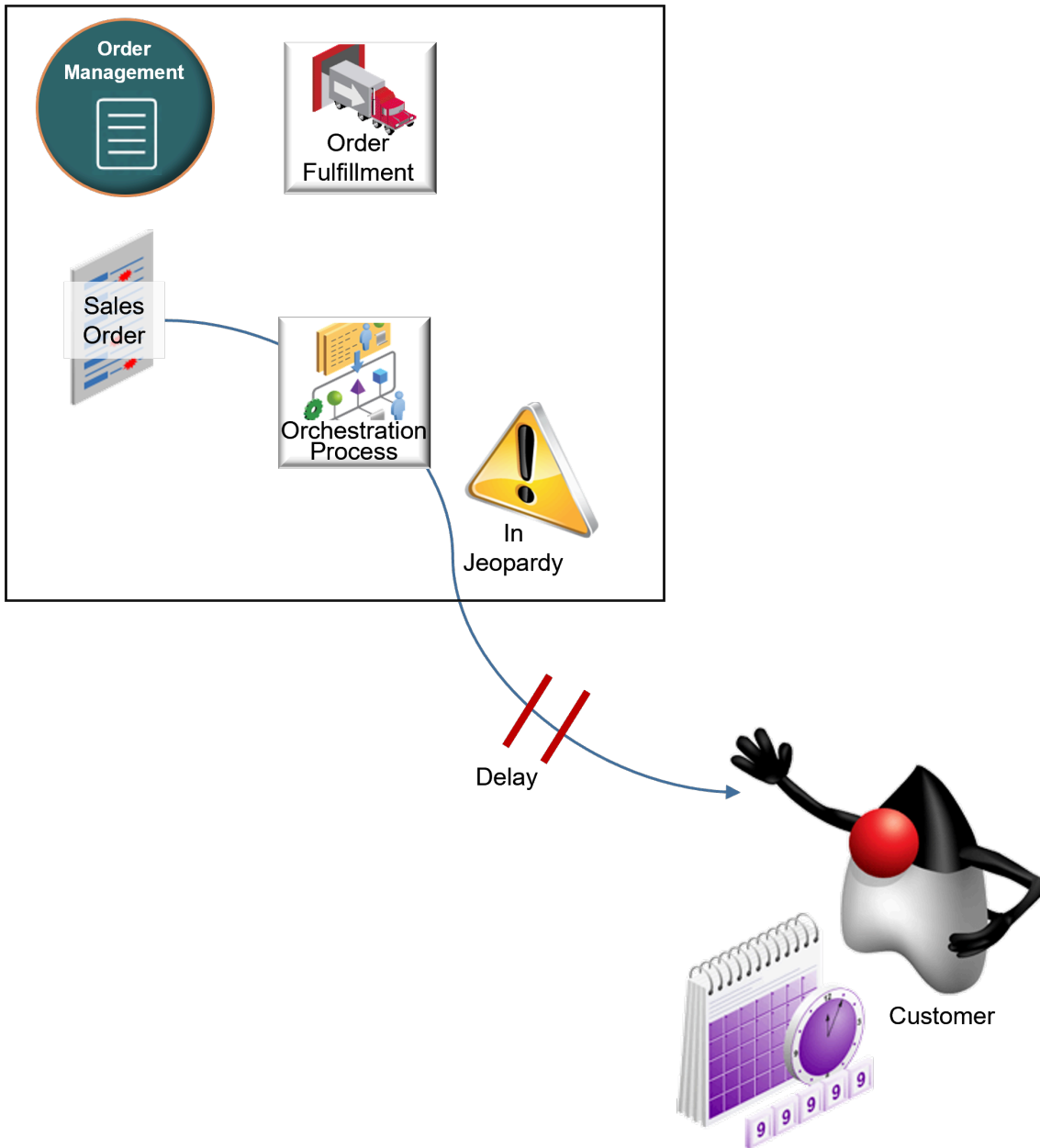
Related Topics

- [How Order Management Fulfills Order Lines](#)

Jeopardy Score

Use jeopardy to get a quick visual cue of the likelihood that a fulfillment task will delay fulfillment, and then take action to reduce delay.

Jeopardy indicates whether the orchestration process that's processing order lines for the sales order is at risk of not meeting your customer's requested delivery date:



You can use jeopardy in Order Management to help prevent delayed delivery. Consider these concepts:

Concept	Description
Jeopardy	The level of risk that the delay of an orchestration process task might cause to meeting fulfillment dates. Jeopardy can be low, medium, or high.
Jeopardy score	A numeric ranking that indicates the severity of a delay in meeting fulfillment dates.
Jeopardy priority	A value that describes the level of risk that's associated with delaying a fulfillment task.

Concept	Description
	Jeopardy priority can be low, medium, or high.

Note

- Order Management uses forward planning and backward planning across an orchestration process to calculate promise dates for each orchestration process task. If one of these tasks is delayed, then Order Management uses jeopardy to indicate the severity of the delay.
- Order Management calculates jeopardy score and jeopardy priority every time it plans or replans an orchestration process.
- Order Management uses the lead time of each orchestration process step and the dates from the sales order, such as required completion date, when it plans an orchestration process and assigns it to the sales order.
- Each fulfillment task includes a planned start date and a completion date.
- If a fulfillment task is delayed, then Order Management replans the entire orchestration process.
- If Order Management expects that a fulfillment task will finish after the required completion date of the task, then it assigns a jeopardy score to each fulfillment task according to the jeopardy threshold.
- Order Management maps jeopardy score to jeopardy priority, then displays the priority in the Order Management work area.

Jeopardy Priority

Jeopardy priority measures the fulfillment task that contains the highest jeopardy score. If more than one fulfillment task in an orchestration process is in jeopardy of not finishing on time, then Order Management uses the highest jeopardy score when it displays jeopardy for the orchestration process.

Assume supply in the warehouse that the Carpet Processing orchestration process references isn't sufficient to fulfill the order line, so it causes delays:

- A three day delay for the Deliver Carpet task that results in a jeopardy score of 100 and a jeopardy priority of Medium
- A three day delay for the Invoice Carpet task that results in a jeopardy score of 200 and a jeopardy priority of High

Two hundred is the higher score, so Order Management uses the jeopardy score for the Invoice Carpet task as the jeopardy for the Carpet Processing orchestration process. The Order Management work area displays a jeopardy priority of High.

Jeopardy Score for Fulfillment Tasks

Order Management assigns a jeopardy score to a fulfillment task according to the jeopardy threshold. If a fulfillment task is delayed, then Order Management calculates the difference between the required completion date and the planned completion date for the task, then searches for a threshold that applies to the largest number of entities that the fulfillment task references. Here's the sequence it uses when it searches for the threshold.

1. Search the process name, process version, task name, and task type.
2. Search the process name, process version, and task name.
3. Search the process name and task name.
4. Search the process name, process version, and task type.
5. Search the process name and task type.
6. Search the process task name.

7. Search the process name and process version.
8. Search the process name.
9. Search the task type.

For example:

1. Search for a jeopardy threshold that applies to the task type, task name, process name, and process version. If Order Management doesn't find a threshold that applies to all of these attributes, then continue to step 2.
2. Search for a jeopardy threshold that applies to the process name, process version, and task name. If Order Management doesn't find a threshold that applies to all of these attributes, then continue to step 3.
3. And so on.

Order Management continues this process until it finds a threshold that applies to one attribute or a combination of attributes, then sets jeopardy score according to the threshold that it assigns to the fulfillment task.

Jeopardy score might change during replanning. If replanning results in a change to jeopardy priority, and if the jeopardy priority value is enabled, then Order Management updates the jeopardy values.

Your order administrator sets up jeopardy, including thresholds that affect jeopardy score.

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Jeopardy Priority](#)
- [Jeopardy Threshold](#)
- [Set Up Jeopardy and Lead Time to Manage Delay](#)

Monitor Order Fulfillment

Monitor and manage order fulfillment for each of your sales orders.

If you modify an order line, then Order Management usually modifies the orchestration process that processes the order line. A modification might include a manual change or an automatic change, such as a change order, edit to an order line attribute, or rescheduling. Order Management evaluates your modification and determines the adjustments it must make to accommodate the change.

To monitor fulfillment, go to **Home > Order Management > Order Management (New) > View All Actions**, then select one:

- Manage Orders
- Manage Fulfillment Lines
- Manage Return Fulfillment Lines
- Manage Fulfillment Line Exceptions
- Manage Orders in Error
- Manage Order Orchestration Messages
- Manage Orchestration Processes

In this example, click **Manage Orders**, then search for and open a sales order:

1. Use the fulfillment view to monitor and manage order fulfillment. It displays the results of the order transformation, such as the order lines and orchestration processes that Order Management added to fulfill your sales order.

2. On the Fulfillment Lines tab, notice that Order Management added a separate order line for each order line you created, and that each order line includes details about the order status and orchestration process:

Order Fulfillment

Order Lines Fulfillment Lines Returns

Orchestration Process

Actions ▾

Fulfillment Line	Customer	Item Description	Source Order	Order Line	Orchestration Process Number	Status
▶ 1-1	Computer Service	Desktop Chassis	422080	1	300100090333478	Not Started
▶ 2-1	Computer Service	Monitor - 19"	422080	2	300100090333457	Not Started

Notice your line.

Click here.

For details, see [How Order Management Converts Source Orders Into Sales Orders](#).

3. Click an **orchestration process number**, such as 300100090333478.

- On the Orchestration Plan tab, examine the fulfillment tasks that the orchestration process scheduled to fulfill the order line, and the current status of each fulfillment task.

Here's an example where the jeopardy is low for each fulfillment task:

Task Progress	Task	Status	Planned Start Date	Jan 3, '16	
				01-06	01-07
	Schedule	Not Started	1/7/16 12:39 AM		
	Reserve	Not Started	1/7/16 1:39 AM		
	Ship	Not Started	1/7/16 2:39 AM		
	Invoice	Not Started	1/8/16 3:39 AM		

Legend:

- On Time (Blue)
- Complete (Green)
- Summary (Grey)
- On Hold (Hatched)
- In jeopardy - high (Red)
- In jeopardy - medium (Orange)
- In jeopardy - low (Yellow)

Note

- None of the tasks have started.
- The orchestration process might not start a fulfillment task for a number of reasons, such as the Planned Start Date hasn't happened, the Earliest Acceptable Ship Date might happen too far in the future, or other sales orders might have higher priority.
- For details, see [Fix Problems and Improve Performance](#).

Monitor Orchestration Plan

Let's take a more detailed look at another orchestration plan. An orchestration plan is a stepwise process that orchestrates and plans the fulfillment of a sales order:

- It includes tasks, task statuses, planning dates, planning shipments, and so on.

- It might require anywhere from seconds to days to complete the tasks that it contains during orchestration planning.

For example, if the customer purchases an item that isn't shippable, such as a subscription that ships electronically, then the shipment might finish in a few minutes. If the item is shippable, such as a laptop computer that a truck delivers to the customer, then the shipment might require several days to finish.

Here's an example orchestration plan that has completed all fulfillment tasks for the sales order up to the Invoice fulfillment task, and is now waiting for billing to invoice the sales order:

Task Progress	Task	Status
✓ Done.	Schedule	Scheduled
✓	Reserve	Reserved
✓	Verify Trade Compliance	Passed
✓	Transportation Planning	Transportation Planning Request Accepted
✓	Ship	Shipped
✓	Pause	Completed
☐	Invoice	Awaiting Billing

A check mark indicates that the fulfillment task finished. Your orchestration plan might display different fulfillment tasks and task statuses, depending on how your order administrator sets up Order Management.

This example orchestration plan includes these fulfillment tasks:

Fulfillment Task	Description
Schedule	Sends a scheduling request to order promising. For example, to schedule a sales order, unschedule a sales order, or to check availability of the item.

Fulfillment Task	Description
Reserve	Sends a reservation request to the inventory fulfillment system. A reservation reserves the supply for a sales order so no other sales order or system can use this supply.
Verify Trade Compliance	Performs trade compliance screening. Your order manager might administer Order Management to screen each sales order for trade compliance during order fulfillment. For details, see <i>Manage Sales Orders That Require Trade Compliance Screening</i> .
Transportation Planning	Sends a request to Transportation Management to plan transportation for the sales order.
Ship	Sends a request to the fulfillment system that creates the shipment request. The shipping system might send fulfillment line details to Order Management at any time when a status update happens, including before it confirms a shipment. For example, it sends updated details for attributes that display on the Fulfillment Lines tab: <ul style="list-style-type: none"> • Scheduled Ship Date • Scheduled Arrival Date • Actual Ship Date • Actual Delivery Date (Shipping) • Actual Delivery Date (Oracle Transportation Planning)
Pause	Waits for shipment delivery confirmation. A pause task can temporarily stop an orchestration process from running so it can wait for fulfillment to meet a condition.
Invoice	Sends a request to the billing system and interprets the replies that it receives from this system.

Order Management doesn't update the orchestration plan if you take any of these actions:

- Manually split an order line.
- Remove an order line from a shipment set.
- Change the warehouse.
- Substitute an item.
- Override the scheduled ship date.

For example, if you change the quantity on the order line from 10 to 100, then Order Management updates the Reserve step in the orchestration plan to make sure it can deliver the order line on schedule. However, if you change the warehouse, then Order Management doesn't update the Reserve step.

Monitor Assets

Depending on how your order administrator sets up Order Management, you can view the Asset Tracked attribute to monitor assets during order fulfillment. This attribute can contain one of these values:

Value	Description
Customer Asset	<p>Track the item as an asset only when you sell, lease, or loan it to your customer.</p> <p>Oracle Applications will track each subsequent change to the item, such as a change to location, ownership change, or a structural change. This tracking continues until the asset retires or the customer returns it, for example, at the end of a lease.</p>
Full Lifecycle	<p>Track the item as an asset when it enters an Oracle application. A purchase receipt, manufacturing completion, or some other type of receipt starts the creation of the asset.</p> <p>Oracle Applications will track each subsequent change until the asset retires, such as a change to location, ownership change, or a structural change.</p> <p>If an asset doesn't reference a serial number, then Full Lifecycle tracking is equivalent to Customer Asset tracking.</p>
Not Tracked	Don't track the item as an asset.

View Fulfillment Details

The Fulfillment Line page displays a lot of fulfillment detail, but there are some attributes that it doesn't display directly on the page. You can get details for some of these attributes.

1. Go to **Home > Order Management (New) > Manage Orders**.
2. Search for and open your sales order, then click **> Manage Fulfillment Lines**.
3. Search for your fulfillment line, then click it in the search result, such as 1-1.
4. On the Fulfillment Line page, click **Actions > View Fulfillment Details**.
5. Use the Fulfillment Details dialog to get the details that you need.

Area of Interest	Attribute
Shipping	<ul style="list-style-type: none"> • Bill of Lading • Tracking Number • Waybill Number • Quantity • UOM • Delivery • Status • Secondary Quantity • Secondary UOM • Transaction Date • Additional Information
Billing	<ul style="list-style-type: none"> • Receivables Business Unit • Invoice Date • Invoice Number

Area of Interest	Attribute
	<ul style="list-style-type: none"> • Invoice Amount • Additional Information
Lot and Serial Numbers	<ul style="list-style-type: none"> • Revision Number • Lot • From Serial Number • To Serial Number • Additional Information
Other	<ul style="list-style-type: none"> • Transaction Date • Task Type • Task Type Description • Status • Quantity • UOM Name • Additional Information

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Jeopardy Score](#)
- [Jeopardy Priority](#)
- [Jeopardy Threshold](#)
- [Set Up Jeopardy and Lead Time to Manage Delay](#)

Stop and Resume

Hold Your Sales Orders

Order Management uses a sales order hold to temporarily stop an orchestration process from processing an order line. You can use a hold to manage order fulfillment.

You might need to place a hold for a variety of reasons:

- You submitted a sales order and Order Management scheduled it for delivery. Later that day, the customer who placed the sales order realizes they can't receive it because they will be out of the country for three weeks. The customer calls and requests to delay delivery.
- Personnel at the warehouse ask you to temporarily hold the shipment because a fire happened in the warehouse.
- Your order administrator informs you that a problem might exist with an item, and requests that you temporarily hold all your sales orders that include the item while your sales engineers investigate the problem.

Note

- You can apply a hold at any step of an orchestration process. For example, if you apply a hold on the invoicing step immediately after you submit the sales order, then the orchestration process will do all of its steps right up to the invoicing step, and then stop on the invoicing step.
- You can apply more than one hold on a sales order. For example, you can apply a hold on shipping task and another one on the invoicing task. The orchestration process will stop on the shipping task, wait there until someone releases the hold on the shipping task, proceed to the invoicing task, and wait there until someone releases the hold on the invoicing task. This approach is useful when you have more than one dependency that you must resolve before finishing the sales order.
- You can add a comment when you apply a hold. Use it tracking or auditing purposes. For example, you might enter details about why you applied the hold and the dependencies you must resolve before you can release the hold.
- Order Management might automatically apply a credit check hold. You can't manually apply a credit check hold. If you have sufficient privileges, you can release a credit check hold. For details, see [Manage Credit Check](#).
- A hold stops the orchestration process from doing the next task in the process.

How Holds Work

Automatically Apply Hold

- Order Management automatically applies a hold if a change in the Order Management work area requires Order Management to compensate the orchestration process. Order Management sends a message to the fulfillment system to apply a hold so fulfillment stops while Order Management compensates the orchestration process.
- Order Management automatically releases the hold after it finishes compensation.
- An orchestration process can automatically apply a hold only when a hold request already exists in Order Management, in the source system, or in the fulfillment system.

For example, assume an orchestration process is at the scheduling step when a source system sends a request to hold the shipping task. Order Management stores the request until the orchestration process reaches the shipping step. It then searches for existing requests, and then applies them.

Propagate Hold

- Order Management transforms a hold that it receives from a source system or a fulfillment system. The hold becomes part of the sales order.
- If a source order includes a hold, then Order Management includes it on the order lines that it maps to the sales order.
- If an order line includes a hold, and if Order Management splits the order line, then it includes the hold on each new order line that it creates to do the split.
- If Order Management applies or releases a hold to one or more lines in a shipment set, then it applies the hold on the entire shipment set.

Assume a shipment set includes lines 1, 2, and 3. If you apply a hold on line 1, then Order Management applies the same hold on lines 2 and 3.

Display and Process Active Hold

- An active hold is a current hold on an orchestration process.
- The Hold Source System attribute displays the location of where the hold was applied.

- If an order line includes a hold, and if the orchestration process that the order line references hasn't reached the step that includes the hold, then Order Management might continue to run the process until it reaches the step that includes the hold.
- If an order line includes a hold that Order Management hasn't released, then Order Management displays it as an active hold even if the line doesn't include an active hold.

Release Hold

- You or an orchestration process can release a hold that you apply in the Order Management work area only in the Order Management work area.
- Only the user of a source system can release a hold that another user of the source system applies.
- If you cancel an orchestration process, then Order Management releases any holds that reference the process. If you don't cancel an orchestration process, then you must manually release each hold and provide a release reason.

Configured Items

You can apply a hold on an item that isn't configured, a configured item, a pick-to-order item, a kit, or an item that includes a combination of these characteristics.

Assume the AS54888 is a configured item and you add it to order line 1. You configure the AS54888 so it includes the 1 TB hard drive configurable option and another option, the Dance Revolution software suite, which is also an item that you sell by itself:

- If you apply a hold on order line 1, then Order Management also applies the hold on the hard drive and the software suite for order line 1.
- You can apply a hold only on the entire order line for the configured item, the AS54888.
- You can't apply a hold on the hard drive or the Dance Revolution software suite on order line 1, but if add only the Dance Revolution item to order line 2, then you can place a hold on line 2.

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Fix Problems and Improve Performance](#)
- [Monitor Order Fulfillment](#)
- [Use Holds to Temporarily Stop Processing](#)
- [Manage Credit Check](#)

Use Holds to Temporarily Stop Processing

Apply a hold on a sales order or order line to temporarily stop Order Management from processing the order or the line. You can also manually release a hold.

Hold an Order Line

Assume you submit a sales order and Order Management schedules it for delivery. Later that day, the customer who placed the sales order realizes they must verify their order to make sure it works for them, but must do some investigation first. The customer calls and requests to delay delivery for one week.

Place a hold on an order line:

1. Go to the Order Management work area, then search for and open your sales order.
2. Note the value in the Line Status attribute on the line that has the item you need to hold. The status identifies where the order line is in order fulfillment. Use it to determine whether placing a hold will achieve the result you need.

In this example, assume the status is Awaiting Shipping, which indicates Order Management scheduled the order line for shipping but hasn't shipped it to your customer. If the status were Shipped, then it would be too late to place a hold and you would have to request the customer to return the item.

3. Select the line, then apply a hold:

Attribute	Value
Hold Name	SHIP_ALL

Hold Name indicates where to place the hold. For example, HOLD CREATE INVOICE places a hold on an invoice task, such as Create Billing Lines.

You determined that Order Management hasn't shipped the sales order, so you can use SHIP_ALL to temporarily stop processing for all shipping that Order Management does for the order line.

4. Click **Customize Holds** to display the Holds attribute.
5. Use the order line to verify Order Management placed a hold on the order line. Make sure it displays the On Hold icon.

Release the Hold

Assume your customer calls, is now ready to receive the sales order, and you must release the hold.

1. Click **Release Hold**.
2. Set values, then save:

Attribute	Value
Hold Name	SHIP_ALL
Release Reason	Select the most appropriate value.

Note

- You might need to release more than one hold. To view all holds that are currently applied on the sales order and order lines, open the order, click **Additional Order Details > Holds**.
- If there's no hold on the order line, or if you don't have the privilege that you need to release the hold, then the Release button is grey and you can't click it.

If you can't release the hold, contact your order manager. You might not have the privileges that you need to release the hold.

Hold a Sales Order

Hold the entire sales order instead of just one order line:

1. On the Order page, click **More Actions > Apply Hold** on the order header.
2. Select a value for Hold Name to specify where in the orchestration process you want to apply the hold.

Each orchestration process includes tasks that it runs sequentially, such as Schedule, Reserve, Ship, and then Invoice. You can specify where in the orchestration process to place the hold. For example:

Name	Description
SCHLD_ALL	Place a hold on all steps in the orchestration process that schedule your item.
RESRV_ALL	Place a hold on all steps that reserve your item in inventory.
SHIP_ALL	Place a hold on all steps that ship the item to your customer.
INVOICE_ALL	Place a hold on all steps that invoice the item.

You can also set these values when you place a hold on an order line or order line. The values you can select depend on how your order administrator sets up Order Management.

Order Management places a hold on all order lines in the sales order regardless of the value you select. When it comes time to release the hold, make sure you release the hold on the order header, not the order lines. If you release the lines but not the order, the hold will remain in place on the order and processing won't resume.

Hold a Draft Order

Use the Order Management work area to place a sales order that's in Draft status on hold:

- You can apply or release a hold only when you create or edit the order.
- You can't apply or release when you revise the order.

Hold a Fulfillment Line

You can place a hold on a fulfillment line instead of an order line. For example, assume Order Management splits an order line into more than one order line, and you must place a hold only on one of these split fulfillment lines but not the entire order line:

1. Go to **Home > Order Management > Order Management (New) > Sales Order Lines**.
2. Search for and select your order line, then click **More Actions > Apply Hold**.

Hold Tasks That Are In Progress

We recommend that you add a check mark to the Hold Tasks In Progress option. Order Management will immediately stop processing the sales order on the task that you specify and will send a hold request to the fulfillment system that's currently processing the task even if the task already started. If you don't enable this option, then Order Management

will still add the hold but not communicate the hold request to the fulfillment system. You can set this option only in a fulfillment view. Order Management automatically enables it in other views.

If you enable the Hold Tasks In Progress option, and if the sales order:

Status	What Order Management Does
Hasn't reached the task you're holding.	<p>Continues processing until it does reach the task, then applies the hold.</p> <p>For example, the predefined ShipOrderGenericProcess orchestration process includes tasks that it runs sequentially, one after the other:</p> <ol style="list-style-type: none"> 1. Create Scheduling 2. Create Inventory Reservation 3. Create Shipping 4. Wait for Shipment 5. Create Billing Lines 6. Wait for Billing <p>Assume you place a hold on the Create Shipping task and the orchestration process is currently running the Create Scheduling task. It will finish Create Scheduling and Create Inventory Reservation, then stop immediately before Create Shipping. It will remain stopped until you release the hold. Once you release the hold, the orchestration process will resume the flow, beginning with Create Shipping.</p>
Already finished the task you're holding.	<p>Applies the hold but doesn't stop processing because the task already finished. The sales order proceeds through order fulfillment as if the hold doesn't exist.</p> <p>Using ShipOrderGenericProcess as an example, assume you place a hold on the Create Shipping task and the orchestration process is currently running the Wait for Shipment task. It will finish Wait for Shipment, then run Create Billing Lines and Wait for Billing.</p>

If the task is a long-running task, then Order Management applies the hold and communicates it to the fulfillment system just like it does a task that isn't long-running.

Release Order Header and Order Line Holds

You can't use a fulfillment view to release a hold from an order line or a sales order. Instead, go to the classic Order page, then do one of:

- On the order header, click **Additional Order Details > Holds**, then release the hold.
- On the order line, click **More Actions > Release Hold**.

Get Details About Holds on Orchestration Processes

Get details about all the current holds that exist on an orchestration process. For example, to investigate why a sales order hasn't shipped. You can identify the fulfillment tasks that are on hold:

1. Go to the Order Management work area, then click **View All Actions > Manage Orchestration Processes**.
2. On the Manage Orchestration Processes page, search for your sales order.
3. In the search results, click the **order line** you must hold.
4. On the Orchestration Process page, click **View Hold Details**.
5. In the Hold Details dialog, examine the fulfillment tasks that are on hold, including who applied them, why they were applied, and when Order Management applied them.
6. If necessary, contact the person who applied the holds to determine how to fulfill the sales order.

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Fix Problems and Improve Performance](#)
- [Monitor Order Fulfillment](#)
- [Hold Your Sales Orders](#)

Resume Paused Sales Orders

Release a pause task so the orchestration process can resume processing your sales order.

A pause task temporarily pauses processing to wait until a date or event happens before proceeding to the next orchestration process step. A pause isn't a hold. For details, see [Hold Your Sales Orders](#).

Your order administrator sets up the pause task. For details about how pause tasks work for you, and the role you must use to release a pause task, ask your order administrator.

Resume a paused sales order:

1. Sign into Order Management with the Order Orchestration Error Recovery Manager role.
You must use this role to use this procedure.
2. Go to the Order Management work area, then click **View All Actions > Manage Orchestration Processes**.
3. On the Manage Orchestration Processes page, search for the sales order you must resume.
4. In the search results, in the row that displays your sales order, in the Orchestration Process Number column, click the **link**.
5. On the Orchestration Process page, click **Release Pause Task**.

Unlocking Sales Orders

Order Management locks the sales order while the pause task waits for the date or event. For example:

- Assume your order administrator creates a pause task so Order Management waits to receive a reply from the warehouse that it successfully reserved inventory for the item you ordered.
- While waiting for the reply, assume you create an order revision, you change the Requested Ship Date, submit the revision, but then Order Management displays a message indicating the order is locked.
- You can use Release Pause Task to unlock the sales order.

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Fix Problems and Improve Performance](#)
- [Monitor Order Fulfillment](#)
- [Hold Your Sales Orders](#)
- [Use Holds to Temporarily Stop Processing](#)

Credit Check

Manage Credit Check

Examine credit check details, including status updates.

Credit check is a calculation that determines whether the credit that's currently available for the customer account is equal to or greater than the transaction amount.

If your sales order requires credit check, then Oracle Receivables creates a case folder. A case folder is a page in Oracle Receivables that includes details about the customer, such as credit limit, credit rating, and so on, and the sales order. A credit analyst uses the case folder to determine the action to take, such as remove the credit hold, increase credit limit, and so on:

Order 521346

Business Unit: Vision Operations
Customer: Hilman and Associates
Bill-to Account Number: 1004
Ship-to Address: JAPAN,77JT34,Nagano,

Additional order details

All 1 selected | Copy Line | Update Lines | Expected Availability | More

Line	Item	Credit Reference	Quantity	UOM
1	Bouquet	1003	1	Dozen

Credit Reference = case folder number

Source transaction = order number

Credit Case Folder 1003 Source Transaction 521346

Currency: USD

Customer: Hilman and Associates
Customer Account: CDRM_72119
Description: Review due to insufficient credit.
Credit Classification

Note

- Each case folder includes a unique number.
- The Credit Reference attribute on the order line in Order Management references the case folder in Oracle Receivables.
- The Source Transaction attribute in the case folder references the Sales Order Number attribute in Order Management. Oracle Receivables uses Source Transaction because an account might reference a transaction that's not a sales order in some other application.

Assume you create the sales order, it goes into credit check hold, a credit analyst releases the hold, and you must examine credit check details:

1. Examine hold details:
 - Search for your sales order in the Order Management work area, then examine the details:

Order 521346

Business Unit: Vision Operations
Customer: Hilman and Associates
Bill-to Account Number: 1004
Ship-to Address: JAPAN,77JT34,Nagano,Ngoyen 370

Additional order details

⚠ This order or one of its lines has 1 hold

All 1 selected Copy Line Update Lines Expected Availability More Actions ▾

Line	Item	Item Description	Quantity	UOM
<input checked="" type="checkbox"/>	1	Bouquet Decorative Bunch 12 Yellow Fresh Live Roses	1	Dozen

Order Details **Attachments** **Holds (1)**

Releasable Holds

All 1 selected Release

HOLD CREATE SHIP
On line 1
Hold Code for Create Shipping Service

Applied
Applied By: SCMOPERATIONS Applied On: 1/3/25 12:39 PM

2. Examine the credit reference:

- Click **Customize Columns** on the order line, then display the Credit Reference attribute.
The Credit Reference attribute displays the case number.

3. Get details about credit check:

- o Click **View All Actions > Manage Order Orchestration Messages**.
- o Enter the value, then click **Search**:

Attribute	Value
Orchestration Order	521346

- o In the search results, click the **row** that contains this value:

Attribute	Value
Order Orchestration Function	Credit Verification

- o In the Fulfillment Task Messages area, examine the message.

For example:

Credit analyst Aaron Holmes approved the credit request for order line in sales order 521346. The credit analyst approved the amount 32,950.00, and then closed case folder 1003 on date 10-9-2026.

You can't modify some sales order attributes when the sales order is on credit check hold because they affect credit check. For example, you can't modify Bill-to Customer, Ordered Quantity, UOM, and so on.

Credit Review Pending

The Credit Review Pending status means one or more order lines failed credit check when you submitted the sales order.

If you must change the sales order, use the Revert to Draft action, make your changes, then resubmit the sales order.

For example, you can reduce quantity. Reducing quantity reduces the extended amount and increases the likelihood that the order line will pass credit check.

Assume maximum credit for the customer is \$10,000, the customer orders a quantity of 11 for an item that costs \$1,000 each, which results in an extended amount of \$11,000 that exceeds the credit limit. You can reduce quantity to 9 to bring the extended amount down to \$9,000, which is below the credit limit.

Revise Sales Orders That Are Under Credit Check Review

Here's some of the revisions you can do:

- Cancel the entire sales order.
- Cancel the order line that's under credit check hold.
- Revise attributes that don't affect credit check.

You can't revise these attributes because they affect credit check:

- Bill-to Customer

- Ordered Quantity
- Ordered UOM
- Transaction Currency Code
- Extended Amount

Related Topics

- [Monitor Order Fulfillment](#)
- [Reauthorize Payment](#)

Release Holds for Order Lines That Fail Credit Check

If an order line fails credit check, then Order Management places the order line on hold. You can release the hold so the sales order can continue processing.

You can also periodically use Release Holds to determine whether the credit that's currently available covers the purchase price of the order lines.

Release holds for order lines that fail credit check:

1. Go to **Home > Order Management > Order Management (New) > View All Actions > Manage Orders in Error**, then search for the sales order that has the hold that you need to release.
2. In the search results, click the **link** in the Order column.

- On the order page, click **Error** to get details about the credit check:

The screenshot shows the 'Order: Maple Tree Corp. - 507252 - Processing' page. The 'Order Lines' table has one row highlighted in yellow: 'AS54888 - Standard Desktop' with a status of 'Not Started', a quantity of 50, and an amount of 32,950.00. A red 'X' icon is next to the item name. A callout bubble points to this icon with the text 'Click Error. ...'. Below the table, a 'Warning' dialog box is open, titled 'Credit verification: Messages'. It contains a message: 'The credit check for customer Maple Tree Corp. failed for the following reason: A new credit case folder was created.. The order lines that failed are now on hold.' A callout bubble points to this message with the text '...to read details about credit check.' The dialog box also has a 'Done' button at the bottom right.

- Release the hold.

Order Management releases the hold and resumes processing the sales order. It also runs credit check again. If credit check fails, then Order Management places the order on hold again.

Related Topics

- [Monitor Order Fulfillment](#)
- [Reauthorize Payment](#)

Manage Customer Credit

Manage customer credit that affects credit check for your sales order.

Assume you're a credit analyst. You receive a request from an Order Entry Specialist to approve credit check for sales order 505200. You examine the sales order in your case folder, perform a credit analysis, and determine you can approve credit.

For details about case folders and managing credit, see *Using Receivables Credit to Cash*.

Manage customer credit:

1. Make sure you have the privileges that you need to manage Oracle Receivables.
2. Go to the Credit Reviews work area.
3. On the Credit Reviews page, examine the list of case folders in your queue.

Credit Reviews adds a case folder for each sales order that goes into credit check. It adds a unique case folder number that you can use to manage the case.

4. Click **Show Filters**.
5. Set Source Transaction Number to 505200, then click **Search**.

Notice that the Credit Reviews list displays the case folder for sales order 505200.

6. In the Credit Reviews list, click the **link** in the Number attribute.
7. On the Credit Case Folders page, notice the details that display for sales order 505200, then click **Recommendations**.
8. Set Type to an appropriate value according to your case folder analysis, such as:
 - o Remove Customer from Credit Hold
 - o Approve Source Transaction Credit Request
 - o Set Credit Limit
 - o Set Order Amount Limit

For this example, choose Approve Source Transaction Credit Request.

9. Click **Actions > Approve**.

Here's what Order Management does:

- o Automatically releases the credit check hold.
- o Changes the sales order status from Credit Review Pending to Processing,
- o Changes the order line status to Change Pending.

Related Topics

- [Monitor Order Fulfillment](#)
- [Reauthorize Payment](#)

Fulfillment Lines

Schedule Order Lines Manually

Oracle Order Management usually schedules an order line when it assigns an orchestration process to the line. However, if the order line is currently processing a manual scheduling step, then you can manually schedule the line.

1. Go to the Order Management work area, then search for and select the lines that you need to schedule.
2. Use one of these actions:
 - o **Check Availability.** Select a scheduling option. If you select Override Schedule, then order promising doesn't calculate options.
 - o **Schedule.**

You can also modify an attribute that will reschedule the line, such as Requested Ship Date or Requested Arrival Date.

Note

If You	Then
Unschedule an order line.	Order Management releases supply so it becomes available for some other, higher priority order line. If you unschedule an order line, then Order Management sets the status of the line to Awaiting Scheduling.
Schedule a configured item or shipment set.	If you select an option for one or more order lines, and if these lines are part of a configured item or shipment set, then Order Management applies the scheduling option that you select to all of the order lines that are part of the configured item or shipment set.
Attempt to schedule or unschedule an order line that's on hold.	You might encounter an error that prevents you from doing an action on an order line: <ul style="list-style-type: none"> • Schedule • Unschedule • Reserve • Unreserve Its possible a hold on the order line is preventing you from doing the action. See if there's a hold on the line. If there is, release it, then do the action. For details, see <i>Hold Your Sales Orders</i> .

Override the Schedule

If you set Override Schedule to Yes, then Order Management schedules shipment depending on how you edit the order line:

What You Set	What Order Management Sets
Scheduled Ship Date	Scheduled arrival date and shipping method.
Scheduled Arrival Date	Scheduled ship date and shipping method.
Scheduled Arrival Date and Shipping Method	Scheduled ship date.
Scheduled Ship Date and Scheduled Arrival Date	Nothing.

Note

- Scheduled Ship Date or Scheduled Arrival Date is required.
- If you don't manually set a value for an attribute, then Order Management gets the value from the order line.
- Shipping Method is optional. If you don't set it, and if its not available on the order line, then Global Order Promising sends it and the scheduled dates.
- Order Management updates the shipping method only if the order administrator sets up Global Order Promising to promise sales orders. If it's not set up, then the shipping method might not contain a value. Contact your order administrator for details. For background, see [Overview of Global Order Promising](#).

If you select:

This Option as the Source	Then You Must Set This Attribute
Warehouse	Warehouse
Supplier	Supplier and Supplier Site

Schedule Order Lines During a Drop Shipment

An application that's downstream of Order Management might cancel the purchase order or purchase request for a for a variety of reasons, such as supply isn't available to fulfill the item in time to meet the requested fulfillment date. Oracle Procurement is an example of a downstream application.

If a downstream application cancels the purchase order or purchase request, then Order Management updates your sales order differently depending on whether your order administrator has set up Order Management to use Global Order Promising.

Order Management Uses Global Order Promising

If the downstream application cancels the purchase order and it:

Doesn't Cancel the Purchase Requisition	Cancels the Purchase Requisition
Order Management sets the order line status to Requisition Created.	Order Management sets the order line status to Manual Scheduling Required. You can do one of the actions described earlier in this topic to manually schedule the line.

Doesn't Cancel the Purchase Requisition	Cancels the Purchase Requisition

Order Management Doesn't Use Global Order Promising

If the downstream application cancels the purchase order and it:

Doesn't Cancel the Purchase Requisition	Cancels the Purchase Requisition
Order Management sets the order line status to Requisition Created.	<p>Order Management sets the order line status to Change Pending, and displays a message. For example:</p> <p>The procurement application canceled the requisition line or purchase order schedule for sales order 528693, order line 1-1. (DOO-2685997)</p> <p>To fix this problem, try one of these solutions:</p> <ul style="list-style-type: none"> • Revise the sales order to cancel this order line. • Assign a different supplier or warehouse. • If the supplier can fulfill demand now, then use the Orchestration Process page to recover the task.

Review Promising When You Prioritize and Reschedule Order Lines

Try It

1. Go to **Home > Order Management > Order Management (New) > Sales Order Lines** .
2. Select some order lines, then click **More Actions > Check Availability** .
3. On the Check Availability page, click **More Actions > Manage Scheduling Priority > Create** .
4. In the dialog that displays, enter a name, such as My Scheduling Priorities, then specify how you want to sort. For example:

```
Prioritize by Requested Date in descending order
Then by
Requested Quantity in ascending order
Then by
Order Creation Date and Time in ascending order
```
5. Click **Create** .
6. On the Check Availability page, click **Scheduling Priority Application Default > My Scheduling Priorities** , then examine the results.

You can select different priorities. Assume you create another priority named GOP-RULES. You can select it, then see how it affects scheduling.

You can use these attributes to specify priority:

- Requested Date
- Scheduled Ship Date
- Scheduled Arrival Date
- Order Creation Date and Time
- Order Margin
- Order Revenue

- Requested Quantity
- Scheduled Quantity
- Item Price
- Fulfillment Cost
- Order Date

Note

- You can add up to three rules in one priority scheduling rule.
- If you don't specify a scheduling priority or select one, then promising will use the Requested Date attribute to sort order lines from one or more sales orders.
- You can manually update the Priority attribute on the Check Availability page at any time. Refresh the page to see the results of your edit.

For more, see:

- [Redwood: Review Promising When You Prioritize and Reschedule Order Lines](#)
- [Redwood: Check Availability and Reschedule Order Lines](#)

Review Supply Allocation

Use a Redwood page to review the total and remaining supply that's allocated each week for the items that you select. You can also view the expected fill rate and on-time percentage.

The supply that's available for an allocated item might not meet demand and that might affect the requested quantity and timing. You can now access a report that illustrates the total amount that's assigned to each node in the allocation hierarchy, the remaining quantity that customers can order each week, and other related measures. The report also summarizes the amount of demand that's scheduled on time and the fill rate. Use these details to explain delay or adjust quantity so you can avoid allocation limits.

Try It:

1. Go to the Order Management work area and open a sales order that's in Processing status.
2. Select an order line, then click **More Actions > Check Availability** .

Here's another way:

Go to **Home > Order Management > Show More > Supply Allocation** .

The report displays supply allocation data for an item-organization. It includes data for a variety of measures:

Measure	Description
Allocated Supply	Supply allocated to the allocation node during the week according to an allocation rule.
Available Supply	Allocation that's available on a node. It's the allocated supply minus the consumed supply.
Consumed Supply	Allocated supply that other order lines have already consumed.
Cumulative Available Supply	Allocation that's still available for each week on a cumulative basis.
Total Weekly Supply	Total supply for the item and organization for each week without referring to an allocation node.

Measure	Description
Manual Allocation	Quantity of supply that's allocated to an allocation node.
Allocation from Redeployment	Supply that promising redeployed from other allocation nodes.
Supply Allocated for Redeployment	Allocated supply for the node minus the supply that's protected according to the value in the Stealing Protection Percentage attribute on the allocation rule.
Supply Allocated to Child Nodes	Allocation to child nodes.
Gross Allocated Supply	Supply that promising allocated to the parent node and its children.
Gross Allocation from Redeployment	Total quantity of supply that promising redeployed for an allocation node and its children. The report displays: <ul style="list-style-type: none"> • A negative value for supply that it redeployed to other nodes. • A positive value for supply that it redeployed from other nodes.
Gross Available Supply	Allocation that's available for the parent node and its children.
Gross Consumed Supply	Allocation consumed at the parent node and its children.
Gross Cumulative Supply	Cumulative allocation that's available at the parent node and its children.
Total Supply	Total supply that's available. Use it to get the history about shipped sales order.
Consumed Supply by Shipped Orders	Allocated supply that shipped orders consumed at a node. Use it to get the history about shipped sales order.
Gross Consumed Supply by Shipped Orders	Allocation that promising consumed at the parent node and its child nodes for orders already shipped. Use it to get the history about shipped sales order.

The report displays data for demand satisfaction measures:

Measure	Description
Demand Quantity	Total quantity for the demand at an allocation node for each week.
Scheduled On Time Percentage	A percent that measures the number of sales orders out of the total number of orders for one week. Displayed as the percent of sales orders where: <ul style="list-style-type: none"> • The scheduled ship date is less than or equal to the requested ship date. <p>Or</p> <ul style="list-style-type: none"> • The scheduled arrival date is less than or equal to the requested arrival date. It's the number of sales orders that are scheduled and on time divided by the total number of sales orders.
Scheduled Fill Rate Percentage	A percent that measures the demand out of the total demand for one week. Displayed as a percent of sales orders where:

Measure	Description
	<ul style="list-style-type: none"> The scheduled ship date is less than or equal to the requested ship date. The scheduled arrival date is less than or equal to the requested arrival date. It's the item's quantity that's scheduled and on time divided by the total quantity.
Demand Revenue	Amount of revenue from the demand for the requested dates during the week.
Scheduled On Time Revenue	Amount of revenue from the demand for the requested dates during the week where: <ul style="list-style-type: none"> The scheduled ship date is equal to the requested ship date. or <ul style="list-style-type: none"> The scheduled arrival date is equal to the requested arrival date.

Note

- You can use this report only for items where you have set their ATP mode to Supply Chain Search, and where you have enabled the Respect Allocation Constraints attribute in your ATP rule. See [Set Attributes on Your Supply Chain](#).
- You can't use this report for items where you set the ATP mode to Infinite Availability or to Lead-Time Based.
- The allocation set ups in the allocation rule rely on the Attribute-Based Planning feature.
- This report displays allocation details for each week according to allocations made from Monday through Sunday. You can specify only Monday as the start date.

For more, see [Allocate Supply in a Hierarchy](#).

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Hold Your Sales Orders](#)

What's a Split Order Line

Split one order line into more than one order line to improve order fulfillment performance.

Splitting an order line is a supply chain technique that you can use to fulfill your sales order in a timely and efficient way. Assume your order line includes a quantity of 50 for the TABLET item, but the preferred Denver warehouse only has a quantity of 30 in stock. The Seattle warehouse has 40. To avoid a delay, you can split the line so it gets the quantity it needs from Denver and Seattle:

Order 522218

Processing

Business Unit **Vision Operations** Customer **Computer Service and Rentals** Order Total **18 000.00 USD**

Business Unit: Vision Operations Customer: Computer Service and Rentals

Ship-to Address: 1800 Satellite Drive, Distribution Center, CHATTANOOGA, TN 37401

[Additional order details](#)

Try line number, item details, line status, or warehouse

All 1 selected Copy Line Update Lines Expected Availability More Actions ▾

Delete Line

Add or Modify Shipment Set

Remove Shipment Set

Return Items

Check Availability

Schedule

Unschedule

Split Line

Substitute

Apply Manual Price Adjustment

Split one line into two

☐	Line	Item	Credit Reference	Credit Expirati...	Credit Approv...	Quantity	UOM	Requested Date	Amount
<input checked="" type="checkbox"/>	1	Bouquet			No	100	Each	11/20/25 6:41 PM	15 000.

20 from Denver

There are different types of splits:

Type of Split	Description
Manual	<p>Note</p> <ul style="list-style-type: none"> You can use Split Line only for a sales order that's on a manual schedule task.

Type of Split	Description
	<ul style="list-style-type: none"> To split an order line that isn't on a manual schedule task, click Unschedule while the orchestration process is running, then split the order line. <p>Unschedule moves the orchestration process back to the schedule task, which is now a manual task. Learn how to unschedule. For details, see <i>Fix Problems and Improve Performance</i>.</p> <ul style="list-style-type: none"> Order Management doesn't do change management during a manual split. You can't use the Check Availability page to manually split an order line, but the availability option you select might implicitly split the order line.
Automatic	<p>Note</p> <ul style="list-style-type: none"> If you select a fulfillment option on the Check Availability page, then this option might require Order Management to split an order line so it can provide the availability results you need. Some other fulfillment system might automatically split an order line.

Sometimes Order Management doesn't allow a split:

- The Splits Allowed attribute on the order line doesn't allow the split.
- The order line doesn't allow a split. If you use an override privilege, then you can override this restriction.
- The quantity of the order line is one or less.
- The order line is in a shipment set. To split this line, remove it from the shipment set, then split it.

How Order Management Determines Availability

A substitution is the act of replacing one item with some other item. For example, replacing an 80GB hard drive with a 100GB hard drive because there aren't any 80GB hard drives in inventory.

Here are the substitutions that Order Management considers to determine availability when it splits an order line:

Where Split Happens	Description
Split an order line across more than one warehouse.	<p>If the Requested Ship-from Warehouse attribute on the order line is:</p> <ul style="list-style-type: none"> Empty. Order Management considers more than one warehouse when it splits the order line. Not empty. Order Management considers only the warehouse that the Requested Ship-from Warehouse references. It doesn't split the order line. <p>Each order line that the split creates might specify a different value for the Expected Ship-from Warehouse attribute.</p> <p>Order Management uses business rules that your order administrator sets up to determine the warehouses it uses to supply the item.</p>
Split an order line across substitute items.	<p>Order Management substitutes an item only if the Allow Substitutions attribute on the order line equals Yes. Each order line that the split creates might specify a different value for the Available Item attribute.</p> <p>Assume you create an order line that requests 100 units of an item. Supply for the item is 80 units and supply for the substitute item is 50 units. Check Availability will split the order line into these order lines:</p> <ul style="list-style-type: none"> One order line that references 80 units of the item

Where Split Happens	Description
	<ul style="list-style-type: none"> Another order line that references 20 units of the substitute item
Split an order line across dates.	<p>If an order line requests inventory that isn't sufficient on a given date, then Order Management splits the line across dates:</p> <ul style="list-style-type: none"> Create one order line for the quantity that's available on the requested date. Create another order line for the remaining quantity that it will deliver on a later date. <p>Assume you create an order line on November 15, 2019 that requests 100 units of an item, and that supply is available for the item on these dates:</p> <ul style="list-style-type: none"> 70 units are available on November 15, 2019. 40 units are available on November 30, 2019. <p>Check Availability will split the order line into these order lines:</p> <ul style="list-style-type: none"> One order line with on-time delivery of 70 units, with an expected delivery date of November 15, 2019. Another order line with delayed delivery for 30 units, with an expected delivery date of November 30, 2019.

How Split Order Lines Affect Status

Order Management creates two or more instances of the same fulfillment task when it splits an order line. These tasks might include different statuses during processing.

Consider some examples:

- The status of the Schedule task for order line A1 is Not Scheduled, and the status of the Schedule task for order line A2 is Scheduled.

Order Management examines the split priority of the task statuses, then sets the orchestration process status to the task status that includes the highest split priority.

- Order Management splits an order line that results in two instances of the Schedule task. One of these tasks includes a Complete status, and the other task includes a Pending status. The value of the split priority for Pending is two, and the value of the split priority for Complete is three.

Order Management sets the orchestration process status to Pending.

Related Topics

- [Split Order Lines](#)
- [Fix Problems and Improve Performance](#)
- [How Order Management Fulfills Order Lines](#)
- [Ship Order Lines in Shipment Sets](#)

Split Order Lines

Split an order line in the Order Management work area.

In this example, assume you know the Denver warehouse is getting low on inventory, so you split an order line to get 30 units from the Seattle warehouse and 20 units from the Denver warehouse.

Learn about other reasons why you might need to split an order line. For details, see *Fix Problems and Improve Performance*:

1. Create a sales order that includes an order line with 50 units for the AS54888 item, then submit it.
2. Split the line and set these values:

Attribute	Description
New Quantity	30
Warehouse	Seattle

Note

- o Assume your order administrator set up Order Management so it automatically gets all units from Denver.
- o Order Management automatically maintains Ordered Quantity across all rows you add. For example, if the order assigned 50 units to Denver, you add a new row and assign 30 units to Seattle, then Order Management automatically sets Denver to 20 units.
- o The values you can set depend on how your order administrator sets up split behavior.

Order Management splits the entire orchestration process that the order line references any time it splits an order line.

Split Lines When You View or Search Orders

Use a Redwood page to split an order line when you view or search a sales order that's in Processing status. Specify the split quantity and update attributes when you do the split, such as warehouse, supplier, supplier site, ship method, and demand class. Do the split without having to unschedule the order line.

Splitting a line that you already submitted but haven't shipped allows you to fulfill the sales order in a timely and efficient way.

Split on the Sales Order Lines Page

Assume a fulfillment line includes a quantity of 10 but the preferred warehouse, Seattle Warehouse, only has 3 in stock. To avoid a delay, you can split the line to get the remaining quantity from other warehouses.

It's easy to do:

1. Select a line that isn't in draft status and that isn't fulfilled on the Sales Order Lines page, then click **More Actions > Split Line**.
2. Use the Split Line dialog to specify how you want to split the line across warehouses. The split starts a scheduled process that runs in the background. Notice the value of the process ID in the message, such as 726654.
3. Click the **Action Status** tab, then monitor the status for the 726654 scheduled process.

Split on the Order Page

Open a sales order, select the line that you need to split, then click **More Actions > Split Line**.

Note:

- You can split lines only for a standard item. If that item has a coverage or subscription, then Order Management will also split them. You can't split a configured item or kit.
- This feature ignores the Splits Allowed attribute on the fulfillment line.
- If the line that you select is in a shipment set, then this feature won't split that line. You must first remove the line from the set, then split it.
- The action request includes details and error messages only for the original line, not the split line.

For more, see *Redwood: Split Lines When You View or Search Orders*.

Related Topics

- [What's a Split Order Line](#)
- [Source Items from Different Warehouses](#)
- [Fix Problems and Improve Performance](#)
- [How Order Management Fulfills Order Lines](#)

Source Items from Different Warehouses

Source items that aren't available in one warehouse from a different warehouse. Use this technique to improve on-time delivery for your sales order.

Change Fulfillment Lines

Consider a scenario:

- You are an order manager at a company that supplies carpeting from various warehouses throughout the United States.
- You just found out that the New York warehouse is flooded due to a recent storm, but you know the Boston warehouse includes sufficient supply.
- You search all order lines that source carpet from the New York warehouse.
- You select all order lines, open Edit Fulfillment Lines, then change the warehouse to Boston.

Modify the Warehouse

Order Management automatically sources each item according to the sourcing rules and warehouse ranking that it references. It also provides more than one option you can use to schedule a sales order, including sourcing each item from a different warehouse. You can explicitly change the warehouse to try to improve order fulfillment's performance:

1. Identify a warehouse that contains the item and quantity that the order line requires. Do one or more of these:
 - Use the reports and analytics in the Order Management work area.
 - Examine the Availability pages.
 - Use Supply Availability reports.
 - Use the Supply Allocations reports.

- o Take action outside of Order Management.
- 2. Search for your sales order, then create a revision.
- 3. Set a value in the order line's Warehouse attribute, then submit.

Split the Fulfillment Line

If the warehouse contains only some of the quantity that the order line requires, then you can split the fulfillment line, and then select another warehouse to source the remaining quantity.

For example, assume order line 1 requires 50 tablets. The order line is in jeopardy because the current warehouse, the Denver warehouse, only has a quantity of 30. So, you split the order line, then specify the second order line to source 30 from Seattle. For details, see [What's a Split Order Line](#).

Related Topics

- [Split Order Lines](#)
- [How Order Management Fulfills Order Lines](#)

Fulfill Configured Items

Order Management fulfills a sales order that includes a configured item differently than how it fulfills a sales order that doesn't.

Here's what Order Management does during different stages of order fulfillment when a sales order includes a configured item:

Order Fulfillment Stage	Description
Schedule	Schedules a configured item like any other order line, except Order Management can only schedule a configured item that's complete. A configured item that's missing a configurable option isn't complete. Assigns all the order lines that a configured item or shipment set references to the same orchestration process.
Split	Allows a split order line for the configured item, but not for child order lines. If Order Management does a split, then it cascades the split to the child order lines.
Hold	Applies a hold on the configured item and on the child order lines.
Ship	Sends the shippable order lines that a configured item contains to the shipping system together as a single shipment set. If a configured item includes a partial shipment of order lines, then here's what might result: <ul style="list-style-type: none"> • Proportional split. Results in a shipped configured item and an unshipped configured item. • Nonproportional split. Results in a partially shipped configured item that includes a separate structure.
Bill	Sends all the order lines that the configured item contains to the billing system together as a single group.

Order Fulfillment Stage	Description
Return	<p>If Order Management receives a partial return, then it separates the configured item into groups:</p> <ul style="list-style-type: none"> • One group includes the order lines that reference the items that Order Management received. It will move these lines to invoicing. • Another group includes the order lines that reference items that Order Management didn't receive or that it can't return for some reason.

Remnant Order Line

A remnant order line is an order line that hasn't shipped. It is part of a pick-to-order configured item where Order Management has only shipped some of the item's lines.

Assume you have configured item AS9000 Desktop Computer and it includes a separate order line for each configurable option:

- CPU0001, Central Processing Unit
- KB0001, Keyboard
- Mouse001, Mouse
- Monitor24, 24" High Definition Monitory

Assume Order Management ships the CPU0001, KB0001, and Mouse001 together in one box. The Monitor24 item is on backorder and hasn't shipped, so the order line that contains the Monitor24 item is a remnant order line.

If you drop ship the pick-to-order configured item, and if Order Management ships only part of the item, then all order lines in the item are remnant.

You can't cancel, revise, or return a remnant order line.

Related Topics

- [Split Order Lines](#)
- [How Order Management Fulfills Order Lines](#)
- [Ship Order Lines in Shipment Sets](#)
- [Create Sales Orders](#)

7 Troubleshoot Problems and Improve Performance

Fix Problems and Improve Performance

Order Management automatically fulfills most sales orders. However, if you encounter a problem, you can take an action on the order line to fix it and to improve fulfillment performance.

Do an Action on the Order Line

Do a manual action on the order line to fix a problem, improve performance, or do other tasks.

Action	Description
Schedule	<p>Schedule an order line if the orchestration process that references the line includes a manual scheduling step, or if the fulfillment line isn't scheduled.</p> <p>If you schedule an order line, then Order Management sends a request to the order promising process to schedule the fulfillment line.</p>
Unschedule	<p>Unschedule an order line to make supply available to a higher priority order line.</p> <p>If you unschedule an order line, then Order Management moves the orchestration process back to the scheduling step, sets the status to Awaiting Scheduling, and then releases supply so other order lines can use it.</p> <p>You must manually schedule an order line that you unschedule.</p>
Check Availability	See Use Availability to Manage Order Lines .
Split Line	<p>Split the fulfillment line to fulfill one part of the line from one warehouse, and another part from another warehouse. Use the analytics area to help identify the warehouse to use.</p> <p>For details, see Split Order Lines.</p>
Substitute	<p>Order Management displays the best substitution according to how your order administrator sets up substitution. Use the analytics area to help identify the item to substitute.</p> <p>To substitute an item that's part of a shipment set, you must remove the order line from the shipment set.</p>
Reserve	Reserve supply to make sure its available only for a specific order line. If you reserve supply, then Order Management removes it from availability so other order lines can't use it, then reserves it for the order line that you select.
Unreserve	Release supply so some other order line can use it, such as a higher priority order line that has an exception.

Action	Description
Hold	<p>Release a hold on an order line so processing can continue.</p> <p>If a hold exists on any part of an order line, then Order Management might not be able to complete the fulfillment process. A hold on part of an orchestration process can allow an order line to proceed, but it might arrive at a point where it stops and waits for a user to release it.</p> <p>For details, see <i>Use Holds to Temporarily Stop Processing</i>.</p>

Edit the Order Line

- Edit attributes on the order line to fix problems and improve performance.
- Remove the value from an order line attribute to allow Order Management to select the best fulfillment option without having to consider a specific value for the attribute.
- Remove values when you want to use Check Availability but don't want Order Management to consider a specific fulfillment requirement.

Edit the order line.

Attribute	Description
Source	Select Warehouse or Supplier in the Source option, then set the Warehouse or Supplier attribute.
Warehouse or Supplier	<p>Change the Warehouse or the Supplier that Order Management uses to source the item. Use the analytics area to help determine the warehouse to select.</p> <p>For details, see <i>Source Items from Different Warehouses</i>.</p>
Shipping Method	<p>Change the Shipping Method to a faster method.</p> <p>You can also add a check mark to the Clear Contents option immediately next to Shipping Method to allow Order Management to select the shipping method.</p>
Demand Class	<p>The Demand Class determines the priority that Order Management uses when it schedules the order line. Change the demand class when you must:</p> <ul style="list-style-type: none"> • Schedule order lines as a group. • Make sure some customers get supply before other customers. • Expedite fulfillment but the exact date isn't important. <p>Demand class applies only if the ATP (available to promise) rule uses supply chain search, and if Order Management uses allocation.</p>
Scheduled Ship Date or Scheduled Arrival Date	Set Override Schedule to Yes, then set the value in one of the date fields, such as 12/22/19. The orchestration process will reschedule order fulfillment according to the date you set.

Attribute	Description
	The orchestration process calculates the shipping schedule when you create a sales order, including the Scheduled Ship Date and the Scheduled Arrival Date. If you're aware of an alternative to this schedule, and if you know the best date to schedule the fulfillment line, then you might consider overriding these dates.

Improve Performance When You Search

If you find that it takes a long time for Order Management to search for your sales orders, then consider adding values to more attributes when you do your search. For example, if you search only on an address attribute and search takes a long time, then add values to other attributes on the order header, such as Customer or Order.

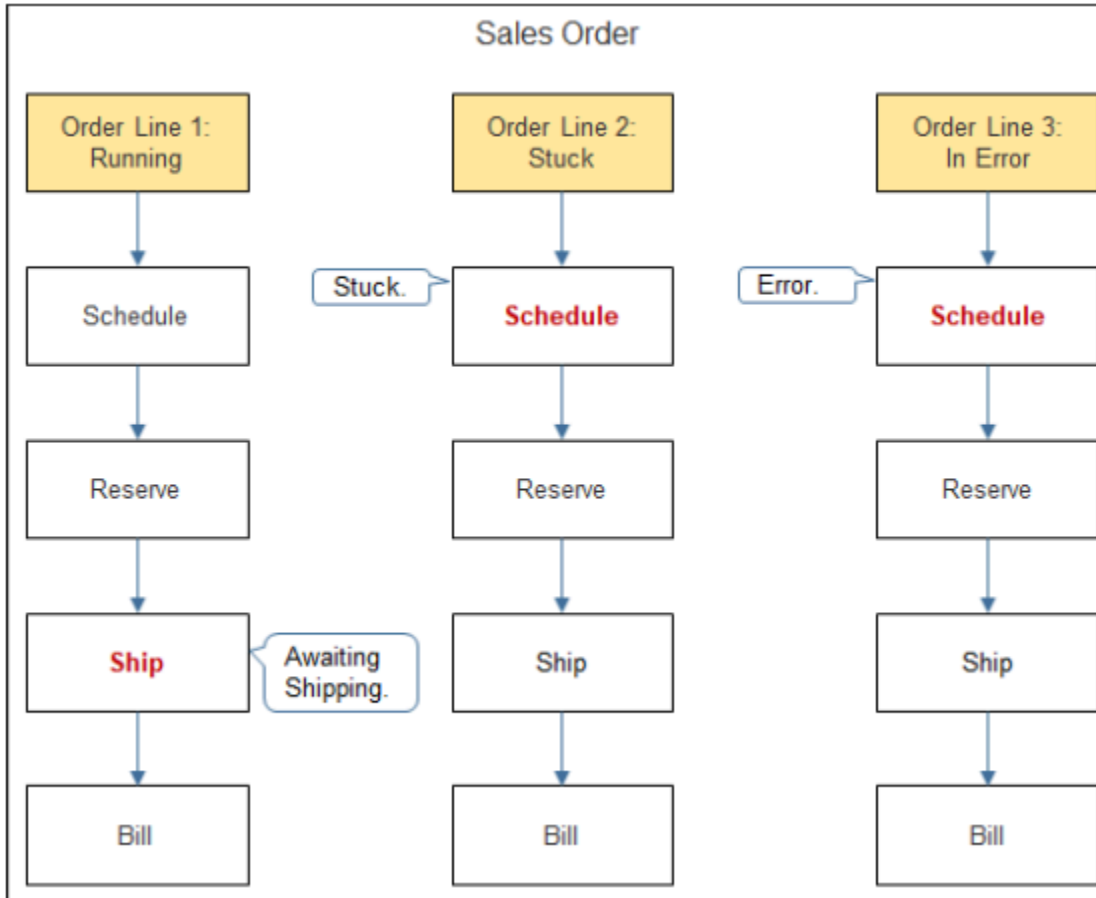
Related Topics

- [Source Items from Different Warehouses](#)
- [Split Order Lines](#)
- [Hold Your Sales Orders](#)
- [Why Order Management Disables Order Line Actions](#)
- [How Order Management Fulfills Order Lines](#)

Cancel Order Lines That Remain in Same Status

Cancel an order line that remains in order fulfillment for a long time, such as during Awaiting Shipping.

An order line that's stuck or in error can prevent the sales order from getting to a finished status:



Note

- Order line 1 finished the Reserve step, is running, and is awaiting shipping.
- Order line 2 is stuck on the Schedule step for some reason and can't proceed.
- Order line 3 encountered an error on the Schedule step and can't proceed.

You can revise the sales order to forcefully cancel lines that are stuck or in error.

Consider some examples:

- The order line remains in the same status for a long time. For example, you modify the order line, and your modification remains in the Change Pending status for several hours.
- An order line goes into error recovery because a compensation error happens, Order Management must revise the order line to recover the sales order, but can't revise an order line that's in error recovery.
- You submit an order line that includes a date that happens after the date that Order Management can use to plan the sales order. For example, you set the Scheduled Ship Date attribute to the year 2032 but you meant to use 2022. The orchestration process goes into error recovery. You must modify the Scheduled Ship Date, but Order Management doesn't allow you to modify the current revision of a sales order that's in error recovery.

- An error happens during drop ship:
 - You submit a sales order that uses drop ship but you don't include the supplier site.
 - Order Management sends the sales order to your procurement system.
 - The procurement system sets the supplier site to a default value when it converts the sales order into a purchase order, then, at some later point, sends a reply to Order Management to update sales order status.
 - Order Management can't find the supplier site that the procurement system set, so the sales order can't proceed and appears to be stuck in a perpetual fulfillment state.

These examples indicate that the sales order might contain an order line that's stuck or in error.

In this example, you cancel an order line that's stuck in the Awaiting Shipping status:

1. Sign in with a user role that includes the `fom_fix_exceptions_on_order_lines` privilege.

You need this privilege to use force cancel. Ask your order administrator for assistance.

2. Search for and open the sales order that includes the order line that's stuck.

For this example, assume the Status attribute of the order line has remained in Awaiting Shipping for several hours.

3. Click **Manage Orders**.

4. Create a revision.

5. Locate the order line that you must cancel.

6. Scroll toward the right until you can view the Actions drop down icon.

7. Click **Actions > Force Cancel Line**:

- Order Management changes Quantity on the order line to 0, and changes Status to another value, such as Cancellation Requested or Cancellation Pending. To monitor your request, click **Refresh** until Status contains Canceled.
- You can click **Force Cancel Line** again to retry the cancel.
- Force Cancel Line displays only if the order line is stuck or is in error.

If you find that a sales order remains in the Cancellation Requested status or Cancellation Pending status, then consider using Recover Order. For details, see [Fix Errors in Sales Orders](#).

Force Cancel Lines in Shipment Sets

You can't force cancel a line in a shipment set after you submit. Instead, cancel the sales order, then create a new one.

Assume you include two lines in a shipment set and submit. Line x contains the AS54888 computer and line y contains 1 Year Warranty for the computer. The computer is shippable but the warranty isn't. You include the warranty in the shipment set even though it isn't shippable so Order Management can bill the computer and the warranty at the same time.

Some time later, you revise line y to 2 Year Warranty, then submit. The status goes to Change Pending but never proceeds to Processing. You notice the change request goes on hold, and you encounter an error when you examine the message for the fulfillment task.

```
Service {SERVICE_NAME} request for task {TASK_INSTANCE_ID} failed due to a system error. (DOO-2685019)
```

You need to update only the warranty, so, to attempt to fix the problem, you use Force Cancel to remove line x and submit, but both lines remain at Change Pending.

To fix the problem, cancel the sales order. Create a new sales order, then add your shipment set with your revised values.

Force Compensation

If you have an order line that's stuck because of a scheduling or reservation problem, then you can force Order Management to compensate the line and see if it can fix the problem.

Order Management normally uses compensation rules to determine what adjustments to make when you revise a sales order. For details, see [Compensate Sales Orders That Change](#).

In some cases, you can force Order Management to compensate and see if it fixes the problem.

Try it.

1. Sign in with a user who has the FOM_FIX_EXCEPTIONS_ON_ORDER_LINES privilege.
2. Create a revision for the sales order that's stuck.

If the order has a line that's open, that you can't update or cancel, that isn't in a wait state, and that's been stuck for at least 90 minutes, then you'll see a message.

```
A problem occurred while processing order lines. Examine the lines that are in error, edit them or forcefully cancel them, then submit them. The submit action will attempt to process all error lines and resolve the problem.
```

3. Modify the line, then submit.

Note

- Order Management will compensate each order line that's stuck, and it will compensate even if you don't edit or modify the line, and even if the line is in Change Pending status.
- You can only compensate lines that are stuck because of a scheduling or reservation problem.
- If the problem happens outside of Order Management, then you must fix the problem before you revise the sales order. For example, assume the line gets stuck because on-hand quantity isn't available to reserve in the warehouse, so the line gets stuck on the reservation task. To fix this problem, you need to make sure quantity is available before you revise the sales order.

Other Guidelines

If you don't have the privileges that you need to do an action, then Force Cancel might not work. Assume a sales order is on hold, you try Force Cancel, but it fails because the order is locked. You might need to get the privileges that allow you to release a hold, or you might need to ask the person who applied the hold to release it, and then try Force Cancel.

Related Topics

- [How Order Management Processes Change Orders](#)
- [Create Sales Orders](#)
- [Return Sales Orders](#)

Recover Sales Orders That Are Locked or Not Started

See how you can recover sales orders that are locked in Draft status or that are stuck in Not Started status.

Recover Orders That Are Locked

Assume you submit a sales order, then Order Management locks it during validation. If validation fails, then Order Management changes the status back to Draft and unlocks the order. In some rare instances, the order might unexpectedly go into Draft, locked status for a long time, and you might encounter an error.

`Order Management can't process the change request because it's still processing the sales order. The order is currently in DOO_DRAFT status. Try again later.`

You can unlock it.

Assume you need to unlock draft order 507030 for the Computer Service and Rentals customer.

1. Wait for 30 minutes after you submit the order.

You must wait. Order Management won't attempt to unlock a draft, locked order until 30 minutes after you submit the order.

2. Sign into Order Management with the Order Manager role or the Error Recovery role.

Make sure the role includes the FOM_FORCE_UNLOCK_ORDER_PRIV privilege. Ask your order administrator for assistance.

3. Click **Manage Orders**.
4. Search for sales order 507030.
5. On the order header, make sure the order is in Draft, locked status.
6. Click **Actions > Force Unlock**.

This action only displays 30 minutes after you submit the order, and only with a new sales order. You can't unlock a revised sales order.

7. Click **OK** in the warning that displays, then click **Refresh**.
8. Verify that Order Management removed the lock and you can edit the sales order.

Unlock Right Away

You can use Force Unlock on sales orders that are locked and also in Draft status, but only until at least 30 minutes after the last update. If you can't wait that long, then run the Recover Errors scheduled process. Continuing our example, you would use these values:

Parameter	Value
Orchestration Order Number	507030
Order Orchestration Function	Start Orchestration

The Start Orchestration function will restart the orchestration process for each locked, draft order as soon as you submit the scheduled process. If the restart is successful, then the orchestration process will clear the lock, set the order's

status to Processing, and submit the order to fulfillment. For details about Recover Errors, see *Fix Errors in All Sales Orders*.

For another example, assume you have 3 draft orders that are in locked status, and the Ordered Date for all of them is 10/18/23 10:10 AM. Here are your values:

Parameter	Value
From Ordered Date	10/18/23 10:09 AM
To Ordered Date	10/18/23 10:11 AM
Order Orchestration Function	Start Orchestration

Make sure you specify From Ordered Date and To Ordered Date parameters to within a few minutes of the Ordered Date on the sales orders. This will filter the orders that the scheduled process must consider.

Recover Orders or Lines That Aren't Started or Get Stuck

You might encounter sales orders or order lines that remain stuck when you create or revise the order, or do an action, such as split or schedule an order line. For example, you notice that the Actual Start Date attribute remains empty on the order line and the line never proceeds through fulfillment, or the line remains in Not Started status after you do an action.

To recover from these errors, we recommend that you run the Recover Errors scheduled process with these values:

Parameter	Value
Order Orchestration Function	Start Orchestration
Scope	Order Fulfillment Errors

The scheduled process will attempt to recover these stuck orders and lines. Note that it will only consider orders and lines that are not started after at least 90 minutes since the last update on the order or line.

You can also use the Order Number parameter to filter for a specific sales order, or the From Ordered Date and the To Ordered Date parameters to filter according to a date range.

Examine Error Messages for Sales Orders

Order Management displays exceptions that cause an error so you can view exception details and history, then fix the problem.

Order Management displays an exception when an error happens in Order Management or in some other application, such as a billing application. You can use the Manage Order Orchestration Messages page to view exceptions, such as order line exceptions.

Order Management Receives a Warning

Assume you're an order manager at a company that manufactures tables:

1. You notice a sales order for 100 burl tables.
2. Order Management scheduled and confirmed the reservation for the order line for the sales order.
3. The orchestration process sent a shipment request to the shipping system.
4. Personnel at the warehouse ask the sales representative to hold the shipment because a fire happened in the warehouse.
5. The sales representative applies a hold on the sales order, then sends the hold request to Order Management.
6. The shipping system can't apply the hold because someone already picked and released the sales order.
7. The shipping system sends a warning to Order Management, and Order Management rejects the hold request.
8. The sales representative calls you on the phone to discuss the rejected hold request.
9. You investigate:
 - o Click **View All Actions > Manage Order Orchestration Messages**.
 - o Set the Order Orchestration Function to `Equals Manage Hold`, then click **Search**.
 - o Examine the details and explain the reason for the rejection.

Order Management Rejects a Change Order

You are an order manager at a company that manufactures stainless steel pipe:

1. You create a sales order for 100 pipes.
2. The customer calls to change the order quantity a few days after Order Management sends the shipment request to the shipping system.
3. You modify the sales order, then submit the change order.
4. The shipping system already shipped the sales order, so Order Management rejects the change order and saves the error details.
5. You use the Manage Order Orchestration Messages page to examine the order details, and to search for and access the sales order so you can determine the reason for the rejection.

Assignment Rules are Missing

You are an order manager at a company that provides digital network service:

1. Order Management receives a source order, but doesn't assign an orchestration process to it because the process selection rules are missing.
2. You view the exception on the Manage Order Orchestration Messages page, and notice that the same error affects more than one sales order.
3. You notify your order administrator, who then adds the process selection rules.
4. Some time later, the order administrator uses the Error Recovery privilege to run the assign and launch process.
5. Order Management assigns the orchestration processes to the sales orders.

Related Topics

- [How Order Management Fulfills Order Lines](#)

Fix Problems That Happen When Assigning Orchestration Processes

Order Management assigns a sales order to one or more order lines during order fulfillment, then attempts to assign an orchestration process to an order line or group of order lines. If a system failure happens or if a problem happens with an

For example, Order Management can't assign an orchestration process if a rule that references the data set for the sales order doesn't exist, or if your order administrator hasn't set the default orchestration process.

1. Make sure you have the privileges that you need to manage error recovery.
2. Go to **Home > Order Management > Order Management (New) > View All Actions > Manage Order Orchestration Messages**.
3. Examine the messages.

If you can't resolve the problem, contact your order administrator and request to edit the assignment rules. For background, see [Guidelines for Assigning Orchestration Processes](#).

Reassign the Orchestration Process During Revision

Order Management can't reassign an existing order line to a different orchestration process when you revise a sales order.

For example, assume you create a return and set the Return Type on the order line to Return for Credit and Return the Item, then submit. Order Management assigns your return line to a predefined orchestration process that handles receiving and billing. Some time later, your customer calls to inform you that the item was destroyed in a fire and requests to simply dispose it rather than physically return it. So, you revise the sales order and set Return Type to Return for Credit. Order Management doesn't reassign the order line to an orchestration process that handles billing but not receiving. It continues to use the orchestration process that handles receiving and billing, so it might attempt to receive the item but you don't want to do that.

To avoid this problem, don't revise the return. Cancel it, then create a new return and set the Return Type as needed.

Related Topics

- [How Order Management Fulfills Order Lines](#)

Fix Errors in Sales Orders

Order Management usually finishes order fulfillment for each sales order without error. If an error does happen, you can use various features to fix it.

The Order Management work area might display a message that mentions recovery, such as:

- `One or more actions for sales order 58476 failed. Use recover task, recover order, or recover process to recover the failed tasks for the order.`

- **Orchestration process 300100174767143 failed. Use recover task, recover order, or recover process to recover the failed tasks for the process.**
- **Task 300100174767143 for orchestration process 300100174767135 failed. Use recover task, recover order, or recover process to recover the failed task or process.**

Or it might display a message that indicates a temporary problem happened in the network or with a server:

- **The request failed. Orchestration process 300100098837243 for sales order 482655 didn't start because it isn't deployed or the server isn't available. Deploy the orchestration process. Make sure the server is up and running.**

You can use a recover action to attempt to fix these problems.

Example of an Error That You Can Recover From

Assume you encounter an error:

Manage Orders

Search Results

Actions ▾

Exception Type	Order
	404087

Click the Exception

Warning

Actions ▾ View ▾

Reported Time	Order Orchestration Function	Process Name	Orchestration Process Number	Task Name	Task Type	Task Service
12/23/18 2:36 AM	Fulfillment task	DOO_OrderFulfi...	3001001747509...	Ship Back-to-Back Goods	Shipment	Create Shipping
12/23/18 2:35 AM	Fulfillment task	DOO_OrderFulfi...	3001001747509...	Ship Back-to-Back Goods	Shipment	Cancel Shipping

Rows Selected 1 Columns Hidden 8

Click

Fulfillment task: Messages

View ▾ Format ▾ Freeze Detach Wrap

Message Type **Message**

```
com.oracle.bpel.client.BPELFault: faultName: {{http://schemas.oracle.com/bpel/extension}remoteFault} messageType: {{http://schemas.oracle.com/bpel/extension}RuntimeFaultMessage} parts: {{ summary=<summary>oracle.fabric.common.FabricInvocationException: Unable to invoke endpoint URI "http://fa-internal.oracleoutsourcing.com:10663/fscmService/CommonProcessService" successfully due to: javax.xml.soap.SOAPException: Message send failed: Read timed out</summary> ,detail=<detail>Unable to invoke end "http://fa-internal.oracleoutsourcing.com:10663/fscmService/CommonProcessService" successfully due to: javax.xml.soap.SOAPException: javax.xml.soap.SOAPException: Message send failed: Read timed out</detail> ,code=<code>null</code>}}
```

Web service not available

Try it:

1. Go to **Home > Order Management > Order Management (New) > View All Actions > Manage Orders**.
2. Search for and identify a sales order that's in error.

The Exception Type column displays a red circle with an x inside it to indicate whether the sales order is in error. Click the **red circle**.

3. In the Warning dialog, notice that there are two errors. Click the **error** that happened when the orchestration process was running a fulfillment task at 2:35 AM. It's the second one in the list.
4. Notice the big, very technical message. It describes how the fulfillment task couldn't communicate through the web service that it uses to get shipping details from your shipment system.

Manage Orders

Search Results

Actions ▼

Exception Type	Order
	404087

Click the Exception

Warning

Actions ▼

Reported Time	Order Orchestration Function	Process Name	Orchestration Process Number	Task Name	Task Type	Task Service
12/23/18 2:36 AM	Fulfillment task	DOO_OrderFulfi...	3001001747509...	Ship Back-to-Back Goods	Shipment	Create Shipping
12/23/18 2:35 AM	Fulfillment task	DOO_OrderFulfi...	3001001747509...	Ship Back-to-Back Goods	Shipment	Cancel Shipping

Rows Selected 1 Columns Hidden 8

Click

▲ Fulfillment task: Messages

View ▼ Format ▼ Freeze Detach Wrap

Message Type	Message
	Task 300100174767143 for orchestration process 300100174767135 failed. Use recover task, recover order, or recover process to recover the failed task or process.

Its telling you to try to recover

Try it:

1. Click the **error** that happened at 2:36. It's the first one in the list. It references a Create Shipping task. The task failed because of the first, underlying error that at happened at 2:35. The orchestration process can't create shipping if it can't communicate with your shipping system.
2. Notice the message. It's recommending that you try a recover action.

It's possible that the 2:35 error happened because the network was temporarily down, a sever was down or not available, and so on, which then led directly to the 2:36 error. These types of problems are often temporary and fix themselves or get fixed by someone in a few minutes. It's a good candidate for recovery because the problem might be fixed by the time recover runs.

Restart Processing After You Fix Errors

Use a recover action to restart processing:

- Fix the cause of the error before you recover.
- Make sure you have the privileges that you need to manage error recovery and to do a recover action.
- Use a general to specific sequence:
 - a. Attempt to recover the sales order first.
 - b. If recovering the sales order doesn't fix the problem, then recover the orchestration process.
 - c. If recovering the orchestration process doesn't fix the problem, then attempt to recover the task in the orchestration process.

Recover Order

Recover Order runs an orchestration process or fulfillment task starting immediately before the point where the error happens. Use it to recover from various errors, such as an orchestration process that doesn't start, or an orchestration process or fulfillment task that's in error:

- This feature is available only when an error happens in a sales order.
- You can recover more than one sales order at a time. For details, see these topics:
 - [Fix Errors in More Than One Sales Order](#)
 - [Fix Errors in All Sales Orders](#)

Try it:

1. Make sure you have the privileges that you need to manage error recovery and to do a recover action.
2. Click **View All Actions > Manage Orders in Error**.
3. Search for the sales order you must recover.
4. In the search results, click a **row**, then click **Actions > Recover Order**:
 - Recover Order will attempt to recover each line in the sales order that has an error.
 - The status determines whether you can attempt to recover a sales order. For example, if the Status attribute displays Processing, then you can attempt to recover the sales order, but you can't recover a sales order when the status is Closed.

Recover Orchestration Processes

- Recover Process runs the orchestration process starting immediately before the point where the error happens.
- It attempts to recover an orchestration process that failed when there's an error that's internal to the process. For example, an error that happens when:
 - Order Management runs an orchestration process step.
 - The process runs a fulfillment task, such as an error that happens when Order Management sends a request to a fulfillment system that's in an error state.
- You can select one or more orchestration processes to recover.
- Use this feature to recover all the fulfillment tasks that an orchestration process references for a single sales order.

Try it:

1. Click **View All Actions > Manage Orchestration Processes**.
2. On the Manage Orchestration Processes page, search for the orchestration process that you must recover.

To filter for messages that contain an error, set Message Type to Error.

3. In the search results, click a **row**, then click **Actions > Recover Process**.

Recover Fulfillment Tasks

Recover Task runs the fulfillment task starting immediately before the point where the error happens. Use it to fix an error that happens when Order Management attempts to send a request to your fulfillment system:

- This feature is available only when a fulfillment task fails.
- To recover more than one fulfillment task, select more than one orchestration process or sales order, then use Recover Process or Recover Order.

Try it:

1. Click **View All Actions > Manage Orchestration Processes**.
2. On the Manage Orchestration Processes page, search for the orchestration process that references the fulfillment task you must recover.

To filter for messages that contain an error, set Message Type to Error.

3. In the search results, in the Orchestration Process Number column, click a **link**.
4. On the Orchestration Process page, on the Orchestration Plan tab, click the **row** that displays the fulfillment task you must recover, such as FulfillOrder.
5. Click **Actions > Recover Task**.

Assign Order Lines to Orchestration Processes

Assign Lines to Process attempts to assign an order line to an orchestration process. Use it to assign order lines that Order Management didn't assign.

Fix Errors That Happen with Web Services

The Manage Web Service Details page can reference services on an order capture system or fulfillment system that resides outside of Order Management. You can attempt to fix errors that happen when Order Management calls more than one service on the same system but can't communicate with them for some reason.

Try it:

1. Make sure you have the privileges that you need to administer Order Management.
2. Go to the Setup and Maintenance work area, then go to the task:
 - Order Management
 - Orders
 - Manage External Interface Web Service Details
3. On the Manage Web Service Details page, add a separate row for each service that Order Management must call.

Use the same user name and password for each row that references the same system.

For example, assume an order capture system named ORA_BM_CPQ must communicate with Service_A and Service_B, and that the user name for this system is CPQ_user, and the password is CPQ_password. Here are the rows that you add:

Target System	Connector Name	User Name	Password
ORA_BM_CPQ	Service_A	CPQ_user	CPQ_password
ORA_BM_CPQ	Service_B	CPQ_user	CPQ_password

Fix Errors That Happen Outside of Order Management

The Error Happens When	Solution
A source order fails during order import.	Fix the error, then reimport the source order.
Order Management processes a reply from the fulfillment system.	Fix the error, then resubmit the reply.
Oracle Enterprise Manager identifies as recoverable.	Fix the error, then use Oracle Enterprise Manager to recover the error.
<p>There's a problem on the server or the network goes down.</p> <p>For example, I create and submit a sales order, a system outage happens, I create a revision, make some changes on the order and resubmit, but then an order line gets stuck. The line is in Shipped status but the orchestration process is stuck on the Create Invoice step.</p>	Create a revision but don't make any changes, then submit it. Verify that the line moves to billing and gets invoiced.

Related Topics

- [How Order Management Fulfills Order Lines](#)
- [Fix Errors in More Than One Sales Order](#)
- [Cancel Order Lines That Remain in Same Status](#)
- [Fix Errors in All Sales Orders](#)

Fix Errors in More Than One Sales Order

Use Recover Order to fix errors in a single sales order.

You can use this feature only to fix sales orders that you can select in the Order Management work area's search results and in that work area's classic pages. This topic describes how to fix all the sales orders that the search returns, not only the sales orders you can individually select:

1. Fix the problem that causes the error.
If you don't fix the problem, then the same error will continue to happen whether or not you run recovery, and running recovery won't restart processing.
2. Click **View All Actions > Manage Orders in Error**.
3. On the Manage Orders in Error page, enter a value in a required attribute, then click **Search**.
4. In the search results, in the heading row, click the **narrow column** immediately to the left of the Order column heading.
This step selects all sales orders in the search results.
5. Click **Actions > Take Action On All Search Results**, then click **Recover Orders**.
Order Management attempts to fix all errors in the sales orders.
6. If necessary, repeat step 5.
Order Management can fix up to 5,000 sales orders each time you click Recover Orders. If more than 5,000 sales orders contain errors, then you must click Recover Orders repeatedly until it fixes all sales orders that the search returns.
Use a single action that fixes all errors. For details, see [Fix Errors in All Sales Orders](#).

Related Topics

- [Fix Errors in Sales Orders](#)
- [Examine Error Messages for Sales Orders](#)
- [How Order Management Fulfills Order Lines](#)
- [Fix Errors in All Sales Orders](#)

Escalate Problems You Can't Resolve

Escalate problems that you can't resolve to your order administrator. When you escalate, make sure you mention the topic that the administrator can use to resolve problem. This will help the administrator to efficiently diagnose and fix it.

Problem	Details Your Administrator Can Use to Resolve the Problem
The Warehouse attribute is empty or doesn't contain the warehouse I need to pick.	Resolve Problems with the Warehouse Attribute on Sales Orders Overview of Collecting Promising Data for Order Management
I encounter an error similar to one of these. The request failed because scheduling for an item isn't set up correctly.	Troubleshoot Global Order Promising for Order Management

Problem	Details Your Administrator Can Use to Resolve the Problem
<p>Task 30000000003162606 for orchestration process 30000000003162602 failed. Use the appropriate Order Orchestration work area action to recover this task.</p> <p>The item passed to order promising was not found in any organization. Verify the item definition.</p> <p>You can't use an attribute with a value as a configurable option for a configured item.</p>	