

## R12.2 Oracle Order Management Fundamentals

**Duration:** 4 Days

### What you will learn

This R12.2 Oracle Order Management Fundamentals training teaches you how to perform the basic order capture and order fulfillment flows that Oracle Order Management facilitates. Participate in hands-on activities to solidify new skills; use the functionality described in the class and apply it to your daily job.

Learn To:

Set up Oracle Order Management.

Manage exceptions and holds.

Use key order flows.

Set up inventory, receivables, shipping execution, and basic pricing functionality.

Define credit checking.

Create price lists.

Define processing constraints, transaction types, defaulting rules, order holds, and user defined attributes at the order header and line level that enable you to record additional information on the sales order.

Create subinventories, units of measure, and items.

Create customers, payment terms, and defining credit checking.

Create price lists, as well as discount and freight and special charge list modifiers.

Set up shipping execution, including freight carriers, freight cost types, document sets, and container load details.

### Benefits to You

By investing in this course, you will develop a deeper understanding of the basic order capture and order fulfillment flows that Oracle Order Management facilitates. You'll also learn how to perform required setup steps. These steps include creating customers, transaction types, defaulting rules, and price lists. This course also includes information about enabling multiple organization access control (MOAC), specifically for Oracle Order Management.

### Audience

End Users

Functional Implementer

### Related Training

*Required Prerequisites*

E-Business Suite Essentials for Implementers

Navigating Oracle Applications

## R12.2 Oracle E-Business Suite Fundamentals

### *Suggested Prerequisites*

Financials Functional Foundation

Inventory Management Fundamentals

R12.x Oracle Financials Functional Foundation

### **Course Objectives**

Create and use price lists, modifiers, qualifiers, and price books

Explain shipping flows within the order-to-cash lifecycle

Set up and use shipping entities to perform shipping-related activities

Set up multiple organization access control for Oracle Order Management

Define subinventories, units of measure, and items

Define item orderability rules

Define user defined attributes for orders and lines

Define customers, invoice information, and credit checking

Explain tax-related setup steps

Set up profile options and system parameters

Set up processing constraints, defaulting rules, and transaction types

Use scheduling and workflow

Define holds

Purge orders

Manage exceptions

Execute the order-to-cash lifecycle with different order types

### **Course Topics**

#### **Overview of Oracle Order Management**

Overview of Oracle Order Management

What is Oracle Order Management?

Order Capture and Order Fulfillment

Oracle Order Management Capabilities

Order to Cash Lifecycle

Integration with Other Products

### **Order Entities and Order Flows**

Order to Cash Lifecycle with Standard Items

Order to Cash Lifecycle with PTO Models and PTO Kits

Drop Shipments

Drop Shipments Across Ledgers

Back-to-Back Orders

Managing IR-ISO Changes

Sales Agreements

Negotiation Agreement

### **Order Processing**

Entering Order Header Main Information

Entering Order Header Additional Information

Entering Order Lines

Booking an Order

Applying Sales Credits

Splitting Orders

Copying Orders

Using Order Organizer

### **Multiple Organization Access Control Setup**

Organization Structure in Oracle Applications

Using MOAC in Oracle Order Management

Setting Up MOAC

### **Oracle Inventory Setup for Oracle Order Management**

Receipt to Issue Lifecycle

Inventory Organizations

Setting Up Locations

Inventory Organization Structure

Interorganization Shipping Networks

Shipping Method

Units of Measure

Uses of Units of Measure

### **Oracle Receivables Setup for Oracle Order Management**

Overview of Trading Community Architecture

Key Customer Related Concepts in TCA

Adding Customers in Order Management

Defining Payment Terms

Defining Invoicing and Accounting Rules

Overview of Credit Checking

Defining Credit Checking on the Customers Page - Profile Tab

Defining Credit Checking on the Customers Page - Profile Amounts Tab

### **Oracle Order Management Setup Steps**

Order Management Setup Steps

Profile Options and System Parameters

- Overview of QuickCode or Lookup Types
- Defining QuickCode or Lookup Types
- Overview of Order Header and Order Line Processing Flows
- Overview of Transaction Types Window
- Workflow in Transaction Types
- Overview of Document Sequences for Order Numbering

### **Holds, Order Purge, and Exception Management Setup**

- Holds
  - Seeded Holds
  - Automatic Holds
  - Generic Holds
  - Specifying Holds Framework
  - Hold Sources
  - Order and Quote Purge
  - Purge Sets

### **Basic Pricing Setup**

- Overview of Pricing in the Order to Cash Process
- Creating a Price List
- Secondary Price List
- Copy Price List
- Price List Maintenance: Overview
- Add Items to Price List
- Manual Price List Updates
- Implementation Steps: Setting Key Profile Options

### **Overview of Shipping Execution**

- Shipping Execution Flow
- Delivery and Delivery Lines
- Trips and Stops
- Delivery Leg
- Containers/LPNs
- Pick Release
- Move Orders
- Pick Confirmation