Oracle SCM Cloud

Order Management and Fulfillment

Activity Guide

Important!

You’ve been assigned a unique, two-digit student number for this course. In the following pages, wherever you see “xx,” substitute your student number.

Note: Your student number is valid only for the duration of the course.

Demo for Lesson 3: Importing Orders

Demo 3-1: Setting Up Sequences for Sales Order Numbers

Overview

In this practice, we'll set up sequences for sales order numbers.

Prerequisites

The Retain Sales Order Number profile option is set to No. This is the default value.

User Login

scm00.instructor

Tasks

1. From the **Navigator**, select **Others** and then **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, click the **Tasks** panel tab and select **Search**.

3. On the **Search** page, search for the Manage Document Sequences task. Select the task.
4. On the **Manage Document Sequences** page, search for this document sequence name: ORA_FOM_DOC_SEQUENCE_AUTO
5. Next to the document sequence name that appears in the search results, click the **Expand** icon. Enter or select the values listed in the table:

Field or Column	Value
Initial Value	1000
Display	Ignore this attribute. Don't set it. It's for internal use only.
Start Date	01/01/19
End Date	Leave empty. Order Management will continue to increment the sales order number in perpetuity.
Audit	Leave empty
Display Message?	Leave empty

When you use ORA_FOM_DOC_SEQUENCE_AUTO, Order Management uses a predefined number sequence to create order numbers, starting with the value you set here. If you want to change the initial value, you must enter a number greater than the last generated number from the sequence.

6. Click **Cancel**. We don't want to change the numbering in this environment.

Demo Complete

We've set up sequencing for the numbering of sales orders and indicated when this setting takes effect.

Practices for Lesson 3: Importing Orders

Practices for Lesson 3

Overview

In these practices, you'll learn how to import orders using the file-based data import method.

First, you must run session warmers.

Running Session Warmers

The first time you access the environment each week, run session warmers to improve environment performance. Running session warmers before you start any of the scripts ensures the best performance. To run the session warmers, follow these steps:

a. In your browser, enter the URL for the training environment for your event.

b. Sign in to the application using your assigned username and password.

c. Open a new browser tab and go to the URL for the training environment.

d. Do one of the following:

   - If you are on the Environment Landing page, then click **Demo Tools.**
   - If you are on the Sign In page, then go the Environment Landing page and click **Demo Tools**. To do this, locate the Environment Landing page by replacing the text after oracledemos.com in your URL with/main.html#!/main. For example, if your Sign In page URL looks like this:

     https://adc-fap14xx-fa-ext.oracledemos.com/fscmUI/faces/FuseWelcome?fndThemeName=Vision

     Then your Environment Landing page URL looks like this:

     https://adc-fap14xx-fa-ext.oracledemos.com/main.html#!/main

e. Click **Session Warmers**, and then click **SCM**.

f. Click **Supply Chain Management - Core**. A dialog box opens. Allow the session warmers to run until the dialog box closes on its own. You can ignore any messages in the dialog box.

g. Click **Supply Chain Planning**. Wait until the dialog box closes on its own.

h. Close the Environment Landing page tab and begin your work in the environment.

Practice 3-1: Importing Orders Using the File-Based Method

Overview

You're an order administrator for Vision Corporation. You work with a distributor, who sends orders in bulk every night.

This practice shows how you, an order administrator, upload an order file received from a distributor, transfer the data to the interface tables, and start the processing that transforms and submits the order.

Prerequisites

None. For more information about file-based data import, see the File-Based Data Import for Oracle Supply Chain Management Cloud guide.

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Prepare the Upload File
- Navigate to the File Import and Export Page
- Upload a File Containing Multiple Orders
- Load File Data to the Interface Tables
- Transform the Interface Table Data and Load the Base Tables

Tasks

Prepare the Upload File

1. Locate the file for this activity: filename **SourceSalesOrderImportTemplateOU.xlsm**. Oracle University students: you can find the file in the remote desktop's file directory at **D:\labs\order management**.
2. Open the supplied Excel file, and update it by finding and replacing the values as follows:
   a. In the Excel menu, select **Find & Select**. Click the **Options** button. Insert the values in Find What, Within, and Match Case. Click the **Replace** tab. Enter the **Replace With** value as follows:

Field	Value
Find What	STUORDER exactly as it is
Within	Workbook
Match Case	Selected
Replace With	SCMXXORD, where XX is your student number

b. Click **Find Next**. Replace the value in all worksheets except DOO_ORDER_CHARGES_INT and DOO_ORDER_CHARGE_COMPS_INT. Replace the Source Transaction Identifier in these worksheets with SCMXXOED instead.

c. Search again. Keep all selections in the Find options except for these:

   1) Find What: STUDENT exactly as it is

   2) Replace With: STUDENTXX. Insert your student number for XX.

d. Search for Batch Name. Replace STUBATCH1 with STUXXBATCH1 globally.

The following table shows the fields that you modified when you made the changes as indicated in the previous few steps. The table shows the new values.

Tab (Worksheet) Name	Field Name	Value
DOO_ORDER_HEADERS_ALL_INT	Source Transaction Identifier	SCMXXORD01 SCMXXORD02 SCMXXORD03
DOO_ORDER_HEADERS_ALL_INT	Source Transaction Number	STUDENTXX01 STUDENTXX02 STUDENTXX03
DOO_ORDER_HEADERS_ALL_INT	Batch Name	STUXXBATCH1
DOO_ORDER_LINES_ALL_INT	Source Transaction Identifier	SCMXXORD01 SCMXXORD02 SCMXXORD03
DOO_ORDER_ADDRESSES_INT	Source Transaction Identifier	SCMXXORD01 SCMXXORD02 SCMXXORD03 Repeat each order number, so that each order number is mapped to one bill-to address and one ship-to address.
DOO_ORDER_DOC_REFERENCES_INT	Document Identifier	SCMXXORD01
DOO_ORDER_CHARGES_INT	Source Transaction Identifier	SCMXXOED02
DOO_ORDER_CHARGE_COMPS_INT	Source Transaction Identifier	SCMXXOED02

As you can see, the identifiers match between worksheets, except for the last two.

The following screenshot shows part of the DOO_ORDER_ADDRESSES_INT worksheet. Note the Source Transaction Identifier column. SCM05ORD01 appears in rows 5 and 6. SCM05ORD02 appears in rows 7 and 8. SCM05ORD03 appears in rows 9 and 10.

Addresses Interface

Notes. 1: * = Required. 2: **=Make sure you include at least one value for each color group.

* Source Transaction Identifier	* Source Transaction System	Source Transaction Line Identifier	Source Transaction Schedule Identifier	* Address Use Type
SCM05ORD01	LEG1	1	101	SHIP_TO
SCM05ORD01	LEG1	1	101	BILL_TO
SCM05ORD02	LEG1	1	101	SHIP_TO
SCM05ORD02	LEG1	1	101	BILL_TO
SCM05ORD03	LEG1	1	101	SHIP_TO
SCM05ORD03	LEG1	1	101	BILL_TO

3. Save the Excel file as SCM<XX>SalesOrders.xlsm in a new folder on the desktop.
4. Navigate to the "**Instructions and CSV Generation**" tab in the Excel file. Make sure active content is enabled.
5. Click the **Generate CSV File** button.
6. Follow the prompts, saving zip file as SCM<XX>SalesOrders.zip. Save each csv file that you are prompted to save.

   Note: Make sure you have Modify access to make these changes.
7. Click **OK** when a confirmation message appears confirming the creation of the new files.

Navigate to the File Import and Export Page

8. From the **Navigator**, select **Tools**, and then click **File Import and Export**.

Upload a File Containing Multiple Orders

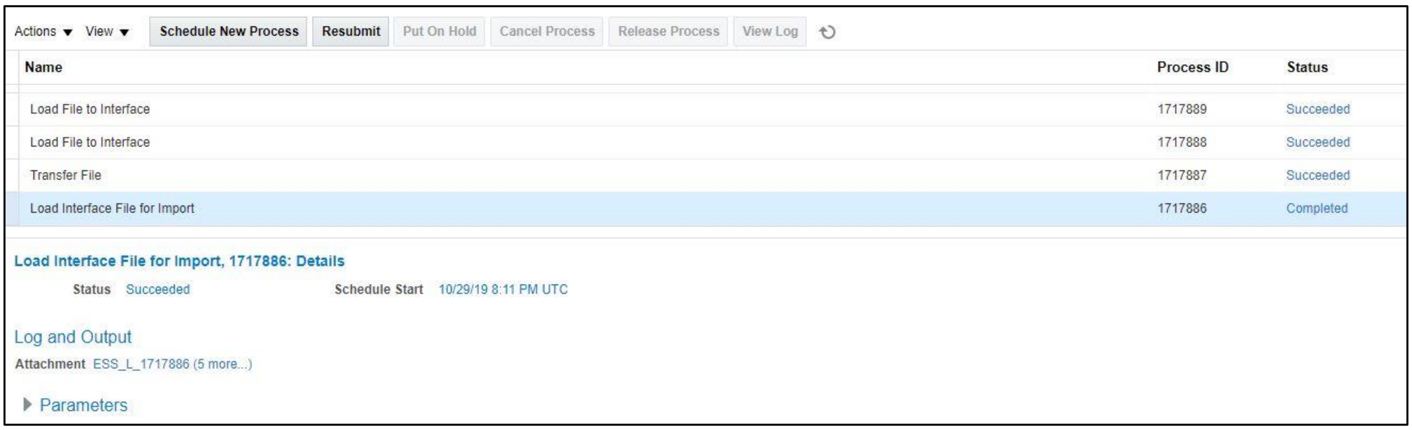
9. On the **Overview** page, in the **Search Results** section, click the **Upload** icon.
10. In the **Upload File** dialog box, click **Choose File**, and then select the file you want to upload. (SCM<XX>SalesOrders.zip).
11. Select scm/sourceSalesOrder/import from the **Account** list.
12. Click **Save and Close**. Your file is uploaded and appears in the **Search Results** region.

Load File Data to the Interface Tables

13. From the **Navigator**, select **Tools**, and then click **Scheduled Processes**.
14. On the **Overview** page, click the **Schedule New Process** button.
15. In the **Schedule New Process** dialog box, click the **Name** list, and then click the **Search** link at the bottom.
16. In the **Search and Select** dialog box, in the **Name** field, enter: `Load Interface`. Click **Search**.
17. Select **Load Interface File for Import,** and then click **OK**.
18. Click **OK** in the **Schedule New Process** dialog box.

19. In the **Process Details** dialog box, in the **Import Process** field, select Import Sales Orders. It's near the bottom of the list of values.
20. Select the file you uploaded in the **Data File** field.
21. Click **Submit**.
22. In the Confirmation message, note the process ID, and then click **OK**. On the **Overview** page, expand the Search area, if necessary, and click **Search** to refresh the view. You should see your process running.

When the process ends, the page displays a status of Succeeded, which means that you loaded the file data to the interface tables. You can examine the log file.



Transform the Interface Table Data and Load the Base Tables

23. On the **Overview** page, click **Schedule New Process**.
24. In the **Schedule New Process** dialog box, click the **Name** list and then click the **Search** link at the bottom. If the **Name** list doesn't open, then log out and log in again.
25. In the **Search and Select** dialog box, in the **Name** field, enter: `Import Sales Orders`. Click **Search**.
26. Select **Import Sales Orders** and then click **OK**.
27. In the **Schedule New Process** dialog box, click **OK**.
28. In the **Process Details** window, enter the exact batch name you entered in step 2 in the **Batch Name** field.
29. Click **Submit**.
30. Write down the process ID because you need it for the next practice. Click **OK** to close the confirmation specifying the process ID.
31. Close the **Process Details** dialog box.
32. Click the **Refresh** icon to refresh the view. You should see your process running.

When the process ends, "Error" appears in the Status column. One sales order was imported successfully, while two others weren't. Examine the log file for the subprocess to see the issues. If you decide to repeat the practice, you must change the batch number each time.

Practice Complete

You’ve successfully imported an order. Note that a process may end with an error, even if only -one order had an error. Orders without errors are imported successfully.

Practice 3-2: Examining the File-Based Import Template and Data File

Overview

In this practice, you view the data in the file that was used for the file-based import practice. The import file contains multiple sales orders provided from a distributor's order capture system. Examine the data in the file that you imported, and compare it to the running orders after import.

Prerequisites

Practice 3-1

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Examine the File-Based Import Template File
- Examine the File-Based Import Data File
- Compare the File-Based Import Data to Imported Orders

Tasks

Examine the File-Based Import Template File

1. Locate the file for this activity: filename **SourceSalesOrderImportTemplateOU.xlsm**. Oracle University students: you can find the file in the remote desktop's file directory at **D:\labs\order management**.

   All other students: Ask your instructor for a copy of this file.
2. Open the SourceSalesOrderImportTemplateOU.xlsm file.
3. Examine the list of interface tables presented in the Instructions and CSV Generation tab. Compare tables in the list to the tabs in the file.
4. Read the instructions on the first tab. Do they match the sequence in the import practice?
5. Click the second tab and scroll through the data columns. Note the required columns. Why is there no required column for buying party? Why isn't currency required? Why isn't there a required field for the item being ordered?
6. Do the same for the third tab for order lines. Are there more required fields here?
7. Examine the data columns on the remaining tabs. Are any data elements you would expect in an order missing?
8. If the order is prepriced, how do you send the price information? Through the Charges and Charges Components tabs.

Examine the File-Based Import Data File

9. Follow the course instructions to locate the file named SCMXXSalesOrders.zip and then open it.

10. Examine the list of interface table files present in the zip file. Compare this list to the tabs in the template file SourceSalesOrderImportTemplateOU.xlsm. Are any of the interface tables missing from the data file?
11. Open the DooOrderHeadersAllInt.csv file and compare the contents to the data on the second tab of the template file. Do you see any differences?
12. Do the same for the DooOrderLinesAllInt.csv file and the third tab of the template file.
13. Compare the contents of the remaining .csv files to that in the corresponding tab of the template file.

Compare the File-Based Import Data to Imported Orders

14. Log in to the application.
15. From the **Navigator**, select **Order Management**, and then click **Order Management**.
16. In the data file, find the source transaction number for an order.

*Source Transaction Identifier	*Source Transaction System	*Source Transaction Number	Source Transaction Revision Number
STUORDER01	LEG1	STUDENT14	
STUORDER02	LEG1	STUDENT24	
STUORDER03	LEG1	STUDENT34	

17. On the **Overview** page, enter the number into the **Search** field. Click the **Search** icon to start the search.

    If no order is found, then try another order from the data file. In the Examine the File-Based Import Log File practice you figure out why orders weren't imported.
18. Click the link for the order number to navigate to the **Order** page.
19. On the **Order** page, compare the order header data in the processing order to the corresponding data on the DOO_ORDER_HEADERS_ALL_INT import file. Has any data been added to the processing order?
20. Compare the order line data in the processing order to the corresponding data on the DOO_ORDER_LINES_ALL_INT import file. What data is different? Where does the pricing data originate?
21. Click the **Shipment Details** tab, and compare the shipping preferences data in the processing order to the corresponding data on the DOO_ORDER_LINES_ALL_INT import file. What data is different? Where does the pricing data originate? Don't forget to look at header and line tables.
22. Click the **Billing and Payment Details** tab, and compare the billing and payment data in the processing order to the corresponding data on the DOO_ORDER_LINES_ALL_INT import file. What data is different? Where does the pricing data originate? Don't forget to look at header and line tables. Are there any other import tables that contain billing data?

Practice Complete

You examined the data in the file that was used to import orders, and compared the data to the running orders after import.

Practice 3-3: Examining the File-Based Import Log File

Overview

In this practice, you view the log file that was created when you imported the orders.

Prerequisites

Practices 3-1 and 3-2

User Login

scmXX.student (XX is the student number assigned to you)

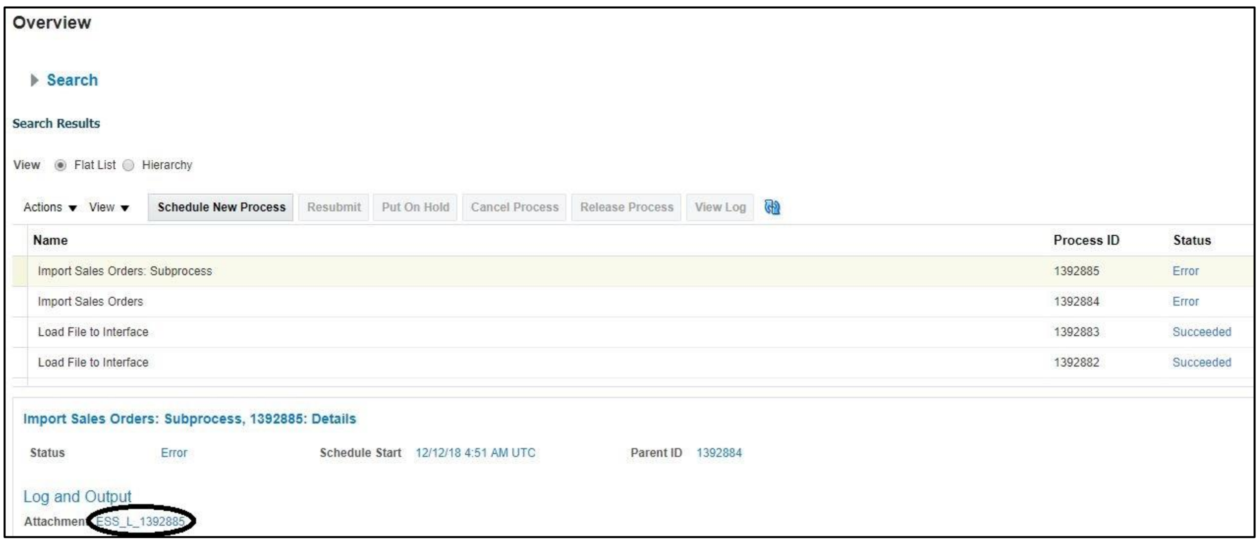
Summary of Tasks

- Navigate to the Scheduled Processes Page
- Examine the File-Based Import Log File

Tasks

Navigate to the Scheduled Processes Page

1. From the **Navigator**, select **Tools,** and then click **Scheduled Processes**.
2. On the **Overview** page, search for the **Import Sales Orders** process ID you wrote down during the File-Based Import practice.
3. Select the subprocess, and then click the link for the log file.



4. Save the log file to your desktop.

Examine the File-Based Import Log File

5. Open the log file that you saved to your desktop.
6. Examine the summary information at the beginning of the file. How many orders were imported? Did import of any order fail?

7. For orders that failed, what were the associated error messages?
8. For one of the failed orders, can you find the data in the import files that is in error, based on the information in the message? If not, what additional information would you need?
9. Repeat for any other failed orders in the import file.

Practice Complete

You have examined the file-based import log file.

Practices for Lesson 4: Transforming Orders

Practice 4-1: Creating a Product Transformation Rule

Overview

In this practice, you create a product transformation rule that changes the product from the sales order when the sales order is transformed to an orchestration order.

In this scenario, a sales order is sent from the order capture system with an item ID of 300000003357446. Vision Corporation is investigating a possible defect in this item, so for now it's fulfilling orders for item ID 300000003357446 with item ID 300000003357426 instead. You write a transformation rule that converts the first item ID to the second.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

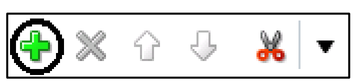
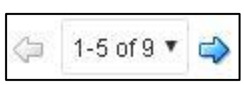
- Navigate to the Manage Product Transformation Rules Page
- Create a New Rule

Tasks

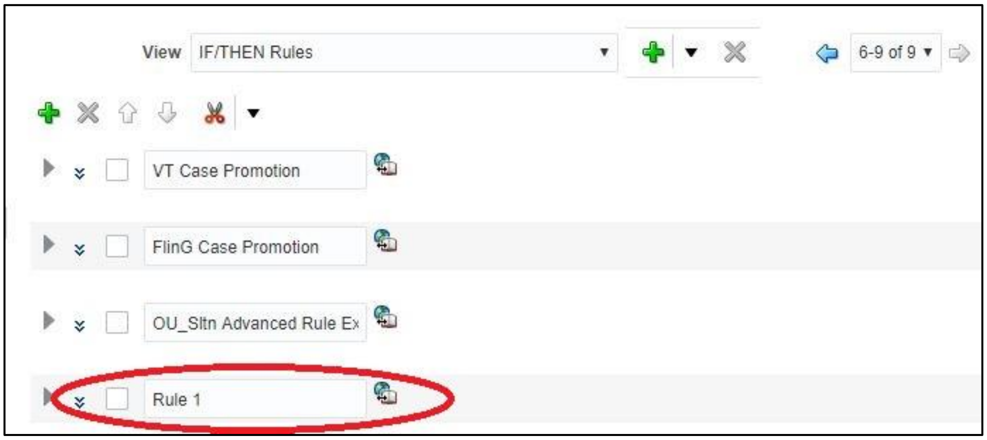
Navigate to the Manage Product Transformation Rules Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Product Transformation Rules** task. Select the task in the **Orders** functional area.

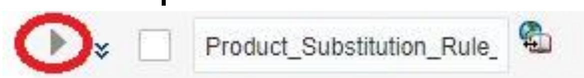
Create a New Rule

4. On the **Manage Product Transformation Rules** page, in the **View** field, ensure that **If/Then Rules** is selected.
5. Click the **Add Rule** icon.  If you don't see your new rule, then click the right arrow. 

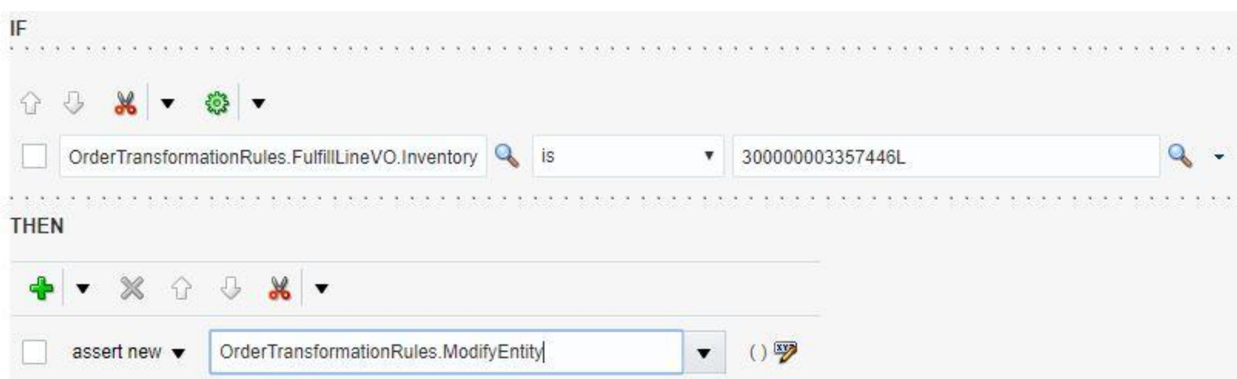
Here's what you should see:



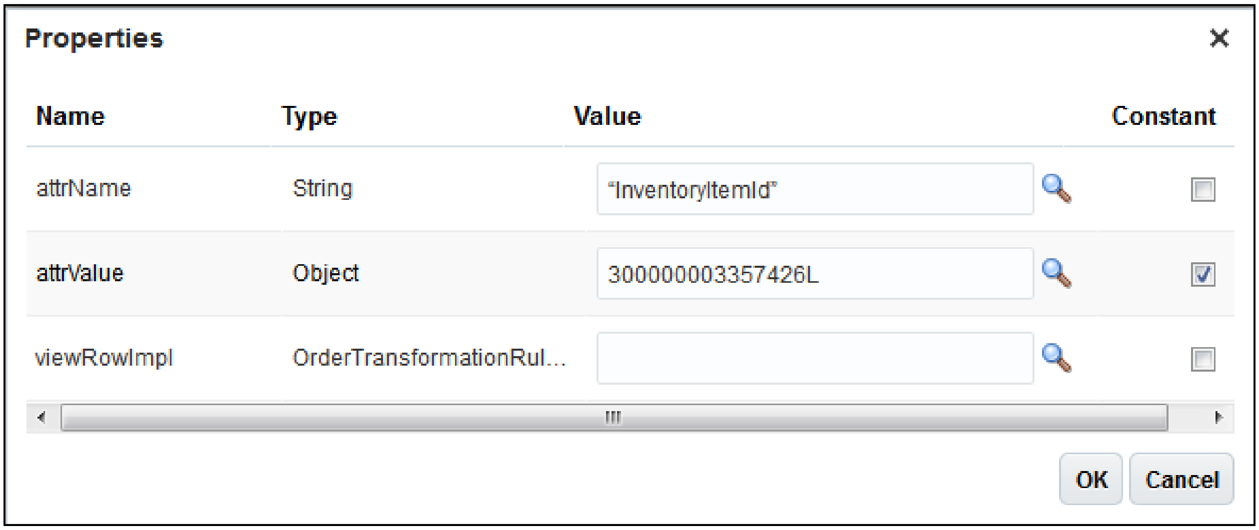
6. In the new rule that appears, overwrite Rule 1 and enter: `Product_Substitution_Rule_XX`
7. Click **Save**.
8. Click the **Expand** icon next to the name of the rule that you just added.



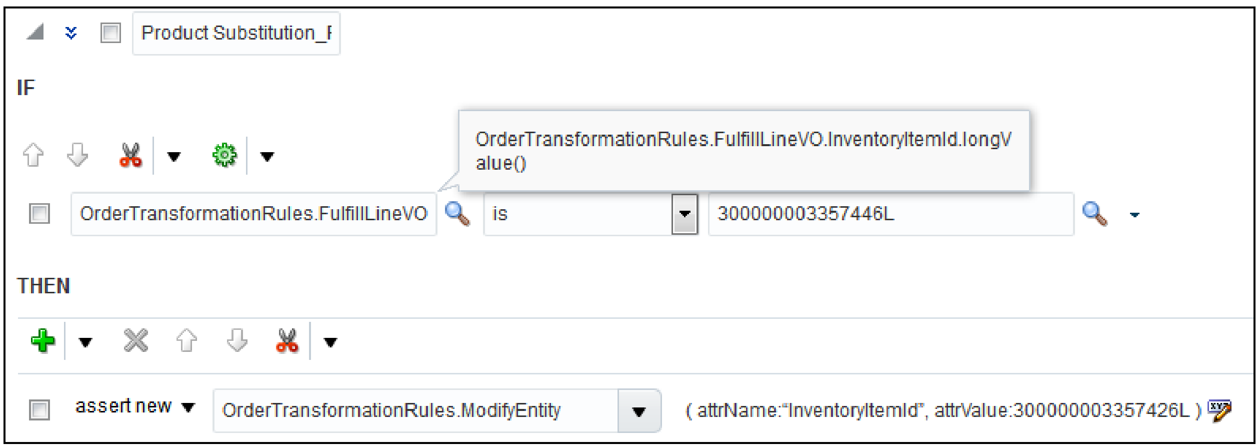
9. In the **IF** region, in the empty **Condition** field, enter: `InventoryItemID`
10. From the options that appear, select OrderTransformationRules.FulfillLineVO. InventoryItemId.longValue().
11. In the right **Value** field, enter: `300000003357446L`. The L denotes a long value. (Ignore the "no results found" message.)
12. In the **Then** region, click the arrow next to **Add Action** and select: assert new
13. To the right of assert new, click the **Select a Target** list.
14. Enter: `Modify`. Then select OrderTransformationRules.ModifyEntity. This is how things should look, so far:



15. Click the **Edit Properties** icon.
16. In the **Properties** dialog box, in the **Value** field of the attrName row, enter: `"InventoryItemId"`. You must include the quotation marks.
17. In the **Value** field of the attrValue row, enter: `300000003357426L`. Then select the **Constant** check box for the row.



18. Click **OK**. Your rule should look like this:



19. Click **Save and Close**. **Don't release this rule.**

Practice Complete

You've finished creating a product transformation rule that changes one product to another when the sales order is transformed.

Practice 4-2: Creating a Pretransformation Defaulting Rule Using the Visual Information Builder

Overview

In this practice, you create a pretransformation defaulting rule that automatically adds text to a specified field based on the item.

In this scenario, the sales order is sent from the order capture system with an item ID of CM50008. Vision Corporation has a policy of offering expedited shipping for this item. You write a pretransformation defaulting rule that defaults instruction text into the Shipping Instructions field of the fulfillment line.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage Pretransformation Defaulting Rules Page
- Create a New Rule

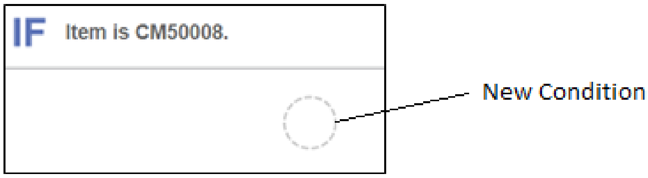
Tasks

Navigate to the Manage Pretransformation Defaulting Rules Page

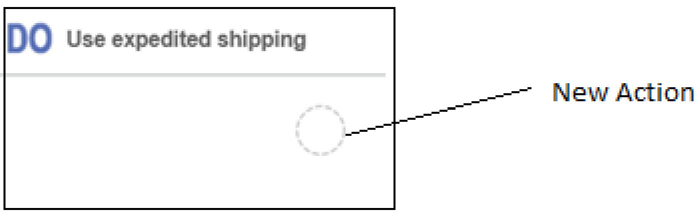
1. From the **Navigator**, select **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Pretransformation Rules for Sales Orders** task. Select the task in the **Orders** functional area.

Create a New Rule

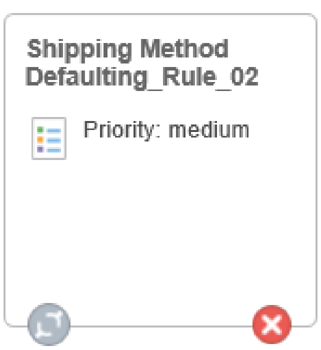
4. On the **Manage Pretransformation Defaulting Rules** page, click **Create New Rule**.
5. In the field at the top of the page, click **New Rule**. In the **Enter Rule Name** dialog box, replace New Rule with: `Shipping Instructions Defaulting Rule XX` and then click **OK**. Add a rule description, if you want.
6. Click the Enter Description text next to IF, and then enter: `Item is CM50008`. **Note:** If you can't enter information on this page, then clear the browser cache and try again.
7. Click **OK**.
8. Click the **New Condition** icon below the description you just entered. This screenshot shows the round **New Condition** icon below the If statement.



9. In the **Create Condition** dialog box, begin entering: `Item`. Select Item (PreTransformationRules.Order Fulfill Line) from the options that appear.
10. Select =
11. Click the **Search** icon. In the **Item** field of the **Search** dialog box, enter: `CM50008`. Click **Search**. When the value appears, select it and then click **OK**.
12. In the **Create Condition** dialog box, click **OK**.
13. On the **Manage Pretransformation Defaulting Rules** page, click the **Then** icon and then select DO.
14. In the **Enter Description** dialog box, enter: `Use expedited shipping.` Then click **OK**.
15. Click the **New Action** icon, and then select **Set a Value**. This screenshot shows the round **New Action** icon below the **Do** statement.



16. In the **Create Action** dialog box, begin entering: `Ship`. Select Shipping Instructions (PreTransformationRules.Order Fulfill Line) from the list of options that appear.
17. Make sure the next field reads: "is set to"
18. In the field below "is set to," enter: `Expedited Shipping.` You don't need to include quotation marks this time. Click **OK**.
19. On the **Manage Pretransformation Defaulting Rules** page, click **Save and Close**.
20. View the rule on the **Manage Pretransformation Defaulting Rules** page. Verify that your rule doesn't have any errors. An X means that it has errors. This screenshot shows a rule with an X, which means that the rule has an error.



21. Click **Close**.

Practice Complete

You've created a pretransformation defaulting rule that inserts specific text into the Shipping Instructions field.

Demos for Lesson 5:
Creating Orders

Demo 5-1: Ordering a Standard Item with Coverage

Overview

This demo shows how to navigate in Oracle Cloud applications, access the Order Management work area, create a new order with standard items and coverage, ship the order, and bill the customer.

Background

Logan Anderson, from Computer Service and Rentals, calls Vision Corporation to place an order for 12 Vision In Tab Mini Slimline 4000 Tablet (AS6647331). He also wants to purchase a 2-year extended warranty for the tablets. He wants the order sent using 2-Day Air service and expects the item to be billed as Net 30 per the corporate agreement. After the order is placed, he expects it to be shipped and billed per his instructions. Additionally, two salespeople who are responsible for the Computer Service and Rentals account need to share the revenue evenly.

Because the item is manufactured in-house, the shipment request is sent to Oracle Fusion Inventory Management for shipment processing.

After the order is shipped, the billing details are sent to Oracle Fusion Receivables.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Order Management Overview Page
- Create a New Order with Standard Item and Coverage

Tasks

Navigate to the Order Management Overview Page

1. On the landing page, discuss the **Home** and **Notifications** icons. Discuss the function of each, so students understand high-level cloud applications navigation.

2. Open the **Navigator** menu next to Vision.

3. Select the **Order Management** menu, and then click **Order Management**.

4. On the **Overview** page, click the **View By**  icon below the **Create Order** button. You can select a source system, but leave it as All.
5. Examine and discuss the infolets.
6. Click the **Expanded View** icon at the lower right corner of one of the infolets.

7. Click one of the infolets to drill to more information.
8. On the **Manage Orders** page, examine the information, and then click **Done**.

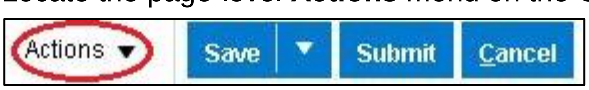
Create a New Order with Standard Item and Coverage

Order Header

9. Click **Create Order** on the **Overview** page of the **Order Management** work area.
10. On the **Create Order** page, in the **Business Unit** field, select **US1 Business Unit**, if it's not selected already.
11. In the **Customer** field, enter: `Computer Service and Rentals`.
12. In the **Contact** field, select **Logan Anderson**, if it's not selected already.
13. In the **Contact Method** field, select **logan.anderson_zcpp@oracledemos.com**, if it's not selected already.
14. Click the **Sales Credits** icon.
15. In the **Manage Sales Credits** dialog box, enter:

Salesperson	Revenue Percentage
Lisa Jones	50
Ralph Ambers	50

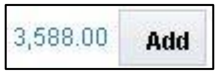
16. Click **OK.**
17. Locate the page-level **Actions** menu on the **Create Order** page.



18. Select **View Pricing Strategy and Segment**. Discuss how pricing strategy is derived for a customer, and indicate that the details are covered in the Pricing lessons. Click **Done**.

Items, Price, Availability, and Project Details

19. On the **Create Order** page, in the **Select Item** field, enter: `AS6647331`. Then tab out of the field.

20. In the **Quantity** field, override the current value by entering: `12`.
21. Click the Sale Price. 

22. In the **Sale Price** dialog box, discuss the discount for the item based on quantity. Then click **Done**.
23. Note the **Sales Agreement** field. This is where you would select a sales agreement if you have one with this customer. The price would adjust to the negotiated price.

24. Discuss the availability information indicated by **In Stock**.
25. Click **Add** to add the item to the order.
26. Click the **Edit Project Details** icon. Enter:

Field	Value
Project Number	PI20040
Task Number	5.0
Expenditure Organization	Consulting US

27. Click **OK** to close the **Edit Project Details** window.
28. In the **Select Item** field, enter: `EW0002-R`. Then tab out of the field.
29. The duration and duration period appear as **2 Year**. Click **Select Covered Item**.
30. In the **Select Covered Item** dialog box, select AS6647331 in Order Line.
31. Select a contract start date in the future. Use order date + 3.
32. Click **Add** to add the item to the order. Note that the line number of the warranty is 1.1, and text below the item name indicates that it covers AS6647331on line 1.
33. In the **Select Item** field on the **Create Order** page, enter: `SUB23345`. Then click **Add** to add this subscription item to the order.
34. Click the **Edit** icon next to **Your Price** for AS6647331. If the charge is enabled for manual adjustments, then the icon appears next to the charge.
35. In the **Edit Sale Price** dialog box, select:

Field	Value
Type	Discount percent
Amount	10
Reason	Sales negotiation.

This is called a manual price adjustment. The amount and other details of this adjustment are validated against the organization's guidelines. We discuss guidelines in another lesson.

36. Click **Save and Close**.

Shipping Details

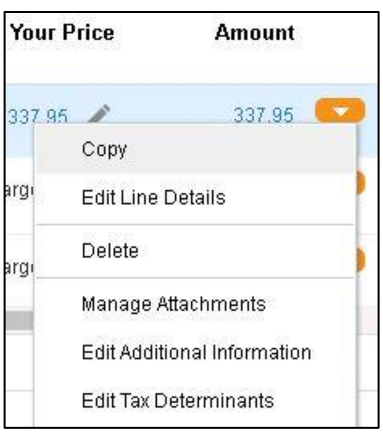
37. On the **Create Order** page, click the **Shipment Details**  tab.
38. In the **Requested Date** field on the **General** tab, enter a future date different from the defaulted date, such as order date + 5.
39. In the **Shipping Method** field, enter: `Fedex`. Then, select **FedEx Air FedEx 2day**.
40. In the **Supply** tab, in the **Warehouse** field, select **003 – Chicago**.
41. Click **Estimate Order Availability**. Verify the first item is available as of the requested date. Note the **Availability Status** on the order lines.
42. Click **Save**. An order number is created and displayed. This number is assigned randomly. However, you can configure this number so it follows the sequence your organization wants. Note the sales order number that appears here for use in future steps: _________.

Billing Details

43. Click the **Billing and Payment Details**  tab.
44. In the **Bill-to Contact Method** field, select Evelyn Duncan.
45. In the **Payment Term** field, select **30 Net**.
46. Click **Save**.

Tax Determinants

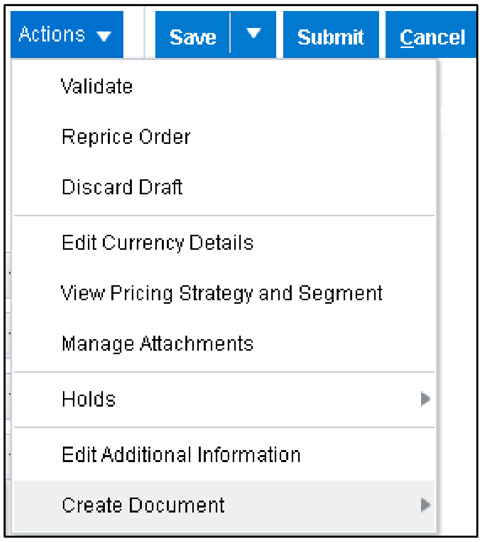
47. Click the **Lines**  tab.
48. In the line-level **Actions** menu, select **Edit Tax Determinants** for AS6647331.



49. In the **Edit Tax Determinants** dialog box, discuss the tax determinants and how the required values are defaulted when the line is saved.
50. Click **OK** to close the dialog box.

Create Order Report

51. On the **Create Order** page, in the page-level **Actions** menu, select **Create Document** and then **View**.



52. If a warning appears informing you that your changes will be saved, then click **Yes**. The application performs a validation.
53. Show the order document, and then click **Done** at the bottom of the page.

Order Total and Submit

54. Click the **Total** value link: 

. Then discuss the **Total** dialog box.
55. Click **Done** to close the dialog box.
56. On the **Create Order** page, click the page-level **Actions** menu, and then select **Validate**. Point out that you can validate the order manually this way.
57. In the **Confirmation** message that appears, click **OK**.
58. Click **Submit**. When you enter a warehouse against a line that is project-tagged, validation occurs during Submit to ensure that the correct combination of project attributes, such as project number, task number, expenditure organization, expenditure item date.
59. You may get a warning saying that the project doesn't have an active contract assigned. Because this is just a warning, you can proceed with submitting the order. Review the warning, and then click **Submit Order**.
60. In the **Confirmation** message, click **OK**. The **Order** page refreshes. The status is Processing.
61. Click **Done**.

Fulfillment View

62. On the **Overview** page, enter the order number, and then click **Search**.
63. On the **Order** page, in the page-level **Actions** menu, select **Switch to Fulfillment View**.
64. Select the **Fulfillment Lines** tab.

65. Click the **Orchestration Process Number** link for item AS6647331.
66. View the Gantt chart.

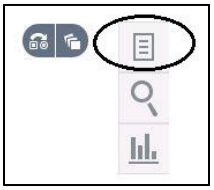
- Briefly mention the seeded orchestration process that is acting on AS6647331.

- Mention that additional details about the process, and how to create or modify one, are covered in another lesson of the course.

67. Click **Done**.
68. On the **Order** page, click **Done**.

Shipments and Shipping

69. From the **Navigator**, select **Supply Chain Execution**, and then click **Inventory Management**.
70. In the **Inventory Management** work area, click the **Tasks** panel tab.



71. Select **Shipments** in the **Show Tasks** list, and then select **Manage Shipment Lines**.
72. In the **Advanced Search** area, enter the number of the order you just created in the **Order** field next to Equals. In the **Scheduled Ship Date** list, select a value that corresponds to the value that you entered in the **Requested Date** field in the Shipping Details steps. Then, click **Search**.
73. On the **Edit Shipment Line** page, click **Autocreate Shipment**.
74. In the **Confirmation** message, click **OK**.
75. In the **Actions** menu, select **Pick Release**.
76. In the **Confirmation** message, click **OK**.
77. Click the shipment number in the **Summary: Shipment** area.
78. On the **Edit Shipment** page, in the **Actions** menu at the top of the page, select **Change Ship Confirm Options**.
79. In the Ship Confirm rule, select the options as follows:

Option	Selection
Auto Ship	Selected
Ship with	Ship Quantities
Options if Shipped Quantities Are Not Manually entered	Ship Requested Quantities
Close Shipment	Selected

80. Click **Save and Close.**
81. On the **Edit Shipment** page, click **Ship Confirm**.
82. In the **Confirmation** message, click **OK**.

Billing/Invoice

83. From the **Navigator**, select **Order Management**, and then click **Order Management**.
84. On the **Overview** page, search for the order, go to fulfillment view, and view the line status.
85. Click the orchestration process number to view the completed tasks in the Gantt chart.
86. Sign out from the user you have been using and sign in again as **Tracey.Allen**.
87. To run the Import AutoInvoice scheduled process, begin with the **Navigator**, select **Tools**, and then click **Scheduled Processes**.
88. On the **Scheduled Processes** page, click **Schedule New Process**.
89. In the **Schedule New Process** dialog box, in the **Name** list select Search (at the bottom).
90. In the **Search and Select: Name** field, enter: `Import AutoInvoice`.
91. Click the **Search** button, select Import AutoInvoice, and then click **OK**.
92. In the **Schedule New Process** dialog box, click **OK.**
93. In the **Process Details** dialog box, enter:

Field	Value
Business Unit	US1 Business Unit
Transaction Source	Distributed Order Orchestration
From Sales Order Number	<Number of the order>

94. Click **Submit** at the top of the dialog box.
95. Note the process ID in the **Confirmation** message, and then click **OK**.
96. Click the **Refresh** icon to monitor the status of the process.
97. Verify that the process completed successfully.
98. From the **Navigator**, select **Receivables**, and then click **Billing**.
99. On the **Billing** page, click the **Tasks** panel tab on the right side of the page, and then select **Manage Transactions**.
100. On the **Manage Transactions** page, **Bill-to Customer** field, select **Computer Service and Rentals**.
101. In the **Reference** field, enter the order number.
102. Click **Search**.
103. Click the **Transaction Number** link for the first line.
104. On the **Review Transaction: Invoice** page, view the invoice details.
105. Click **View Image** at the top right to see an image of the actual invoice.
106. Search for the sales order on the invoice. Then click **OK**.
107. Click **Save** and then select **Save and Close**.
108. In the Information message, click **OK**.
109. On the **Manage Transactions** page, click **Done**.
110. Sign out from the Tracey.Allen login.

Demo Complete

You've navigated in Oracle cloud applications to the Order Management work area, and created a new order with a standard item.

Demo 5-2: Ordering a Model with a Coverage Item

Overview

This demo shows how to order a configurable product, a tablet, and add a coverage to the product.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Order Management Overview Page
- Create a New Order with a Configurable Product
- Configurable Product, Price and Availability

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.

Create a New Order with a Configurable Product

2. On the **Overview** page, click **Create Order**.
3. On the **Create Order** page, in the **Business Unit** field, select US1 Business Unit.
4. In the **Customer** field, enter: `Computer Service and Rentals`.
5. In the **Bill-to Customer** field, select Computer Service and Rentals, if it isn't selected already.
6. In the **Contact** field, select **Logan Anderson**, if it isn't selected already.
7. In the **Contact Method** list, select Logan Anderson's email.
8. Locate the page-level **Actions** menu.

9. Select **View Pricing Strategy and Segment**. View the information, and then click **Done**.

Configure Product, Price and Availability

10. In the **Select Item** field, select **AT6751000**. Then, press the Tab key until you see the **Configure and Add** button.
11. Click the **Sale Price** link. This is the hyperlinked number next to **Configure and Add**.
12. In the **Amount: Sale Price** dialog box, view the discount for the item based on quantity, if any.

13. Click **Done** to close the dialog box. Note that the availability information isn't displayed for the configured product because the options aren't selected.
14. Discuss the **Configure and Add** button. You have two options to configure the product:
    - Click the **Configure and Add** button, which opens **Configurator**, or
    - Click **Add,** which adds the configurable product to the order. Then, on the **Order** line, click the **Configure** icon to open **Configurator**.
15. Click **Configure and Add**.
16. Discuss the displayed prices**,** to highlight the real-time integration between Oracle Fusion Pricing and Configurator.
17. Select the following:

Option	Response
Plan to use Skype or Video Conferencing?	Yes
Plan to watch a lot of videos?	Yes
Plan to store your video library on the tablet?	Yes
Connectivity preference?	Wi-Fi
Tablet Color	Silver
Add monogram	Click pencil and add initials

18. Click **Next** and review the Summary pane to see the selections made through guided selling.
19. Select the following:
    - Memory – 2 GB DDR2
    - Battery – 3.8V/2600mAh
20. Click **Finish and Review**. The **Review** page displays your selections, the prices, and the total price of the configuration.
21. Click **Back**.
22. Modify your battery option by changing it from 3.8V/2600mAh to 3.8V/3200mAh.
23. Click **Finish and Review**.
24. On the **Review** page, click **OK** to return to the **Create Order** page. The complete configuration appears on the order at this point.
25. On the **Create Order** page, in the **Select Item** field, enter: `EW0002-F`. Then tab out of the field.
26. Click **Select Covered Item.**
27. Click the arrow next to the **Order Line** field and select **AT6751000** as the covered product line.
28. Select a contract start date in the future.
29. Click **Add** to add the item to the order. Note that the line number of the warranty is 1.1, and text below the item name indicates that it covers AT6751000 on line 1.

30. Click **More** on the order line of the warranty. The components of the configuration and their prices appear on the **Components** page. Also, note that a warranty line appears for each coverable option in the configuration. Note that the **Configure** icon is available to enable editing of the configuration.
31. On the **Components** page, click **Done** to return to the **Create Order** page.
32. Point out that the order information or configuration details are in memory. They aren't saved to the database yet.
33. On the **Create Order** page, click **Save**.
34. In the page-level **Actions** menu, select **Validate**. This action validates the configuration and the order.
35. In the **Confirmation** message, click **Yes**. You can see that the order was validated.
36. Add a new line with the same item. To do so, search for AT6751000.
37. Click the arrow next to the **Configure and Add** button, and then select **Add**. The item is added to the order. At this point, the item isn't configured.
38. In the **Actions** menu at the top of the page, select **Validate**.
39. In the **Warning** message appears, indicating that the configuration for line 2 isn't valid because the item isn't configured yet. Click **OK**.
40. In the line-level **Actions** menu for line 2, select **Delete**.
41. In the **Warning** message, click **Yes**.
42. Click **Submit**.
43. In the **Confirmation** message, click **OK**.

Demo Complete

You have ordered a configurable item, a tablet, and added a warranty for it.

Demo 5-3: Creating and Processing a Return Order

Overview

This demo shows how to create and process a return order for an item with coverage.

Prerequisites

Demo 5-1

User Login

scm00.instructor

Summary of Tasks

- Navigate to the Order Management Overview Page
- Create Return Order
- Fulfillment View
- Billing/Credit Memo

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select the **Order Management** menu, and then click **Order Management**.

Create Return Order

2. On the **Manage Orders** page, in the **Order** field, enter the number of the order from demonstration 5-1 or the new order you just created (see Prerequisites). The status of the fulfillment lines must be closed, regardless of the status of the order.
3. Click **Search**.
4. Click the **Order** link.
5. Select the covered product line, the line with AS46336, to return.
6. Click the **Return** button. Note that both the tablet and warranty lines appear in the **Return Items** dialog box.
7. In the **Return Quantity** field of the covered product, enter: `1`. Note that the return quantity of the coverage line (warranty) changes to match that of the covered product.
8. In the **Return Type** field, select **Return for Credit**.
9. In the **Return Reason** field, enter: `Reason code not provided`.
10. Click **Create Order**.
11. In the **Order Lines** region, note the icon indicating a return line , and note the pricing information. Also, note the reference to the original order.
12. In the amount column of the first order line, click the link.
13. Click **Done** to close the dialog box.
14. Click the **Action** icon on the first order line, and select **Edit Line Details**.

15. In the **Line Details** dialog box, view return information that was entered, as well as a reference to the original order, source order, that is being returned. Click **OK**.
16. Click **Submit** to submit the return order.
17. Note the order number in the confirmation message, and then click **OK**.
18. Click **Done**.
19. Click **Done**.

Fulfillment View

20. On the **Overview** page, search for your return order.
21. On the **Order: Computer Service and Rentals** page, in the **Actions** menu, select **Switch to Fulfillment View**.
22. Select the **Returns** tab.
23. Click the orchestration process number of the returned item.
24. View the Gantt chart. The status at this point should show Awaiting Billing.

Billing/Credit Memo

25. Sign out from the user you have been using, and sign in again as **Tracey.Allen**.
26. From the **Navigator**, select **Tools**, and then click **Scheduled Processes**.
27. On the **Overview** page, click **Schedule New Process**.
28. Select Search (at the bottom) in the **Name** list.
29. In the **Search and Select: Name** dialog box, enter Import AutoInvoice and then click **Search**.
30. Select Import AutoInvoice, and then click **OK**.
31. In the **Schedule New Process** dialog box, click **OK.**
32. In the **Process Details** dialog box, enter the following:

Field	Value
Business Unit	US1 Business Unit
Transaction Source	Distributed Order Orchestration
Transaction Type	Credit Memo (Regular Credit Memo)
From Sales Order Number	<Number of the return order>

33. Click **Submit** at the top of the dialog box.
34. In the confirmation message, note the process ID, and click **OK**.
35. Click the **Refresh** icon to monitor the status of the process.
36. Verify that the process completed successfully.
37. From the **Navigator**, select **Receivables**, and then click **Billing**.
38. On the **Billing** page, click the **Tasks** panel tab on the right side of the page, and then select **Manage Transactions**.

39. On the **Manage Transactions** page, enter the following:

Field	Value
Bill-to Customer	Computer Service and Rentals
Reference	<Number of the return order>

40. Click **Search**.
41. Click the **Transaction Number** link.
42. View the credit memo details.
43. Click the **View Image** button at the top of the page to see an image of the actual invoice.
44. Click **OK**.
45. Sign out from the Tracey.Allen login.

Demo Complete

You have created and processed a return order.

Practices for Lesson 5: Creating Orders

Practice 5-1: Ordering a Standard Item with Coverage

Overview

In this practice, you'll create and submit a sales order for a standard item with a warranty.

Background

Logan Anderson, from Computer Service and Rentals, calls Vision Corporation to place an order for 12 Vision In Tab Mini Slimline 4000 Tablet (AS6647331). He also wants to purchase a 2-year extended warranty for the tablets. He wants the order sent using 2-Day Air service and expects you to bill the item as Net 30 per the corporate agreement. After Logan places the order, he expects you to ship it and bill it per his instructions. Also, two salespeople who are responsible for the Computer Service and Rentals account need to share the revenue evenly.

Because the item is manufactured in-house, the shipment request is sent to Oracle Fusion Inventory Management for shipment processing.

After the order is shipped, the billing details are sent to Oracle Fusion Receivables.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Order Management Overview Page
- Create a New Order with a Standard Product and Coverage

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.

Create a New Order with a Standard Product and Coverage

Order Header

2. Click **Create Order** on the **Overview** page of the **Order Management** work area.
3. On the **Create Order** page, in the **Business Unit** field, select US1 Business Unit.
4. In the **Customer** field, enter: `Computer Service and Rentals`
5. In the **Contact** field, select Logan Anderson.
6. In the **Contact Method** field, select logan.anderson_zipf@oracledemos.com.
7. Click the **Sales Credits** icon.
8. In the **Manage Sales Credits** dialog box, enter:

Salesperson	Revenue Percentage
Lisa Jones	50
Ralph Ambers	50

9. Click **OK**.
10. Locate the page-level **Actions** menu on the **Create Order** page.

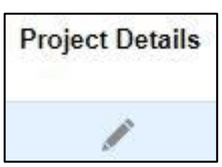
11. Select **View Pricing Strategy and Segment**. View the information in this window. Click **Done**.

Items, Price, Availability, and Project Details

12. On the **Create Order** page, in the **Select Item** field, enter: `AS6647331`. Then tab out of the field.
13. In the **Quantity** field, override the current value by entering: `12`
14. Click the Sale Price. 

15. In the **Sale Price** dialog box, note the discount for the item based on quantity. Then click **Done**.
16. Take a look at the **Sales Agreement** field. This is where you would select a sales agreement if you have one with this customer. The price would adjust to the negotiated price.

17. Notice that the item is **In Stock**.
18. Click **Add** to include the item in the order.
19. Click the **Edit Project Details** icon.



.

20. Enter:

Field	Value
Project Number	PCS10033
Task Number	1
Expenditure Organization	Consulting US

21. Click **OK** to close the **Edit Project Details** window.
22. In the **Select Item** field, enter: `EW0002-R`. Then tab out of the field.
23. The duration and duration period appear as **2 Year**. Click **Select Covered Item**.
24. In the **Select Covered Item** dialog box, select AS6647331 in **Order Line**.
25. Select a contract start date in the future. Use order date + 3.
26. Click **Add** to include the item in the order. Notice that the line number of the warranty is 1.1, and text below the item name shows that it covers AS6647331 on line 1.
27. In the **Select Item** field on the **Create Order** page, enter: `SUB23345`. Tab out of the field, and then click **Add** to include this subscription item in the order.
28. Click the **Edit** icon next to **Your Price** for AS6647331. If the charge is enabled for manual adjustments, then the icon appears next to the charge.
29. In the **Edit Sale Price** dialog box, select:

Field	Value
Type	Discount percent
Amount	10
Reason	Sales negotiation

This is called a manual price adjustment. The amount and other details of this adjustment are validated against the organization’s guidelines. We discuss guidelines in another lesson.

30. Click **Save and Close**.

Shipping Details

31. On the **Create Order** page, click the **Shipment Details** tab.
32. In the **Requested Date** field on the **General** tab, enter a future date different from the defaulted date, such as order date + 5.
33. In the **Shipping Method** field, enter: `FedEx`. Then, select FedEx Air FedEx 2day.
34. In the **Supply** tab, in the **Warehouse** field, select 003 – Chicago.
35. Click **Estimate Order Availability**. Verify the first item is available as of the requested date. Note the Availability Status on the order lines.
36. Click **Save**. An order number is created and displayed. This number is assigned randomly. However, you can configure this number so it follows the sequence your organization

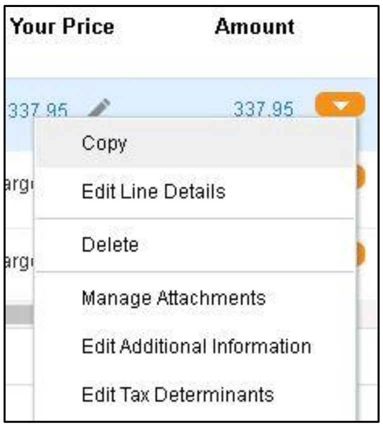
wants. Notice the sales order number that appears here: _________. You'll need it for future steps.

Billing Details

37. Click the **Billing and Payment Details**  tab.
38. In the **Bill-to Contact Method** field, select Evelyn Duncan.
39. In the **Payment Term** field, select 30 Net.
40. Click **Save**.

Tax Determinants

41. Click the **Lines** tab.
42. In the line-level **Actions** menu, select **Edit Tax Determinants** for AS6647331.



43. In the **Edit Tax Determinants** dialog box, notice the tax determinants and the required values, which are defaulted when the line is saved.
44. Click **OK** to close the dialog box.

Order Total and Submit

45. Click the **Total** value link.

.

46. View the contents of the **Total** dialog box, and then click **Done** to close it.
47. On the **Create Order** page, click the page-level **Actions** menu, and then select **Validate** to validate the order manually.
48. In the **Confirmation** message that appears, click **OK**.
49. Click **Submit**. When you enter a warehouse against a line that's project-tagged, validation occurs during submission to ensure that the correct combination of project attributes, such as project number, task number, expenditure organization, and expenditure item date.
50. You may get a warning. Because this is just a warning, you can proceed with submitting the order. Review the warning, and then click **Submit Order**.
51. In the **Confirmation** message, click **OK**. The **Order** page refreshes. The status is Processing.
52. Click **Done**.

Practice Complete

You’ve created and submitted a sales order for a standard product and warranty.

Practice 5-2: Ordering a Model

Overview

In this practice, create and submit a sales order for a model, and view the components.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Order Management Overview Page
- Create a New Order with a Model
- Configure Product, Price and Availability

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.

Create a New Order with a Model

2. On the **Overview** page, click **Create Order**.
3. On the **Create Order** page, in the **Business Unit** field, select US1 Business Unit.
4. In the **Customer** field, enter: `Computer Service and Rentals`
5. In the **Bill-to Customer** field, select **Computer Service and Rentals**, if it isn't selected already.
6. In the **Contact** field, select **Logan Anderson**.
7. In the **Contact Method** field, select Logan Anderson's email.
8. In the **Bill-to Account** field, select **10060**, if it isn't selected already.
9. Locate the page-level **Actions** menu.

10. Select **View Pricing Strategy and Segment**.
11. In the **View Pricing Strategy and Segment** dialog box, view the strategy information and then click **Done**.
12. Click **Save**. Write down the sales order number.

Configure Product, Price, Availability, and Project

13. In the **Select Item** field, enter: `AT6751000`. Press the Tab key. Information about the item appears next to the item number, and the **Configure and Add** button becomes available.
14. Click the hyperlinked price next to **Configure and Add**.
15. In the **Amount: Sale Price** dialog box, view the price components. Then click **Done** to close the dialog box.
16. Notice that the availability information is missing for the configured product because you didn't select the options yet.
17. Notice the **Configure and Add** button. You have these options to configure the product:
    - You can click the **Configure and Add** button, which opens pages where you'll configure the product and then add it to the order, or
    - You can click the arrow next to the **Configure and Add** button, and then select **Add**. This action adds the configurable product to the order. Then, on the **Order** line, click the **Configure** icon.
18. Click **Configure and Add**.
19. Select these options for your tablet:

Option	Response
Plan to use Skype or Video Conferencing?	No (Selected by default)
Plan to watch a lot of videos?	No (Selected by default)
Connectivity Preference?	Blank
Tablet Color	Silver Rear Case Assembly

20. Click **Next**.
21. On the **Configure** page, select:
    - 8" Display
    - 16 GB storage
22. Select one option in each of the remaining option classes. Then, click **Finish and Review**.
23. On the **Review** page, notice that your selections, the prices, and the total price for the configuration appear.
24. Click **Back**.
25. Change your Memory option from 16 GB to 32 GB.
26. Click **Finish and Review**.
27. On the **Review** page, click **OK** to return to the **Create Order** page. The complete configuration is sent back to the order at this point.
28. Click **Submit**.
29. A confirmation message appears, indicating that the order was submitted. Make sure you write down the sales order number. Then click **OK**.

Practice Complete

You’ve created and submitted a sales order for a configurable product, and viewed the components of a configured product from the sales order.

Practice 5-3: Viewing Fulfillment Lines and Orchestration Plan

Overview

In this practice, you'll search for an existing order, navigate to the fulfillment view, and check the orchestration plan for the lines on an order.

Prerequisites

Practice 5-1

User Login

scmXX.student (XX is the student number assigned to you)

Tasks

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.
2. On the **Overview** page, in the **Search** field, enter the order number for the order you created during practice 5-1.
3. Click the **Search** icon.
4. On the **Order** page, view the order information. Because the order was submitted, the order status should be in Processing status.
5. Click the **Actions** menu, and select **Switch to Fulfillment View**.
6. On the **Order** page, the default view displays the **Order Lines** tab. The order lines that you created in practice 5-1 appear.
7. Click the **Fulfillment Lines** tab. View the fulfillment status for each line by selecting the line and viewing the status in the table or in the **General** tab.
8. Scroll to the right in the **Fulfillment Lines** region. Click the **Orchestration Process Number** link for each fulfillment line.
9. On the **Orchestration Process** page, you can see the orchestration plan. It displays a list of tasks in the plan and the current statuses of these tasks.
10. Click **Done** to close the **Orchestration Process** page.
11. Click **Done** to close the **Order** page.

Practice Complete

You've searched for an existing order, navigated to the fulfillment view, and checked the orchestration plan for the lines on an order.

Practice 5-4: Process Sales Orders for Projects

Overview

Set up Order Management to create and fulfill sales orders that include project attributes, such as Project Number, Task Number, and Expenditure Organization.

If this functionality is enabled, here's what end users can do:

- Create a sales order that references a specific project and task in the project
- Pick and ship items from the same inventory for all projects
- Ship items from the same warehouse, but invoice them differently according to project
- Interface the cost of items shipped from common inventory to a single project
- Invoice your customer according to a business rule that references the project

This practice teaches you how to enable this functionality.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Create a New Lookup Code
- Modify Orchestration Process
- Create Orchestration Process Assignment Rule

Tasks

Create a New Lookup Code

Sales order lines that include project details typically are invoiced as part of Project Contract Billing, and not from Receivables. To ensure that lines are billed by Project Contract Billing, you must create a new lookup code, such as "Projects," and assign it to the lines that include project details. To do so, create a lookup code using the Manage Order Lookups task, as follows:

1. From the **Navigator**, select **Others,** and then click **Setup and Maintenance**.
2. Select the **Order Management** offering.
3. Search for, and then select the **Manage Order Lookups** task.
4. On the **Manage Order Lookups** page, search for: ORA_DOO_LINE_TYPES
5. In the **ORA_DOO_LINE_TYPES: Lookup Codes** area, create a new lookup code with these attributes:

Attributes	Value
Lookup Code	PRJ
Display Sequence	2
Enabled	Selected
Start Date	Current date minus 1
Meaning	Projects
Description	Contains Project Details

6. Click **Save and Close**.

Modify Orchestration Process

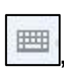
For this practice, you're going to modify the seeded orchestration process ManualShipOrderGenericProcess. You'll learn more about orchestration processes later in the course.

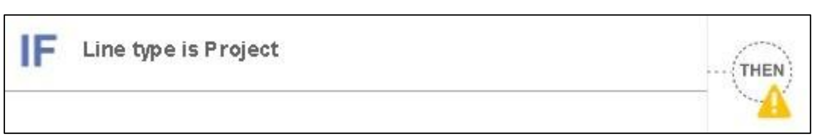
7. From the **Navigator**, select **Others** and then click **Setup and Maintenance.**
8. On the **Setup** page, select the **Order Management** offering.
9. Search for, and then select the **Manage Orchestration Process Definitions** task.
10. On the **Manage Orchestration Process Definitions** page, search for the ManualShipOrderGenericProcess process name.
11. In the **Search Results** area, click **Actions** and then **Duplicate**.
12. In the **Process Name** field, modify the name so it reads: CustomDOO_ManualShipOrderGenericProcessXX<first letter of your last name>
13. In the **Process Display Name** field, enter: `Manual Ship Order Generic XX<first letter of your last name>`
14. Click **Save**.
15. In the **Process Details** area, delete the "Create Invoice" and "Wait for Invoice" steps.
16. Click the **Status Conditions** tab. In the **Orchestration Status Values** tab, delete these status values:
    - AWAITING BILLING
    - BILLED
17. In the Fulfillment Line status, in Edit Status Rule set, delete:
    - "Invoice"="AWAIT_BILLING"
    - "Invoice"="BILLED"
18. Click **Save and Close** at the top of the page.
19. On the **Edit Orchestration Process Definition** page, click **Actions** and then **Validate** at the top of the page.
20. Click **Actions**, and then **Release**.
21. In the **Download Generated Process** dialog box, click the **X** to close it.

22. In the **Information** message, click **OK**.
23. Click **Actions** at the top of the page, and then click **Deploy Process**.
24. In the **Deploy Process** dialog box, in the **Password** field, enter your login password, and then click **Deploy**.
25. In the **Confirmation Message** dialog box, click **OK**.
26. On the **Edit Orchestration Process Definition** page, click **Save and Close**.

Create Orchestration Process Assignment Rule

27. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
28. On the **Setup** page, select the **Order Management** offering.
29. Search for the Manage Process Assignment Rules for Sales Orders task. Select the task in the **Orders** functional area.
30. On the **Manage Orchestration Process Assignment Rules** page, click **Create New Rule**.
31. In the dialog box, replace "New Rule" with: `Assign CustomDOO_ManualShipOrderGenericProcessXX<first letter of last name> to Project lines`. Then click **OK**.
32. On the **Manage Orchestration Process Assignment Rules** page, add this description: `Process assignment rule for lines with Project details.` Then click **OK**.
33. Click the **Enter Description** text next to **IF** and enter: `Line type is Project`. Note: If you can't enter information in the Visual Information Builder, then clear the browser cache and try the action again. Then, click **OK**.
34. On the **Manage Orchestration Process Assignment Rules** page, click the **New Condition** icon below the description you just entered. This screenshot shows the round **New Condition** icon below the If statement.

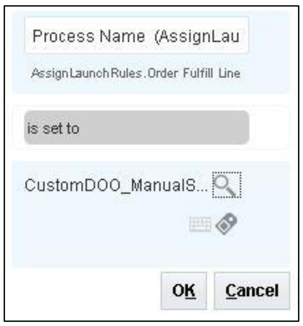
35. In the **Create Condition** dialog box, begin entering: `Line Type`. Select Line Type (AssignLaunchRules.Order Fulfill Line).
36. Select "is equal to."
37. Click the **Value** icon , and then select **Projects**. Click **OK**.
38. Click the **Then** icon and select DO.



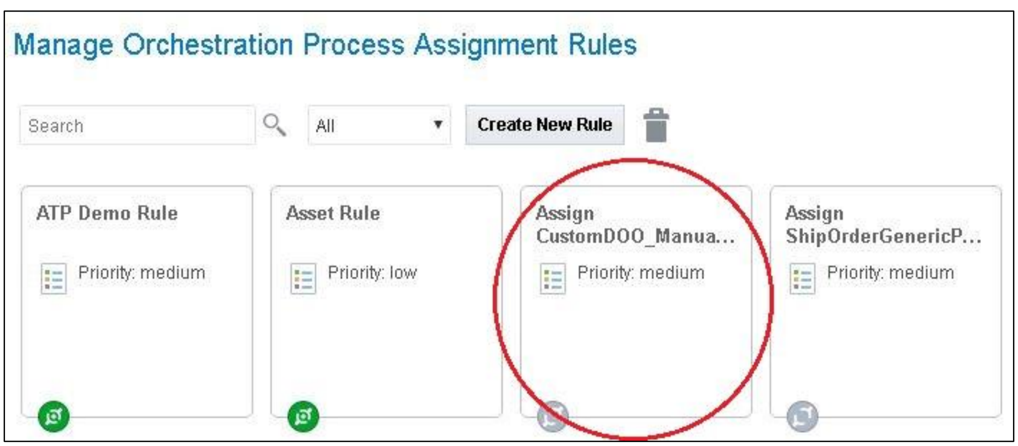
39. In the **Description** field, enter: `Assign Manual Ship Order Generic Process`. Then click **OK**.

40. Click the **New Action** icon. This screenshot shows the round **New Action** icon below the If statement.

41. In the **Create Action** dialog box window, begin entering: `Process`. Select Process Name (AssignLaunchRules.Order Fulfill Line) from the list of options that appear.
42. Make sure the next field reads: “is set to”
43. In the field below “is set to,” search for and select CustomDOO_ManualShipOrderGenericProcessXX<first letter of your last name>. Then click **OK**.



44. In the **Create Action** dialog box, click **OK**.
45. On the **Manage Orchestration Process Assignment Rules** page, click **Save and Close**.
46. On the **Manage Orchestration Process Assignment Rules** page that lists all the rules, locate your rule, and click it once.



47. In the **Assign CustomDOO_ManualShipOrderGenericProcessXX** dialog box, select **Activate Rule** and then **Save and Close**.

Practice Complete

You’ve enabled Projects in Order Management by opting in for the Process Sales Orders for Projects feature, creating a new line type, and modifying an orchestration process so it bills correctly.

Practice 5-5: Setting Up Sales Agreements in Order Management

Overview

Your company has sales agreements that you want users to reference when they create sales orders. To see the sales agreements in Order Management, you must enable Contracts to work with Order Management.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Create a Contract
- Promote Price Algorithms

Tasks

Create a Contract

1. Log in as a contract administrator. Use this login: Jack.Robins
2. From the **Navigator**, click **Contract Management**, and then click **Contracts**.
3. On the **Contracts** page, click **Create Contract**.
4. In the **Create Contract** dialog box, select:

Field	Value
Business Unit	US1 Business Unit
Legal Entity	US1 Legal Entity
Type	OM Sales Agreement
Number	101 This value appears in the Sales Agreement attribute throughout the Order Management work area.
Primary Party	Computer Service and Rentals
Pricing Effective Date	Current effective date
Start Date	Current effective date
End Date	
Currency	USD - US Dollar
Authoring Party	Internal

5. Click **Save and Continue**.
6. On the **Edit Contract** page, click the **Lines** tab.
7. On the **Lines** tab, click **Actions** and then **Add**.
8. In the new line, select or enter:

Field	Value
Type	Product
Name	AS6647331
UOM	Ea
Price Application Rule	Apply to all qualifying price lists
Price List	Corporate
Adjustment Type	Discount percent
Adjustment	10
Adjustment Basis	List Price
Allow Price Book Override on Order	Selected
Minimum Quantity for Order	10
Start Date	Current effective date
End Date	

   If you don’t see all the above fields, click **View** and then select **Columns**. Locate and expose any missing columns.
9. Click **Submit**.
10. On the **Submit Contract: Reviewers** page, click **Submit**. After you submit the contract, the **Edit Contract** page appears again.
11. Sign out.

Promote Pricing Algorithms

12. From the **Navigator**, click **Order Management** and then **Pricing Administration**.
13. On the **Overview** page, click the **Tasks** panel tab, and then select **Manage Algorithms**.
14. On the **Manage Algorithms** page, click **Actions**, and then select **Promote All**.
15. When a warning appears, click **Yes**.
16. In the **Promoting Algorithms: Confirmation** dialog box, click **OK**.
17. Click **Done**.

Practice Complete

You’ve created a contract and promoted algorithms.

Practice 5-6: Setting Up Business Units for Selling Profit Centers

Overview

Your company sells items that belong to multiple profit centers. Very often, a single order contains items that belong to more than one profit center. You need to set the selling profit center on sales order lines because it may be different from the one on the order header.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Enable the “Specify Business Unit for Selling Profit Center for Goods and Services Tax” Feature
- Set the Business Unit for Selling Profit Center Order Management Parameter

Tasks

Enable the “Specify Business Unit for Selling Profit Center for Goods and Services Tax” Feature

1. From the **Navigator**, select **Others** and then click **Setup and Maintenance**.
2. On the **Setup** page, select the **Order Management** offering.
3. Click **Change Feature Opt In**.
4. On the **Opt In: Order Management** page, click the **Features** icon in the Order Management row.
5. On the **Edit Features: Order Management** page, scroll down and select **Enable** in the “Specify Business Unit for Selling Profit Center for Goods and Services Tax” row. Then, click **Done**.

Set the Business Unit for Selling Profit Center Order Management Parameter

6. From the **Navigator**, select **Others** and then click **Setup and Maintenance**.
7. On the **Setup** page, select the **Order Management** offering.
8. Search for the Manage Order Management Parameters task. Select the task in the **Orders** functional area.
9. On the **Manage Order Management Parameters** page, scroll down and select the **Business Unit for Selling Profit Center** parameter.
10. In the **Business Unit for Selling Profit Center: Values** area, the selections work like this:
    - If you select Order Management, then the Selling Profit Center attribute on the order line will be the same as the one on the order header.

- If you select Shipping Organization, then the Selling Profit Center attribute on the order line will be different from the one on the header. The business unit on the order line will be the one you select here.

  Delete the existing business unit. Then add a row, and select the US1 External Learning business unit and the Shipping Organization.

11. Click **Save and Close**.

Practice Complete

You've set up a business unit for a selling profit center.

Demo for Lesson 6: Pricing Strategies

Demo 6-1: Reviewing Matrixes for Pricing Segments and Strategy Assignments

Overview

You are the pricing administrator at OTC Corporation and responsible for implementing the pricing segments and strategies for your organization. As part of this demonstration, you review the matrix classes for pricing segments and strategy assignments, and review the conditions and results for those matrixes.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to Pricing Administration Work Area
- Review Matrix Classes
- Review Matrix Type

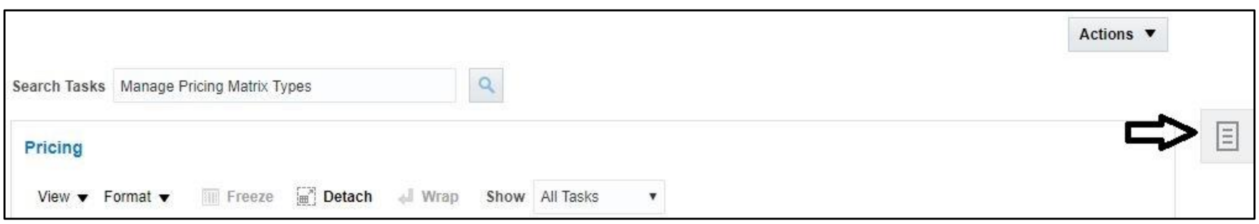
Tasks

Navigate to Pricing Administration Work Area

1. From the **Navigato**r, select **Order Management**, and then click **Pricing Administration**. On the **Overview** page of the **Pricing** work area, you can view the pricing and shipping rules that were recently updated or that are expiring.

Review Matrix Classes

2. Click the **Tasks** panel tab on the right, and view the list of tasks.



3. Click **Manage Matrix Classes**.
4. On the **Manage Matrix Classes** page, click **Pricing Segment**.
5. On the **Edit Matrix Class: Pricing Segment** page, review the **Pricing Segment** matrix class. You can use the values in the Condition Columns and Result Columns to define a pricing segment rule on the **Manage Pricing Segments** page.

The header region provides general information about the matrix class:

Field	Value
Name	Pricing Segment
Can Add New Columns	Selected
Public	Unselected
Service	Sales.PriceRequestInternal
Date Effectivity Enabled	Selected

6. The **Condition Columns** region displays matrix class rule conditional names, service mapping attributes, and compare conditions with the domain value. Review the Revenue Potential condition.

Field	Value
Name	Revenue Potential
Source Code Name	RevenuePotentialCode
Comparison	=
Compare to Attribute	CustomerPricingProfile.RevenuePotentialCode
Required	Unselected
Allow Null	Selected
Null Is Wildcard	Selected
Domain	Lookup: ORA_QP_REV_POTENTIAL_VALUES

Note: The **Compare to Attribute** list shows the sales service mapping source entity attributes.

7. Click the **Edit Domain** icon for the **Revenue Potential** condition.
8. In the **Edit Column Domain Values** dialog box, note the values that you can update. Click **Cancel**.

9. Review the Customer Size condition.

Field	Value
Name	Customer Size
Source Code Name	CustomerSizeCode
Comparison	=
Compare to Attribute	CustomerPricingProfile.CustomerSizeCode
Required	Unselected
Allow Null	Selected
Null Is Wildcard	Selected
Domain	Lookup: ORA_QP_CUSTOMER_SIZE_VALUES

10. Review the Cost To Serve condition.

Field	Value
Name	Cost To Serve
Source Code Name	CostToServeCode
Comparison	=
Compare to Attribute	CustomerPricingProfile.CostToServeCode
Required	Unselected
Allow Null	Selected
Null Is Wildcard	Selected
Domain	Lookup: ORA_QP_COST_TO_SERVE

11. Review the Customer Value condition.

Field	Value
Name	Customer Value
Source Code Name	CustomerValueCode
Comparison	=
Compare to Attribute	CustomerPricingProfileCustomerValueCode
Required	Unselected
Allow Null	Selected
Null Is Wildcard	Selected

Field	Value
Domain	Lookup: ORA_QP_CUSTOMER_VALUE_RANKINGS

12. Review the Customer Rating condition

Field	Value
Name	Customer Rating
Source Code Name	CustomerRatingCode
Comparison	=
Compare to Attribute	CustomerPricingProfileCustomerRatingCode
Required	Unselected
Allow Null	Selected
Null Is Wildcard	Selected
Domain	Lookup: ORA_QP_CUSTOMER_RATING_VALUES

13. Notice that the **Results Columns** region displays the details of the results that are available for this specific matrix class. The domain of this record is derived from a lookup.

Field	Value
Name	Pricing Segment
Source Code Name	PricingSeqmentCode
Required	Selected
Allow Null	Unselected
Domain	Lookup: ORA_QP_CUST_PRICING_SEGMENTS

Field	Value
Name	Precedence
Source Code Name	Precedence Code
Required	Selected
Allow Null	Unselected
Domain	None
Data Type	Number
Default Value	100 (Note: This is the default value for all rules)

14. Click **Cancel** to close the **Edit Matrix Class: Pricing Segment** page.
15. On the **Manage Matrix Classes** page, click the **Sales Pricing Strategy Assignment** predefined matrix class.
16. On the **Edit Matrix Class: Sales Pricing Strategy Assignment** page, review the matrix class. Note the following values on the header:

Field	Value
Name	Sales Pricing Strategy Assignment
Can Add New Columns	Selected
Public	Unselected
Service	PricingInternal.PriceRequestInternal
Date Effectivity Enabled	Unselected

17. Review the first condition.

Field	Value
Name	Channel Method
Source Code Name	SalesChannelCode
Comparison	=
Compare to Attribute	PricingHdrEff_Custom.SalesChannel_Custom
Required	Unselected
Allow Null	Selected
Null Is Wildcard	Selected
Domain	Lookup: ORA_QP_CHANNEL_METHODS

18. Review the second condition.

Field	Value
Name	Pricing Segment
Source Code Name	PricingSegmentCode
Comparison	=
Compare to Attribute	Header.PricingSegmentCode
Required	Unselected
Allow Null	Selected
Null Is Wildcard	Selected

Field	Value
Domain	Lookup: ORA_QP_CUST_PRICING_SEGMENTS

19. Review the third condition.

Field	Value
Name	Transaction Type
Source Code Name	TransactionTypeCode
Comparison	=
Compare to Attribute	Header.TransactionTypeCode
Required	Unselected
Allow Null	Selected
Null Is Wildcard	Selected
Domain	Lookup: ORA_QP_SALES_TRANSACTION_TYPES

20. Click the **Edit Domain** icon for the **Transaction Type** condition. In the **Edit Domain Values** dialog box, note the values that you can update. Click **Cancel**.

21. Point out that the **Result Columns** region displays matrix class rule results name and compare conditions with domain value. Click the **Edit Domain** icon for Pricing Strategy. In the **Edit Column Domain Values** dialog box, you see:

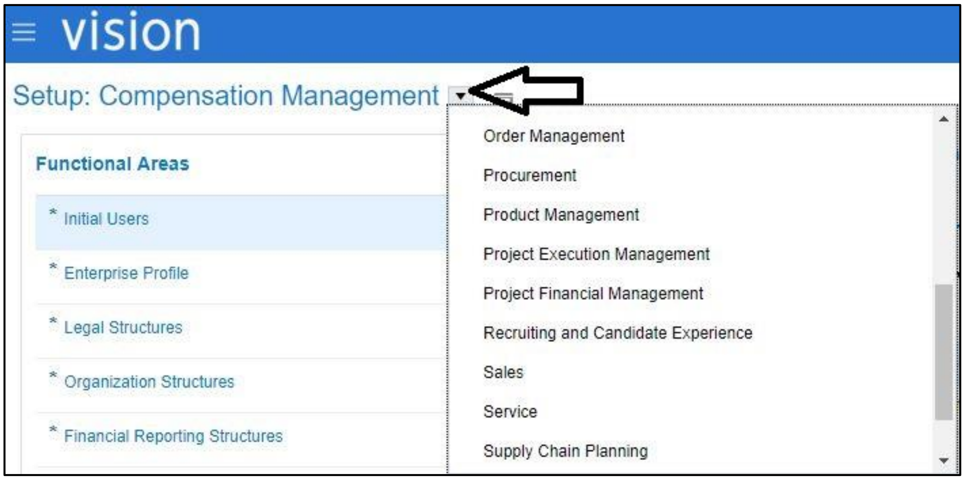
Field	Value
Name	Pricing Strategy
Source Code Name	PricingStrategyId
Required	Selected
Allow Null	Selected
Domain Type	View object query
View Object	PricingStrategyPVO
Key Attribute	PricingStrategyId
Display Attribute	Name
Data Type	Number

22. Click **Cancel** to close the dialog box.
23. Click **Cancel** to close the **Edit Matrix Class: Sales Pricing Strategy Assignment** page.
24. Click **Done** to close the **Manage Matrix Classes** page. This completes the review of matrix classes.

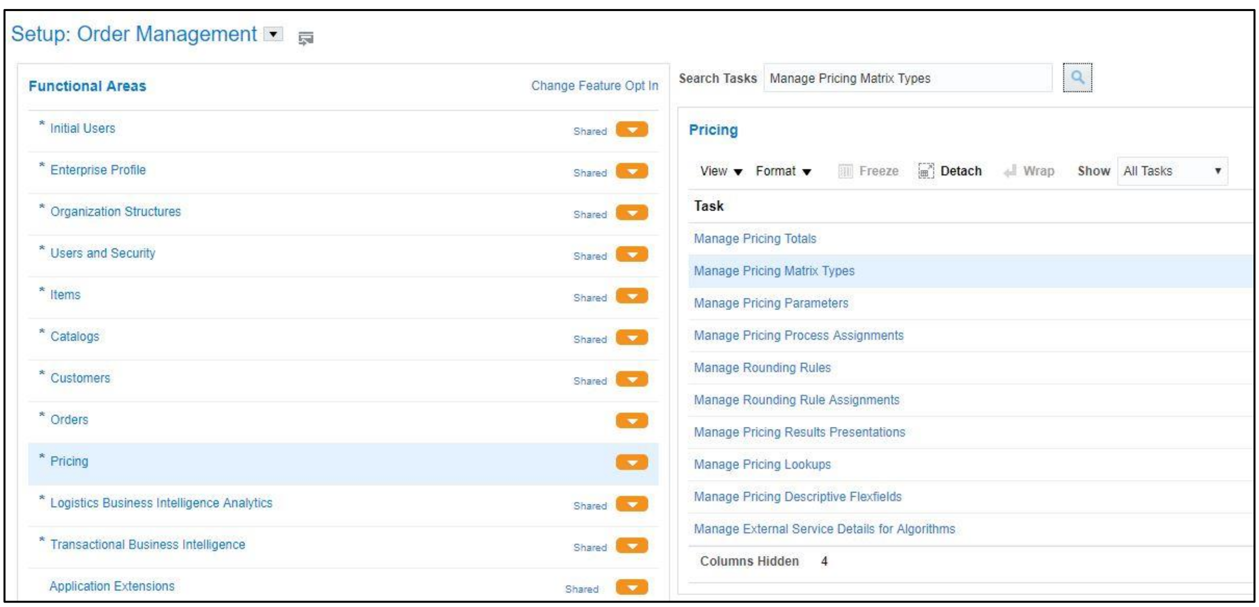
Review Matrix Type

After you review matrix classes, review matrix type, which is a setup task.

25. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
26. In the **Setup and Maintenance** work area, select the **Order Management** offering at the top of the page.



27. Search for the **Manage Pricing Matrix Types** task. Select the task in the **Pricing** functional area. The **Manage Pricing Matrix Types** page provides general information about the predefined matrix types.



28. Review the **Pricing Segment** matrix type first, and then review the **Sales Pricing Strategy Assignment** matrix type.

29. In the **Sales Pricing Strategy Assignment** matrix type, note that the code is mapped to a matrix class. In this case, it’s mapped to Sales Pricing Strategy Assignment.
30. Click **Cancel**.

Demo Complete

You have reviewed matrix classes and pricing matrix types that Pricing uses to derive a pricing segment and pricing strategy.

Practice for Lesson 6: Pricing Strategies

Practice 6-1: Reviewing Pricing Segment and Strategy

Overview

You're the pricing administrator at Vision Corporation and responsible for implementing the pricing segments and strategies for your organization, as well as maintaining the various pricing rules for price lists, discount lists, and shipping charge lists. As part of the upcoming annual pricing review, you're responsible for reviewing and implementing the current definitions of the pricing segments and strategies.

As part of this practice, you review:

- Customer pricing profile for Computer Service and Rentals
- Existing rules to determine a pricing segment
- Pricing strategy assignment rules

Then, determine whether to update the Corporate Pricing Strategy.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Add Lookup Codes
- Navigate to the Pricing Administration Overview Page
- Review Customer Pricing Profile
- Review Pricing Segment to Determine the Pricing Segment a Customer Falls In
- Review Pricing Strategy Assignment
- Review Pricing Strategy

Tasks

Add Lookup Codes

Review the Pricing lookups to see the attribute values in the Customer Pricing Profile and Pricing Segments. In addition, check that the setups for the matrix classes have been appropriately defined and associated with the correct matrix types. (Pricing Strategy Assignment matrix), and Pricing Segment matrix.

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering at the top of the page.
3. Search for and select the **Manage Pricing Lookups** task.

4. On the **Manage Pricing Lookups** page, in the **Lookup Type** field, enter: `ORA_QP_CUST_PRICING_SEGMENTS`. Then click **Search**.
5. Click the **New** icon in the **ORA_QP_CUST_PRICING_SEGMENTS: Lookup Codes** area. Add these values to the new row:

Field	Value
Lookup Code	STUDENT_XX
Enabled	Yes
Start Date	Any
Description	Any
Meaning	STUDENT_XX

Note: You can extend the values in the Customer Pricing Profile, if you need to. You can add lookup codes to any of these lookup types:

- ORA_QP_CUSTOMER_VALUE_RANKINGS (Customer Value)
- ORA_QP_CUSTOMER_RATING_VALUES (Customer Rating)
- ORA_QP_COST_TO_SERVE (Cost to Serve)
- ORA_QP_REV_POTENTIAL_VALUES (Revenue Potential)
- ORA_QP_CUSTOMER_SIZE_VALUES (Customer Size)

For now, add just the lookup code indicated in the table.

6. Click **Save and Close**.

Navigate to the Pricing Administration Overview Page

7. From the **Navigator**, select **Order Management**, and then click the **Pricing Administration** work area link.

Review Customer Pricing Profile

8. Click the **Tasks** panel tab on the right side of the page, and then select **Manage Customer Pricing Profiles**.
9. On the **Manage Customer Pricing Profiles** page, in the **Customer Name** field, enter: `Computer Service and Rentals`. Then click **Search**.
10. In the **Search** results, a row displays details of the customer's pricing profile. Note the following fields:

Field	Value
Customer Name	Computer Service and Rentals
Registry ID	10060 (Click View and then Columns to select it, if it's hidden.)
Revenue Potential	Very High
Cost To Serve	Low

Field	Value
Customer Value	Very high
Customer Rating	Very high
Customer Size	Large
Start Date	1/1/16
End Date	

Review Pricing Segment to Determine the Pricing Segment a Customer Falls In

11. Click the **Tasks** panel tab on the right, and then select **Manage Pricing Segments**. On the **Manage Pricing Segments** page, you can review the rules for deriving a customer segment for a customer.
12. Review the condition columns: **Revenue Potential**, **Customer Size**, **Cost To Serve**, **Customer Value**, and **Customer Rating**.
13. Review the result columns: **Pricing Segment, Precedence, Start Date,** and **End Date**. Check to see if the pricing segment you created in the lookups earlier is visible in the list of values for Pricing Segment.

    Which pricing segment does customer Computer Service and Rentals fall into? There may be many matching rules for a customer. If that's the case, then the rule with the lowest precedence number is applied.

Review Pricing Strategy Assignment

14. Click the **Tasks** panel tab, and then select **Manage Pricing Strategy Assignments**.
15. On the **Manage Pricing Strategy Assignments** page, review the assignment details:

Field	Value
Assignment Level	Header
Pricing Context	Sales
Transaction Type	All
Start Date	1/1/16
End Date	

16. Select the strategy assignment Header row, and review the line for the Pricing Segment value called Corporate Segment Group 1.
17. Review the condition columns: **Channel Method**, **Pricing Segment**, and **Transaction Type**.
18. Review the **Pricing Strategy** result column. Notice how, for the Pricing Segment value Corporate Segment Group 1, the pricing strategy value Corporate Pricing Strategy Group 1

is assigned. The pricing strategy is assigned based on the value of the Pricing Segment column.

19. Verify that, based on the rules on the **Manage Pricing Segments** and **Manage Pricing Strategy Assignments** pages, the customer Computer Service and Rentals belongs to:
    - Pricing segment=Corporate Segment Group 1
    - Pricing strategy=Corporate Pricing Strategy Group 1
20. Click the **Tasks** panel tab, and then select **Manage Pricing Strategies**.
21. On the **Manage Pricing Strategies** page, in the **Name** field, enter: `Corporate Pricing Strategy`. Then, click **Search**.
22. In the **Search** results, each row displays a pricing strategy.
23. Click **Corporate Pricing Strategy** to review the strategy details:

Field	Value
Strategy Name	Corporate Pricing Strategy
Objective	Revenue maximization
Business Unit	US1 Business Unit. This value indicates that a user with access to US1 Business Unit can manage this strategy.
Default Currency	USD
Status	Approved
Start Date	1/1/16
End Date	

24. Note that the **Pricing Rules** tab appears open by default. Review all the pricing and shipping rules that are associated with this strategy.
25. Review the **Price Lists** details, focusing on the segment price lists. The table below shows details of the Corporate Segment price list.

Column Group	Field	Value
Segment Price List Details	Price List Name	Corporate Segment Price List
Segment Price List Details	Description	Corporate Segment Price List - US
Segment Price List Details	Business Unit	US1 Business Unit
Segment Price List Details	Currency	USD
Segment Price List Details	Status	Approved
Segment Price List Details	Start Date	1/1/16
Segment Price List Details	End Date	
Strategy Association Details	Start Date	1/1/16

Column Group	Field	Value
Strategy Association Details	End Date	
Strategy Association Details	Precedence	2

26. Review the **Discount Lists** details:

Column Group	Field	Value
Discount List Details	Name	Corporate Discount List
Discount List Details	Currency	USD
Discount List Details	Business Unit	US1 Business Unit
Discount List Details	Status	Approved
Discount List Details	Start Date	1/1/16
Discount List Details	End Date	
Strategy Association Details	Start Date	1/1/16
Strategy Association Details	End Date	
Strategy Association Details	Precedence	1

27. Click the **Shipping Rules** tab.
28. Review the **Shipping Charge Lists** table:

Column Group	Field	Value
Shipping Charge List Details	Name	Corporate Shipping Charge List
Shipping Charge List Details	Currency	USD
Shipping Charge List Details	Business Unit	US1 Business Unit
Shipping Charge List Details	Status	Approved
Shipping Charge List Details	Start Date	1/1/16
Shipping Charge List Details	End Date	
Strategy Association Details	Start Date	1/1/16
Strategy Association Details	End Date	
Strategy Association Details	Precedence	1

Practice Complete

You’ve reviewed a customer pricing profile, pricing segment, pricing strategy assignment, and pricing strategy.

Optional Practice

1. Create a new pricing strategy by duplicating the Corporate Pricing Strategy. Enter the name: `XX – Corporate Pricing Strategy`.
2. When you copy the strategy, enter the details of the name, start date, and so on.
3. Add another price list to that strategy. Set the association start date.
4. Set up the rules for deriving the Corporate Pricing Strategy using your segment or your XX – Corporate Pricing Strategy.

Demos for Lesson 7: Pricing Orders: Price Lists

Demo 7-1: Reviewing Price Lists

Overview

This demonstration shows how to review and manage price list information for a configured item.

You are the Pricing Administrator for your company. As part of your yearly pricing review, you must review the current pricing on the Corporate Segment Price List for a standard item and configured item

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Ensure that the Pricing Charge Definition for Recurring Sale Price Is Setup Enabled
- Review Price Elements
- Review Price List
- Define Charges for Configured Item

Tasks

Ensure that the Pricing Charge Definition for Recurring Sale Price Is Setup Enabled

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Pricing Charge Definitions** task. Select the task in the **Pricing** functional area.
4. On the **Manage Pricing Charge Definitions** page, in the **Applies To** field, select **Price**. Then, click **Search**.
5. In the search results, the predefined pricing charge definitions for price charges appear. Discuss the predefined pricing charge definitions.
6. Select the **Recurring Sale Price** row.
7. For recurring charges (price type = recurring), you must select a price periodicity. The list of values for price periodicity is derived from the following potential sources: Price Periodicity UOM class that is assigned for recurring charges defined on the **Manage Pricing Charge Definitions** page and the **Default Price Periodicity UOM Class** pricing parameter from the **Manage Pricing Parameters** page. This is a recurring charge, so the price periodicity UOM class must have a value. Set this value to `Time` for at least one of the sources.

   First, check the price periodicity UOM class in the **Recurring Sale Price** row.

8. If you don't see a price periodicity UOM class in the **Recurring Sale Price** row, then check the default Price Periodicity UOM class. Start by going to the **Setup and Maintenance** work area.
9. In the **Setup and Maintenance** work area, select the **Order Management** offering.
10. Search for the **Manage Pricing Parameters** task. Select the task in the **Pricing** functional area.
11. Click **Yes** in the warning that appears.
12. On the **Manage Pricing Parameters** page, select Default Price Periodicity UOM Class. In the **Default Price Periodicity UOM Class: Values** area, select Time.
13. Click **Save and Close**.
14. On the **Setup: Order Management** page, search for the Manage Pricing Charge Definitions task. Select the task in the **Pricing** functional area.
15. On the **Manage Pricing Charge Definitions** page, in the **Applies To** field, select **Price**. Then, click **Search**.
16. Select the **Recurring Sale Price** row.
17. Select the **Setup Enabled** check box, if it isn't selected already. This pricing charge definition is now available for use in a pricing setup in **Pricing Administration**.
18. Click **Save and Close**.

Review Price Elements

19. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
20. In the **Setup and Maintenance** work area, select the **Order Management** offering.
21. Search for the **Manage Price Elements** task. Select the task in the **Pricing** functional area.
22. On the **Manage Price Elements** page, in the **Predefined** field, select **Yes**. Then, click **Search**. The **Search Results** section displays all the predefined price elements.
23. Describe the different types of price elements (price, cost, adjustment, margin, and tax). These elements are the "price points" that the pricing engine calculates as part of price execution.

    Note: For price lists, the base list price is captured on the price list charge. Any adjustments that are applied from the price list are calculated from the base list price to arrive at the list price.
24. Click **Cancel** to close the **Manage Price Elements** page. Click **Yes** if a message asks you if you want to proceed.

Review Price List

25. From the **Navigator**, select **Order Management**, and then click **Pricing Administration**.
26. In the **Pricing Administration** work area, click the **Tasks** panel tab, and then select **Manage Price Lists.**
27. On the **Manage Price Lists** page, in the **Name** field, enter: `Corporate`. This is the price list associated with the pricing strategy called Corporate Pricing Strategy, used in the order from the Order-to-Cash Overview demonstration.

28. Click **Search**.
29. In the search results, click the **Corporate Segment Price List** name link. On the **Edit Price List: Corporate Segment Price List** page, you can review and edit the pricing rules defined for the price list. The page consists of a **Price List** header and several tabs: **Price List Lines**, **Price List Lines Default Values**, **Access Sets**, and **References**.
30. Click the **Price List Lines** tab.
31. Search for item AS46336. This is the item ordered in the Order-to-Cash Overview demonstration.
32. Review the item lines details:

Field	Value
Item	AS46336
Line Type	Buy
Pricing UOM	Ea

33. Review the charge details in the **AS46336 - Buy - Each - Charge** section:

Field	Value
Line Number	1
Pricing Charge Definition	Sale Price
Calculation Method	Price
Base Price	170.00 USD
Start Date	1/1/16
End Date	

34. Click the **Access Sets** tab. Access sets control runtime execution access to the price list for the business units associated to the access set.
35. Review the set code. It should be COMMON.
36. Click the **References** tab. Note that the price strategy is Corporate Pricing Strategy. You can conclude the following from this setup: In this order, the base price for item AS46336 is derived from the Corporate Segment Price List, and is 170.00 USD per unit.

Define Charges for Configured Item

37. Click the **Price List Lines** tab to define charges for a configured item.
38. Search for item AT6751000.
39. Review the line item details:

Field	Value
Item	AT6751000

Field	Value
Line Type	Buy
Pricing UOM	Ea (This value is there by default.)

40. If a charge is already defined in the **AT6751000 – Buy – Ea: Charge** area, then enter an end date that is after the start date but before today's date.
41. Click the **Create Charge** button on the right side of the page if you want to add a charge.
42. In the **Create Price List Charge** dialog box, add the following:

Field	Value
Pricing Charge Definition	Sale Price
Calculation Method	Price
Base Price	329.00 USD
Start Date	1/1/2016 3:45 PM
End Date	

If there was already an existing charge, then change the base price and enter a start date after the end date of the existing charge.

43. Click **OK**.
44. Click the **Associated Items** icon at the end of the item line for item AT6751000. A warning may appear stating that your changes will be saved and asking if you want to continue. Click **Save and Continue**.
45. On the **Edit Component Item Charges: AT6751000** page, locate the **Item Structure Details** section. The configured item hierarchical structure appears.
46. Select option class **OC4751100** and expand it.
47. Select component item **CM4751101**.
48. In the **Charge** section, review the following values:

Field	Value
Pricing Charge Definition	Sale Price
Calculation Method	Price
Base Price	0.00 USD
Start Date	1/1/16 3:45 PM
End Date	

49. Select component item **CM4751102**.

50. In the **Charge** section, review the following values:

Field	Value
Pricing Charge Definition	Sale Price
Calculation Method	Price
Base Price	25.00 USD
Start Date	1/1/16 3:45 PM
End Date	

51. Review the other component items in the other option classes as necessary. Every component item of the configuration must have at least one defined charge.
52. Click **View Summary**.
53. Navigate to the flat structure view of the configured item AT6751000.
54. Click **Save and Close** on the **Edit Component Item Charges: AT6751000** page.
55. Click **Save and Close** on the **Edit Price List: Corporate Segment Price List** page.

Demo Complete

You have reviewed and managed price list information for a standard and a configured item.

Demo 7-2: Reviewing Price Lists for Coverage Items

Overview

This demonstration shows how to review and manage price list information for a coverage item.

You are the Pricing Administrator for your company. As part of your yearly pricing review, you need to review the current pricing on the Corporate Segment Price List for a coverage item.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Review Price Elements
- Review Pricing Bases
- Review Price List

Tasks

Review Price Elements

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for **Manage Price Elements** task. Select the task in the **Pricing** functional area.
4. On the **Manage Price Elements** page, in the **Predefined** field, select **Yes** to search for all predefined price elements.
5. Click **Search**. The **Search Results** section displays all the predefined price elements.
6. Describe the different types of price elements (price, cost, adjustment, margin, and tax). They are considered the price points that the pricing engine calculates as part of price execution.

   Note that for price lists, the base list price appears on the price list charge. To arrive at the list price, Pricing applies adjustments from the price list to the base list price.
7. Click **Cancel** to close the **Manage Price Elements** page.
8. Click **Yes** in the warning that asks if you want to continue.

Review Pricing Bases

9. In the **Setup and Maintenance** work area, select the **Order Management** offering.
10. Search for the **Manage Pricing Bases** task. Select the task in the **Pricing** functional area.
11. On the **Manage Pricing Bases** page, in the **Usage** field, select **Coverage basis** to search for usage.

12. Click **Search**. The **Search Results** section displays all the pricing bases for usage of coverage basis.
13. Describe the coverage basis. It allows you to define a coverage item price based on a percentage of the covered item.
14. Click **Done** to close the **Manage Pricing Bases** page.

Review Price List

15. From the **Navigator**, select **Supply Chain Execution**, and then click **Pricing Administration**.
16. Click the **Tasks** panel tab, and then select **Manage Price Lists**. On the **Manage Price Lists** page, you can search for existing price lists and manage them.
17. In the **Name** field, enter: `Corporate` to search for a price list.
    Note: This is the price list associated with the pricing strategy Corporate Pricing Strategy, used in the order from the Order-to-Cash Overview demonstration.
18. Click **Search**.
19. Click the Corporate Segment Price List name link in the search results. On the **Edit Price List: Corporate Segment Price List** page, you can review and edit the pricing rules defined for the price list. The page consists of a Price List header and several tabs: **Price List Lines**, **Price List Lines Default Values**, **Access Sets**, and **References**.
20. Click the **Price List Lines** tab.
21. Search for the item: `EW0002-R`.

    Note: This is the item ordered in the Order-to-Cash Overview demonstration.
22. Review the item line details:

Field	Value
Item	EW0002-R
Line Type	Buy
Pricing UOM	Year

23. Review the associated item details for EW0002-R by clicking the **Associated Items** icon. In this case, there aren't any associated items.
24. On **Manage Covered Items: EW0002-R** edit page:
    a) In the **All Items** tab, search for the Add action type.
    b) In the **Charge** section, review the following values:

Field	Value
Line Number	1
Pricing Charge Definition	Recurring Charge –Warranty/Service
Price Type	Recurring
Charge type	Service

Field	Value
Charge Subtype	Price
Price Periodicity	Mnth
Calculation Method	Price
Base Price	3.00
Allow manual adjustment	Selected
Start Date	1/1/17
End Date	

You can conclude the following from this setup: The base price for a coverage item, **EW0002-R**, in this order, is derived from the Corporate Segment Price List and is 3.00 USD per unit.

Demo Complete

You have reviewed and managed price list information for a coverage item.

Demo 7-3: Reviewing Price Lists for Subscription Items

Overview

This demo shows how to review and manage price list information for a subscription item.

You are the Pricing Administrator for your company. As part of your yearly pricing review, you need to review the current pricing on the Corporate Segment Price List for a subscription item.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Review Pricing Basis
- Review Price Elements
- Review Price List

Tasks

Review Price Elements

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. On the **Setup: Order Management** page, search for the **Manage Price Elements** task. Select the task in the **Pricing** functional area.
4. On the **Manage Price Elements** page, in the **Predefined** field, select **Yes**. Then, click **Search**. The **Search Results** section displays all the predefined price elements.
5. Describe the different types of price elements (price, cost, adjustment, margin, and tax). These price elements are considered the "price points" that the pricing engine calculates as part of price execution.

   Note that for price lists, Pricing captures the base list price on the price list charge. Any adjustments that you apply from the price list are calculated from the base list price to arrive at the list price.
6. Click **Cancel** to close the **Manage Price Elements** page.
7. Click **Yes** in the warning that asks if you want to continue.

Review the Price List

8. From the **Navigator**, select **Supply Chain Execution**, and then click **Pricing Administration**.
9. On the **Overview** page, click the **Tasks** panel tab, and then select **Manage Price Lists**. On the **Manage Price Lists** page, you can search for existing price lists and manage them.
10. To search for a price list, in the **Name** field, enter: `Corporate`.

Note: This is the price list associated with the pricing strategy Corporate Pricing Strategy, used in the order from the Order-to-Cash Overview demonstration.

11. Click **Search**.
12. Click the **Corporate Segment Price List** name link in the search results. On the **Edit Price List: Corporate Segment Price List** page, you can review and edit the pricing rules defined for the price list. The page consists of a Price List header and several tabs: **Price List Lines**, **Price List Line Default Values, Access Sets**, and **References**.
13. Click the **Price List Lines** tab.
14. Search for the item: **SUB23345**.
15. View the item and the charge information below it.

Field	Value
Item	SUB23345
Pricing UOM	Week
Line Type	Buy
Service Duration Period	Week
Service Duration	52

16. In the **Charge** section of the subscription in the price list, review the following values:

Field	Value
Line Number	1
Pricing Charge Definition	Recurring Charge – Warranty/Service
Price Type	Recurring
Charge Type	Service
Charge Subtype	Price
Pricing Periodicity	Week
Calculation Method	Price
Base Price	5.00
Allow manual adjustment	Selected
Start Date	1/1/18
End Date	

17. Click **Cancel** at the top of the page.

Review the Item Definition

18. From the **Navigator**, select **Product Management**, and then click **Product Information Management**.
19. Click the **Search** panel tab, select **Item**, and then search for SUB23345.

20. Click the linked item to proceed to the **Edit Item** page.
21. In the **Specifications** tab under **Item Organization**, select **Sales and Order Management**. The sales product type must be Subscription.
22. Under **Item Organization**, select **Service**. In this demonstration, we take an item that is defined as a service duration type of variable, which is for 52 weeks. Other service duration types are fixed and open-ended.

    Note: The service duration type that you select in the item definition affects what you can select when you define a charge in the price list.

    - **Variable:** When you define a subscription item with this service duration type, the duration and duration period appear in the price list when you are adding a charge. Because the type is defined as variable, you can overwrite the duration and duration period in Pricing when you define a charge; however, you can’t edit it in the charge later.
    - **Open-Ended:** When you define a subscription item with this service duration type, no duration and duration period appear in the price list.
    - **Fixed:** When you define a subscription item with this service duration type, the duration and duration period appear in the price list, but you can’t edit them at any time in Pricing.

    When you place an order in the Order Management work area while deriving a charge for a subscription item, the application matches the service duration period and service duration that are selected for that particular order line. Therefore, it’s important to have all possible prices that you want to support for a business flow.
23. Click **Cancel**.

Demo Complete

You have reviewed and managed price list information for a subscription item. You can conclude the following from this setup: The base price for subscription item SUB23345 in this order is derived from the Corporate Segment Price List and is 5.00 USD per unit per month.

Practices for Lesson 7: Price Lists

Practice 7-1: Creating a Price List for a Standard Item With Multiple Charges

Overview

In this practice, you'll create a price list for a standard item with multiple charges.

You're the pricing administrator for a large multinational corporation. As part of the yearly pricing review, you need to create special pricing for this upcoming year. As a start, you add two charges (one-time and recurring) for a standard item.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Ensure that the Pricing Charge Definition for Recurring Sale Price Is Setup Enabled
- Create a Price List and Enter Price List Header Values
- Add Item and Charge Details

Tasks

Make Sure That the Pricing Charge Definition for Recurring Sale Price Is Setup Enabled

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. On the **Setup: Order Management** page, search for the **Manage Pricing Charge Definitions** task. Select the task in the **Pricing** functional area.
4. On the **Manage Pricing Charge Definitions** page, in the **Name** field, enter: `Recurring Sale Price`. Then click **Search**. To add the recurring sale price charge, you need to ensure that the charge definition is setup enabled. You'll need to get the details of the price periodicity. For example, the charge definition may have monthly recurring or yearly recurring charges. As part of these tasks, we are going to look at the parameter and the charge definition.
5. The values from the Price Periodicity UOM potentially come from the units of measure of the UOM class specified in either of these places:
    - Pricing parameter called Default Price Periodicity UOM Class
    - Price periodicity UOM class of the pricing charge definition

    If you don't see a price periodicity UOM class on this page, then follow these steps:

    a. On the **Setup and Maintenance** page, select the **Order Management** offering.

b. On the **Setup: Order Management** page, search for the Manage Pricing Parameters task. Select the task in the **Pricing** functional area.

c. On the **Manage Pricing Parameters** page, in the **Default Price Periodicity UOM Class: Values** section, in the **Value** list, select Time. Click **Yes** if a warning appears.

d. Click **Save and Close**.

You need to perform these steps only once per environment.

6. On the **Setup: Order Management** page, click **Manage Pricing Charge Definitions**.
7. On the **Manage Pricing Charge Definitions** page, search for Recurring Sale Price.
8. In the **Recurring Sale Price: Details** area, select the **Setup Enabled** check box, if it isn't selected already.
9. Click **Save and Close**.

Create a Price List and Enter Price List Header Values

10. From the **Navigator**, select **Order Management**, and then click **Pricing Administration**. Click the **Tasks** panel tab on the right side of the page, and then select **Manage Price Lists**.
11. On the **Manage Price Lists** page, click **Actions**, and then select **Create.**
12. In the **Create Price List** dialog box, enter:

Field	Value
Name	XX_Price_List
Business Unit	US1 Business Unit
Start Date	Current effective date
End Date	
Type	Segment price list
Currency	USD

13. Click **Save and Edit**.

Add Item and Charge Details

14. On the **Price List Lines** tab of the **Edit Price List: XX_Price_List** page, click the **Actions** menu in the **Search Results** area. Then select **Add Row**.
15. In the new row, enter:

Field	Value
Item	AS46336
Pricing UOM	Ea
Line Type	Buy

Field	Value
Primary Pricing UOM	Selected (Default value for first occurrence of item on the price list.)

16. Click **Create Charge**.
17. Enter:

Field	Value
Pricing Charge Definition	Sale Price
Calculation Method	Price
Base Price	300
Start Date	Current effective date
End Date	Current effective date + 1 day

18. Click **Create Charge** in the **Charge** area to add a recurring charge.
19. In the **Create Price List Charge** dialog box, enter:

Field	Value
Pricing Charge Definition	Recurring Sale Price
Price Periodicity	Week
Calculation Method	Price
Base Price	50.00 USD
Start Date	Current effective date
End Date	

20. Click **OK** to close the dialog box. The new price list XX_Price_List includes item AS46336, and one-time and recurring charges.
21. Click **Save** at the top of the **Edit Price List: XX_Price_List** page to save the price list.
22. Click the **Access Sets** tab.
23. Click **Actions**, and then select **Add Row**.
24. Click the arrow of the **Set Code** list. Click **Search**. Then search for and select **COMMON**. Click **OK** to close the **Search and Select Set Code** dialog box.
25. Click **Approve**. A warning asks you to confirm the changes. Click **OK**.
26. Click **Save and Close**.
27. On the **Manage Price Lists** page, click **Done**.

Practice Complete

You’ve created a price list for a standard item with multiple charges.

Additional Practice Options

1. Add another charge for the item for a different date range.

2. Add another charge for the item.
3. Add a sales charge of $10 for all items.
4. Add tiered adjustments for a standard item.

Practice 7-2: Adding a New Condition Column to a Matrix Class

Overview

This practice shows how to add a condition for pricing segment to a predefined Price List Charge Adjustment Matrix Class. You'll add a new price list item record and charge combination.

Prerequisites

- Items, pricing setups, and other entities, required for price list setup, are set by the instructor before the training.
- Practice 7-1

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Pricing Administration Overview Page
- Review Price List
- Edit Column Domain Values
- Validate New Matrix Class in the Pricing Administration Overview Page
- Create a Price List and Enter Price List Header Values
- Add Item and Charge Details

Tasks

Navigate to the Pricing Administration Overview Page

1. From the **Navigator,** select **Order Management**, and then click **Pricing Administration**. The **Overview** page in the Pricing work area displays high-level information about:
   - Last-updated pricing rules
   - Last-updated shipping rules
   - Rules that are about to expire

Review Price List

2. On the **Overview** page, click the **Tasks** panel tab and then select **Manage Matrix Classes**. On the **Manage Matrix Classes** page, you can see the predefined matrix classes.
3. Click the **Price List Charge Adjustment** link. The **Edit Matrix Class: Price List Charge Adjustment** tab opens. Here you can review conditions and results.
4. In the **Condition Columns** region, click **Actions,** and then select **Add Row**.

5. Enter:

Field	Value
Name	Pricing Segment XX
Source Code Name	PricingSegmentXX
Comparison	=
Compare Attribute	Header.PricingSegmentCode

Edit Column Domain Values

6. In the same row where you entered the above values, click the **Edit** icon for **Domain**.

7. Enter:

Field	Value
Domain Type	Lookup
Lookup	ORA_QP_CUST_PRICING_SEGMENTS

Note: After selecting the Domain Type, the appropriate **Lookup** field appears. You might need to use the search function in the **Edit Column Domain Values** dialog box to find the value listed above. You can leave Default Value blank.

8. In the **Edit Column Domain Values** dialog box, click **OK**.
9. On the **Edit Matrix Class: Price List Charge Adjustment** page, click **Save**.

Validate New Matrix Class in the Pricing Administration Overview Page

Create a Price List and Enter Price List Header Values

10. In the **Tasks** panel tab, select **Manage Price Lists**.
11. On the **Manage Price Lists** page, in the **Search Results** section, search for the price list you created earlier **(XX_Price_List)**.
12. Click the link.

Add Item and Charge Details

13. On the **Edit Price List: XX_Price_List** page, click the **Price List Lines** tab.
14. Search for item AS46336.
15. In the **AS46336 – Buy – Ea: Charge** area, click the **Create** icon.

16. In the **Create Price List Charge** dialog box, enter:

Field	Value
Pricing Charge Definition	Sale Price
Calculation Method	Price
Base Price	500.00 USD
Start Date	Current effective date +2
End Date	

Then click **OK**.

17. In the **AS46336 – Buy - Ea: Charge** area, click the arrow next to **Add Tiered Adjustment**, and then select **Create Price Adjustment Matrix**.
18. In the **Create Price Adjustment Matrix** dialog box, select the **Pricing Segment <XX>** optional condition column, and click **OK**.
19. In the **Sale Price: Price Adjustments** area, click the **Add Row** icon.
20. Enter:

Field	Value
Pricing Segment	STUDENT_XX (select the segment you created in a previous practice)
Adjustment Type	Discount Amount
Adjustment Amount	10

21. Click **Save and Close**. The new price list <XX>_Price_List includes item AS46336 and a sale charge of USD 500, along with a USD10 adjustment based on the pricing segment.
22. Click **Done**.

Practice Complete

You’ve added a new condition column (Pricing Segment) in the Price List Charge Adjustment Matrix Class and viewed the condition column in the matrix rules.

Practice 7-3: Creating a Price List for a Coverage Item That Covers a Standard Item

Overview

In this practice, you'll create a price list for a coverage item where the pricing rule for the coverage item is 30% of the covered item's list price.

You are the pricing administrator for a large multinational corporation. As part of the yearly pricing review, you need to create special pricing for this upcoming year. As a start, you add one recurring charge for a coverage item.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Make Sure That the Pricing Basis for Coverage Basis Is Setup Enabled
- Create a Price List and Enter Price List Header Values
- Add Coverage Item and Charge Details

Tasks

Make Sure That the Pricing Basis for Coverage Basis Is Setup Enabled

1. From the **Navigator**, select **Others,** and then click **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, select the **Order Management** offering. Search for the **Manage Pricing Bases** task. Select the task in the **Pricing** functional area.
3. On the **Manage Pricing Bases** page, click **Actions**, and then select **Create**.
4. On the **Create Pricing Basis** page, enter:

Attribute	Value
Name	XX_Coverage Basis_List Price
Usage	Coverage basis
Active check box	Select
Price Type	Recurring
Charge Type	Sale
Charge Subtype	Price
Price Periodicity	All

5. Click **Save**.

Create a Price List and Enter Price List Header Values

6. From the **Navigator**, select **Order Management**, and then click **Pricing Administration**.
7. Click the **Tasks** panel tab on the right side of the page, and then select **Manage Price Lists**.
8. On the **Manage Price Lists** page, click **Actions** and then select **Create**.
9. In the **Create Price List** dialog box, enter:

Attribute	Value
Name	XX_Price_List_Coverage
Business Unit	US1 Business Unit
Currency	USD
Type	Segment price list
Start Date	Current effective date
End Date	

10. Click **Save and Edit**.

Add Coverage Item and Charge Details

11. On the **Edit Price List: XX_Price_List_Coverage** page, click the **Price List Lines** tab.
12. Click **Actions**, and then select **Add Row**.
13. In the new row, in the **Item** field, enter: `EW0002-R`. Then tab out of the rest of the fields to populate it.
14. Click **Save** at the top of the page.
15. Click the **Manage Covered Item** icon in the **Associated Items** column of the new row.

16. On the **Manage Covered Items: EW0002-R** page, click the **Add Row** icon. Then, enter:

Attribute	Value
Pricing UOM	Ea
Coverage UOM	Year
Action Type	Add

17. Click **Create Charge**.

18. Enter:

Attribute	Value
Pricing Charge Definition	Recurring Sale Price
Price Periodicity	Mnth
Calculation Method	Covered item price percent
Coverage Basis	XX_Coverage Basis_List Price (New basis that's defined)
Calculation Amount	30%
Start Date	Current effective date
End Date	Current effective date + 1 day

19. At the top of the page, click **Save and Close**.
20. Click the **Access Sets** tab, and add a row.
21. In the **Set Code** list, select **COMMON**.
22. Click **Approve**. A warning prompts you to confirm the changes. Click **OK** to confirm.
23. Click **Save and Close**.

Practice Complete

You've created a price list for a coverage item where the price is based on 30% of the covered item's list price. The charge is a recurring monthly sales charge.

Additional Practice Options

1. Add another charge for the item for a different date range.
2. Add another charge for different combination of covered item UOM and coverage UOM.
3. Add one-time sales charge of USD10 (which isn't percentage-based).

Demos for Lesson 8: Pricing Orders: Discount Lists

Demo 8-1: Reviewing a Discount List

Overview

You are a pricing administrator who is responsible for managing the discounts during the annual pricing review at Vision Corporation. You need to review the corporate-level discounts for standard items, which includes simple and tier discounts.

Prerequisites

Ensure that the Charge Definition for Recurring Sale Price is set to Setup Enabled in the Manage Pricing Charge Definitions task in the Setup and Maintenance work area. From the choice list, select Time in the Price Periodicity UOM Class list of values.

User Login

scm00.Instructor

Summary of Tasks

- Review Pricing Bases for Adjustment and Tier Bases
- Navigate to the Pricing Administration Overview Page
- Select and Review a Discount List
- Review Discount Lines
- Review Access Set
- Review Pricing Strategy References
- Review Tiered Discount for a Standard Item

Tasks

Review Pricing Bases for Adjustment and Tier Bases

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. On the **Setup: Order Management** page, search for the **Manage Pricing Bases** task. Select the task in the **Pricing** functional area.
4. On the **Manage Pricing Bases** page, in the **Usage** list, select **Adjustment basis**. Then, click **Search**.
5. Review the search results and explain how adjustment basis is used for percentage-based adjustments (discounts and markups).
6. In the **Search** area of the **Manage Pricing Bases** page, in the **Usage** list, select **Tier basis**. Then, click **Search**.
7. Review the search results, and explain how tier basis is used for amount-based tier adjustments.
8. Click **Done**.

Navigate to the Pricing Administration Overview Page

9. From the **Navigator**, select **Order Management**, and then click **Pricing Administration**.

Select and Review a Discount List

10. On the **Overview** page of the **Pricing** work area, click the **Tasks** panel tab, and then select **Manage Discount Lists**.
11. On the **Manage Discount Lists** page, in the **Name** field, enter: `Corporate Discount List`.
    Note: This discount list is associated with the strategy Corporate Pricing Strategy. Any edits you make to the discount list are applied to the order created in the Order-to-Cash Overview demonstration.
12. Click the **Search** button.
13. In the **Search Results** section, click the **Name** link for the **Corporate Discount List** row.
14. On the **Edit Discount List: Corporate Discount List** page, you can review and edit the discount rules defined for the discount list.
15. Discuss the following sections and tabs of the page: **Discount List** header, **Discount Lines**, **Discount Line Default Values**, **Access Sets**, and **Pricing Strategy References**.

Review Discount Lines

16. Click the **Discount Lines** tab.
17. In the **Name** field of the **Search** area, enter: `AS46336`.
    Note: This is the item ordered in the Order-to-Cash Overview demonstration.
18. Click **Search**.
19. In the **Search Results** table, review the item line details:

Field	Value
Item Name	AS46336
Pricing UOM	Ea
Line Type	Buy

20. Review the details in the **Discount Rules** section: Item – AS46336 – Each –Buy.

Field	Value
Rule Name	Tablet Promo-Summer
Rule Type	Simple
Start Date	4/1/16 6:31 PM
End Date	
Price Type	One time
Charge Type	Sale
Charge Subtype	Price

21. Review the values for the Tablet Promo-Summer: Details.

Field	Value
Adjustment Type	Discount Amount
Adjustment Amount	10 USD

Review Access Set

22. Click the **Access Sets** tab.
23. View the **Set Code**, which is COMMON.

    Note: Access Set limits runtime execution access to the discount list for the business units associated with the access set.

Review Pricing Strategy References

24. Click the **Pricing Strategy References** tab. Note that the strategy value is Corporate Pricing Strategy.

Review Tiered Discount for a Standard Item

25. Click the **Discount Lines** tab.
26. In the **Name** field of the **Search** area, enter: `AS4751100`. Then, click **Search**.
27. In the **Search Results** table, review the item line details. Note the rule type = Tiered pricing

Field	Value
Item Level	Item
Item	AS4751100
Line Type	Buy
Pricing UOM	Ea

28. Note that **Item - AS4751100 - Ea - Buy: Discount Rules** has the following sections: **Discount Rule** and **Apply Discount To**. These sections show which charge(s) this discount applies to. View the details.

Field	Value
Rule Name	Item Quantity
Rule Type	Tiered pricing
Price Type	One time
Charge Type	Sale
Charge Subtype	Price

29. In the **Tablet Promo - 2016: Details** section, review the following:

Calculation Basis

Field	Value
Tier Basis Type	Item quantity
Aggregation Method	On line
Apply To	Highest tier
Application Method	Per unit
Adjustment Type	Discount percent
Adjustment Basis	List Price

Tiered Pricing Rules

Field	Value
Minimum Quantity (>)	5
Maximum Quantity (<=)	15
Application Method	Per unit
Adjustment Type	Discount percent
Adjustment Amount	15
Adjustment Basis	List Price

Field	Value
Minimum Quantity (>)	15
Maximum Quantity (<=)	30
Application Method	Per unit
Adjustment Type	Discount percent
Adjustment Amount	17
Adjustment Basis	List Price

Field	Value
Minimum Quantity (>)	30
Maximum Quantity (<=)	
Application Method	Per unit
Adjustment Type	Discount percent
Adjustment Amount	20
Adjustment Basis	List Price

30. Click **Save and Close**.

Demo Complete

You have reviewed and managed a discount list.

Practice for Lesson 8: Discount Lists

Practice 8-1: Creating a Discount List for a Standard Item with Multiple Charges

Overview

In this practice, you create a discount list for a standard item with multiple charges.

You're a pricing administrator who's responsible for managing the discounts during the annual pricing review. You need to create some discounts for a standard item.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Pricing Administration Page
- Create a New Discount List with a Standard Product: Discount List Header
- Add Item and Charges
- Add Tiered Discount Lines

Tasks

Navigate to the Pricing Administration Page

1. From the **Navigator**, select **Order Management**, and then click **Pricing Administration**.

Create a New Discount List with a Standard Product: Discount List Header

2. On the **Overview** page of the **Pricing Administration** work area, click the **Tasks** panel tab on the right side of the page, and then select **Manage Discount Lists**.
3. On the **Manage Discount Lists** page, you can search for existing discount lists and manage them. Click **Actions**, and then select **Create**.
4. In the **Create Discount List** dialog box, enter:

Field	Value
Name	XX_Discount_List
Currency	USD
Business Unit	US1 Business Unit
Start Date	Current effective date
End Date	

5. Click **Save and Edit**.

Add Item and Charges

6. On the **Edit Discount List: XX_Discount_List** page, click the **Discount Lines** tab.
7. In the **Search Results** table, click **Actions**, and then select **Add Row**.
8. In the **Name** field of the **Search Results** table, enter: `AS46336`. Then press the Tab key.
   Note: This is the item ordered in the Order-to-Cash Overview demonstration.
9. Review the item-level options in the table.
10. In the **Line Type** list, select **Buy**.
11. In the **Discount Rules** table, click **Actions**, and then select **Create**. Select **Simple Rule**.
12. In the **Create Discount Rule** dialog box, enter:

Field	Value
Price Type	One time
Charge Type	Sale
Charge Subtype	Price
Name	XX Simple Discount
Rule Type	Simple (the value is defaulted)
Adjustment Type	Discount percent
Adjustment Amount	10
Adjustment Basis	List Price **Note:** The discount is 10 percent of the list price.
Rule Start Date	Current effective date

13. Click **OK**.
14. Click **Save**.
15. In the **Discount Rules** table, click **Actions**, select **Create**, and then **Simple Rule**. You're adding a discount rule that's applicable to all the recurring charges.

16. In the **Create Discount Rule** dialog box, enter:

Field	Value
Price Type	Recurring
Charge Type	All
Charge Subtype	All
Price Periodicity UOM	Week
Name	XX Recurring Discount
Type	Simple (the value is defaulted)
Adjustment Type	Discount Percent
Adjustment Amount	10
Adjustment Basis	List Price **Note:** The discount is 10 percent of the list price.
Rule Start Date	Current effective date
Rule End Date	

17. Click **OK**.
18. On the **Edit Discount List: XX_Discount_List** page, click **Save**. A new discount list, XX_Discount_List, is created for item AS46336. The new list has two discount rules: One Time and Recurring Discount.

Add Tiered Discount Lines

19. In the **Discount Rules** table, click the Create icon, and then select **Tier Based Rule**.
20. In the **Create Discount Rule** dialog box, enter:

Field	Value
Price Type	One time
Charge Type	Sale
Charge Subtype	Price
Rule Name	XX Tier Discount
Rule Type	Tiered pricing
Start Date	Current effective date
End Date	
Tier Basis Type	Item quantity
Aggregation Method	On line
Apply To	Highest tier

Field	Value
Application Method	Per unit
Adjustment Type	Discount amount

21. In the **Tiered Pricing Rules** table, click **Actions**, and then select **Add Row**. Enter:

Field	Value
Minimum Quantity (>)	5
Maximum Quantity (<=)	15
Application Method	Per unit
Adjustment Type	Discount amount
Adjustment Amount	10 USD

22. Add another row, and enter:

Field	Value
Minimum Quantity (>)	15
Maximum Quantity (<=)	
Application Method	Per unit
Adjustment Type	Discount amount
Adjustment Amount	20 USD

    You can conclude from this setup that, for a quantity between 5-15 units, a discount of 10 USD per unit applies.

23. Click **OK**.
24. On the **Edit Discount List** page, click **Save**.
25. Click the **Access Sets** tab, and add a row.
26. Click the arrow next to **Set Code**, and select **Search**.
27. In the **Search and Select: Set Code** dialog box, in the **Set Code** field, enter: `COMMON`. Then, click **Search**.
28. Select COMMON when it appears in the search results, and then click **OK**.
29. On the **Edit Discount List: XX_Discount_List** page, click **Approve**. A warning prompts you to confirm the changes. Click **OK**.

Practice Complete

You've created a discount list with simple and tiered pricing rules for a standard item.

Optional Tasks

1. Assign the discount list you just created to a pricing strategy. You can use the pricing strategy you created earlier or an existing pricing strategy.
2. On your discount list, create an attribute-based discount based on the pricing segment. Ensure that you have added the conditions columns for the Matrix Class = Pricing Term Adjustment.

Demo for Lesson 9: Pricing Orders: Shipping Charge Lists

Demo 9-1: Reviewing a Shipping Charge List

Overview

You are a pricing administrator responsible for reviewing the corporate-level shipping rules for Vision Corporation. As part of the annual pricing review, you will review the details of the corporate shipping charge list to determine whether you need to make any changes to item AS46336. This demo shows how to review and manage a shipping charge list.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Pricing Administration Overview Page
- Review and Manage a Shipping Charge List

Tasks

Navigate to the Pricing Administration Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Pricing Administration**.

Review and Manage a Shipping Charge List

2. On the **Overview** page of the Pricing Administration work area, click the **Tasks** panel tab, and select **Manage Shipping Charge Lists**.
3. On this page, you can search for existing shipping charge lists and manage them.
4. On the **Manage Shipping Charge Lists** page, in the **Name** field, enter: `Corporate Shipping Charge List`.
   Note: This is the shipping charge list associated with the corporate pricing strategy and order from the Order-to-Cash Overview demonstration.
5. Click **Search**.
6. In the **Search Results**, click the **Corporate Shipping Charge List** link.
7. On the **Edit Shipping Charge List: Corporate Shipping Charge List** page, discuss the following:
   - You can use the page to review and edit the pricing rules defined for the shipping charge list.
   - The page includes the following sections and tabs: **Shipping Charge List** header, **Shipping Charges, Access Sets**, and **Pricing Strategy References**.
8. Click the **Shipping Charges** tab.
9. Click the **Items** subtab.

10. In the **Items** subtab, click the **Actions** menu, and then select **Create Item Charge**.
11. In the **Create Item Charge** dialog box, enter the following:

Field	Value
Shipping Method	Select DHL-Air-Next day air and UPS-Parcel-UPS-ground
Pricing Charge Definition	Handling
Line Type	Buy

12. In the **Items** section, click the **Actions** menu and then select **Add Row**. Enter the following:

Field	Value
Name	AS46336
Pricing UOM	Ea

13. In the **Charge Details** section, enter the following:

Field	Value
Start Date	Current effective date
End Date	
Calculation Method	Price
Base Price	100 USD

14. Click **OK**. On the **Edit Shipping Charge List** page, new rows appear for item AS46336:
    - Shipping method: DHL-Air-Next day
    - Shipping method: UPS-Parcel-UPS-ground
15. Explain that the details for the rows are the same except for the shipping method.
16. In the row for DHL-Air-Next day, in the **Base Price** field, change the value to **50** USD.
17. Click the **Access Sets** tab. View the COMMON set code. Explain that an **Access Set** is the set of business units for the given access set that control runtime execution access to the shipping charge list.
18. Click the **Pricing Strategy References** tab. Note Corporate Pricing Strategy.
19. You can conclude the following from this setup:

    The handling charge for item AS46336 is 50 USD for standard delivery for item AS46336 when the shipping method is DHL-Air-Next day. The handling charge for item AS46336 is 100 USD when the shipping method is UPS-Parcel-UPS-ground.

Demo Complete

You have reviewed and managed a shipping charge list.

Additional Demo Option

Add a shipping charge for a configured item. Repeat steps 8-13, and select item AT6751000. Note that the rule is defined for the root model only.

Demo for Lesson 10: Pricing Orders: Guidelines

Demo 10-1: Adding a Pricing Charge Guideline

Overview

This demo shows how to view an existing pricing charge guideline, and add a new one to the same guideline associated with the pricing strategy.

Prerequisites

Pricing strategy with at least one guideline.

User Login

scm00.Instructor

Tasks

Navigate to Pricing Administration

1. From the **Navigator**, select **Order Management**, and then click **Pricing Administration**.
2. In the **Pricing Administration** work area, click the **Tasks** panel tab, and then select **Manage Pricing Strategies**.
3. On the **Manage Pricing Strategies** page, search for the strategy with the name Corporate.
4. Click **Corporate Pricing Strategy**.
5. On the **Edit Pricing Strategy: Corporate Pricing Strategy** page, click the **Guidelines** link (tab).
6. In the **Charge Guidelines** tab, click Pricing Override - 2017.
7. On the **Edit Guideline: Pricing Override – 2017** page, review the Pricing Override -2017 guideline. Review the charge guideline components in the **Charge Guidelines** tab. The Custom Adjustment component must be less than or equal to the component list price with the specified discount amount applied. The level can be item or all item-specific. Indicate against which charge(s) this guideline must be evaluated. For example, there can be three charges for item AS54888 (sale price, recycling fee, and freight charge). Depending on what is selected, the guideline may be evaluated against one, several, or all charges. Therefore, if a custom adjustment is applied only against the sale price charge, then the charge component for the custom adjustment is evaluated.
8. Click **Actions**, and then select **Add Row**.
9. In the **Charge Guideline Components** area, select the following:

Attribute	Value
Component	Invoice Price
Calculation Type	Percent of
Operator	Greater than or equal to
Calculation Component	Net Price Plus Tax

10. Click **Save and Close**.

Demo Complete

You have viewed an existing pricing charge guideline, and added a new one to the same guideline associated with the pricing strategy.

Demo for Lesson 13: Managing Approvals

Demo 13-1: Creating an Approval Rule for Orders Exceeding $1000

Overview

Show how to create an approval rule that requires supervisor approval.

You are an order manager at Vision Corporation. You want to create a rule that requires that any order with a total value of over $1000 be routed to a supervisor.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Manage Order Approval Rules Page
- Write the Approval Rule
- Enable the Start Approval Process for Sales Orders Parameter

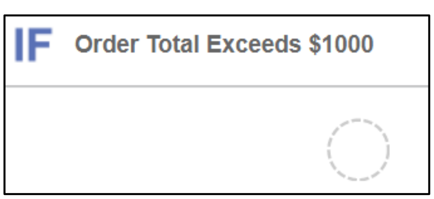
Tasks

Navigate to the Manage Order Approval Rules Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Order Approval Rules** task. Select the task in the **Orders** functional area.

Write the Approval Rule

4. On the **Manage Order Approval Rules** page, click **Create New Rule**.
5. In the field that says **New Rule**, enter: `Approval for Orders Exceeding $1000`. Then click **OK**.
6. Next to **IF**, click **Enter Description**.
7. In the **Enter Description** dialog box, enter: `Order Total Exceeds 1000`. Then click **OK**.
8. Below the description you just entered, click the **New Condition** icon.



9. Enter: `Order Total.` In the **Create Condition** dialog box, select Order Total Amount.

10. Select `>`.
11. Enter: `1000.00`
12. Then click **OK**.
13. Click **THEN,** and then select **DO**.
14. Next to **DO**, click **Enter Description**.
15. In the **Enter Description** dialog box, enter: `Assign to Supervisor`. Then click **OK**.
16. Click the **New Action** icon below the description you just entered. Select **Perform an Action**.

17. In the **Create Action** dialog box, select Assign to Supervisors. Then, verify that the following are selected:
    - Approval Required.
    - Approval Chain based on Task Creator
    - First Approver = Manager
    - Levels of Approvers=1
18. Next to the **Highest Possible Approver** field, click the **Search** icon.
19. In the **Search for Highest Possible** dialog box, in the **First Name** field, enter: `Anna`. In the **Last Name** field, enter: `Holm`. Then click **Search**.
20. Select Anna Holm, and then click **OK**.
21. In the **Create Action** dialog box, click **OK**.
22. On the **Manage Order Approval Rules** page, click **Save and Close**.
23. Click **Close**.

Enable the Start Approval Process for Sales Orders Parameter

24. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
25. In the **Setup and Maintenance** work area, select the **Order Management** offering.
26. Search for the **Manage Order Management Parameters** task. Select the task in the **Orders** functional area.
27. On the **Manage Order Management Parameters** page, on the **General** tab, select the parameter called Start Approval Process for Sales Orders.
28. In the **Start Approval Process for Sales Orders: Values** area, add the Legacy System 1 source order system and select **Yes** to start the approval process for sales orders.

29. If a warning appears asking if you want to continue, click **Yes**.
30. Click **Save and Close**.

Demo Complete

You have written an approval rule and enabled the parameter that allows the rule to be triggered.

Practice for Lesson 13: Managing Approvals

Practice 13-1: Creating an Approval Rule for Orders Exceeding $5000

Overview

You're an order manager at Vision Corporation. You want to create a rule that requires that any order with a total value of over $5000 is routed to a supervisor. You use the Visual Information Builder.

Prerequisites

None

User Login

scmXX.Student

Summary of Tasks

- Navigate to the Manage Order Approval Rules Page
- Create the Approval Rule
- Enable the Start Approval Process for Sales Orders Parameter

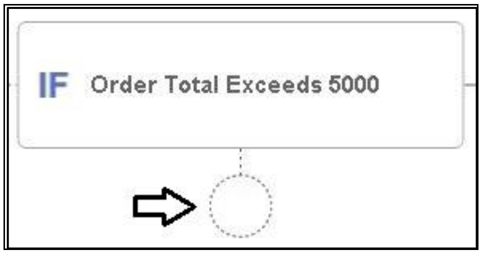
Tasks

Navigate to the Manage Order Approval Rules Page

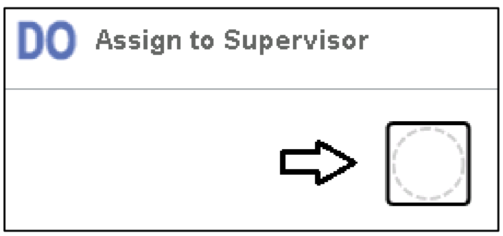
1. From the **Navigator**, select **Others,** and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Order Approval Rules** task. Select the task in the **Orders** functional area.

Create the Approval Rule

4. On the **Manage Order Approval Rules** page, click **Create New Rule**.
5. Click **New Rule**.
6. In the **Enter Rule Name** dialog box, enter: `Approval for Orders Exceeding $5000_XX`. Then click **OK**.
7. Click the **Enter Description** field directly below the rule name. Enter: `Approval for Orders Exceeding $5000 XX`. Then click **OK**.
8. Next to **IF**, click **Enter Description**.
9. In the **Enter Description** dialog box, enter: `Order Total Exceeds 5000`. Then click **OK**.
10. On the **Manage Order Approval Rules** page, click the **New Condition** icon below the condition description you just entered.



11. In the **Create Condition** dialog box, enter: `Order Total.` Select Order Total Amount.
12. Select >.
13. Enter: `5000.00`.
14. Then click **OK**.
15. Click **THEN,** and then select **DO**.
16. Next to **DO**, click **Enter Description**.
17. In the **Enter Description** dialog box, enter: `Assign to Supervisor`. Then click **OK**.
18. Click the **New Action** icon below the description you just entered. Select **Perform an Action**.



19. In the **Create Action** dialog box, select Assign to Supervisors. Then, check that these options are selected:
    - Approval Required.
    - Approval Chain based on Task Creator
    - First Approver = Manager
    - Levels of Approvers=1
20. Next to the **Highest Possible Approver** field, click the **Search** icon.
21. In the **Search for Highest Possible** dialog box, in the **First Name** field, enter: `David`. In the **Last Name** field, enter: `Gomez`. Then click **Search**.
22. Select David Gomez, and then click **OK**.
23. In the **Create Action** dialog box, click **OK**.
24. On the **Manage Order Approval Rules** page, click **Save and Close**.

Enable the Start Approval Process for Sales Orders Parameter

25. From the **Navigator**, select **Others**, and then click **Setup and Management**.
26. In the **Setup and Maintenance** work area, select the Order Management offering.
27. Search for the **Manage Order Management Parameters** task. Select the task in the **Orders** functional area.

28. On the **Manage Order Management Parameters** page, on the **General** tab, select the parameter called Start Approval Process for Sales Orders.
29. In the **Start Approval Process for Sales Orders: Values** area, add the Legacy System 1 source order system and select **Yes** to start the approval process for sales orders.
30. Click **Save and Close**.

Practice Complete

You wrote an approval rule and enabled the parameter that allows the rule to be triggered.

Demos for Lesson 14: Managing Processing Constraints

Demo 14-1: Creating a Constraint Entity

Overview

This is the process of creating a process task entity so that it can be used later to create a processing constraint. When used in a processing constraint, this is the entity that is constrained.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Manage Constraint Entities Page
- Create a Constraint Entity

Tasks

Navigate to the Manage Constraint Entities Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Constraint Entities** task. Select the task in the **Orders** functional area.

Create a Constraint Entity

4. On the **Manage Constraint Entities** page, click the **Create** icon.
5. In the **Entity Name** field, enter: `Create Ship Goods Service`. It will convert to all uppercase letters automatically.
6. In the **Display Name** field, enter: `Create Ship Goods Service`.
7. In the **Description** field, enter: `Create Ship Goods service entity`.
8. In the **Service** list, select **Create Shipping**. Don't select a process name or task name.
9. In the **Process Name** list, select ShipOrderProcess.
10. In the **Task** list, select Ship.
11. Click **Save and Close**.
12. On the **Manage Constraint Entities** page, click **Save and Close**.

Demo Complete

You created a constraint entity.

Demo 14-2: Enabling Additional Attributes for a View Entity

Overview

This is the process of enabling attributes, such as flexfields, for a view entity so that they can be used later to create a processing constraint. When used in a processing constraint, this is the entity that will be constrained.

Prerequisites

None

User Login

scm00.Instructor

Summary of Steps

- Navigate to the Manage Constraint Entities Page
- Enable Additional Attributes

Tasks

Navigate to the Manage Constraint Entities Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Constraint Entities** task. Select the task in the **Orders** functional area.

Enable Additional Attributes

4. On the **Manage Constraint Entities** page, select **View Entity** in the **Entity Type** list and then click **Search**.
5. Select View Entity Name DOO_ORDER_FLINES_V, if it's not already selected.
6. In the **Entity Order Fulfillment Line: Attribute Details** region, select the row for Attribute Name: Required Fulfillment Date. Then, click the **Constraint Enabled** check box.
7. Select and enable additional attributes of your choice in the same manner. Click **Save and Close**.

Demo Complete

You enabled additional attributes for a view entity.

Practices for Lesson 14: Managing Processing Constraints

Practice 14-1: Creating a Processing Constraint

Overview

You're an order administrator at Vision Corporation. You want to prevent changes to order quantity when the fulfillment line gets to the shipping stage because changes at that time are costly and impractical. You create a processing constraint that rejects any changes to quantity after the orchestration process has sent fulfillment lines to the shipping system.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage Processing Constraints Page
- Create a Record Set
- Create a Validation Rule Set
- Create a Processing Constraint
- Create Constraint Conditions

Tasks

Navigate to the Manage Processing Constraints Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Processing Constraints** task. Select the task in the **Orders** functional area.

Create a Record Set

A record set designates which lines to evaluate.

4. On the **Manage Processing Constraints** page, click the **Record Sets** tab.
5. Click **Actions**, and then select **Add Row**.

6. In the new row, enter:

Field	Value
Name	Fulfillment Lines That Belong to Same Line XX
Description	A record set created on fulfillment lines that belong to the same orchestration order line. The lines are grouped together for processing constraint validation.
Short Name	FLSLXX
Entity	Order Fulfillment Line

7. In the **Fulfillment Lines That Belong to Same Line XX: Attributes** area, click **Actions**, and then select **Add Row**.
8. In **Attribute Name**, select Order line ID.
9. Click **Save**.

Create a Validation Rule Set

A validation rule set limits validation to lines that meet certain conditions.

10. Select the **Validation Rule Sets** tab.

Create Rule Set 1

11. Click **Actions**, and then select **Add Row**.
12. In the new row, enter:

Field	Value
Name	Shipping VRS XX
Description	Validation rule set for lines with status Awaiting Shipping.
Short Name	SHIPXX
Validation Type	Table
Entity	Order Fulfillment Line

13. Click **Save**.
14. In the **ShippingVRS XX: Details** area, click **Actions**, and then select **Add Row**.
15. In the new row, enter:

Field	Value
Attribute Name	Status
Validation Operation	Equal To
Value String	Awaiting Shipping

16. Click **Save**.

Create Rule Set 2

17. In the **Validation Rule Sets** tab, click **Actions**, and then select **Add Row**.

18. In the new row, enter:

Field	Value
Name	PICKED VRS XX
Description	Validation rule set for lines with status Picked.
Short Name	PICKEDXX
Validation Type	Table
Entity	Order Fulfillment Line

19. Click **Save**.
20. In the **PICKED VRS XX: Details** region, click **Actions**, and then select **Add Row**.
21. In the new row, enter:

Field	Value
Attribute Name	Status
Validation Operation	Equal To
Value String	Picked

22. Click **Save**.
23. Click **Generate Packages**. Make sure you don't miss this step! This action creates the business objects you created so far. After you generate packages, you'll be able to select these business objects.
24. In the **Confirmation** dialog box, click **OK**.

Create a Processing Constraint

Now that you've created a validation rule set and a record set, you can create the processing constraint.

25. Click the **Constraints** tab.
26. Click **Actions**, and then select **Add Row**. You might need to scroll up to see the new row.
27. In the new row, enter:

Field	Value
Constraint Name	SHIPPING_CONSTRAINT_XX
Display Name	Shipping Constraint XX
Constraint Entity	Order Fulfillment Line
Constrained Operation	Update
Attribute Name	Ordered Quantity

28. Click **Save**.

Set Constraint Conditions

29. In the **Shipping Constraint XX: Details** area, click **Actions**, and then select **Add Row**.
30. In the new row, enter:

Field	Value
Group Number	10
Validation Entity	Order Fulfillment Line
Validation Rule Set	Shipping VRS XX
Record Set	Fulfillment Lines That Belong to Same Line XX
Message	The fulfillment line wasn't updated because it's in the Awaiting Shipping status.

    Did you find your validation rule set and record set? They're available because you generated packages earlier in this practice. If you don't see them, you missed this step! Make sure you go back and generate packages because you'll also need to select PICK VRS XX soon.

31. Click **Save**.
32. In the **Conditions** tab of the **Shipping Constraint XX**: **Details** area, click **Actions**, and then select **Add Row**.
33. In the new row, enter:

Field	Value
Group Number	20
Validation Entity	Order Fulfillment Line
Validation Rule Set	PICKED VRS XX
Record Set	Fulfillment Lines That Belong to Same Line XX
Message	The fulfillment line wasn't updated because it's in the Picked status.

34. Click **Save**.
35. Click the **Applicable Roles** tabs, and then verify that the **All Roles** option is selected. Alternatively, you can opt to limit this privilege to a specific role, such as a manager.
36. At the top of the page, in the row that contains your constraint name, SHIPPING_CONSTRAINT_XX, select the **Enabled** check box if it isn't selected already.
37. Click **Save and Close**.

Practice Complete

You've created a processing constraint.

Practice 14-2: Creating a Revision with a Constraint

Overview

You're an order manager at Vision Corporation. You want to test the constraint that was added to prevent changes to orders when the orchestration process gets to the shipping stage because changes at this time are costly and impractical.

Prerequisites

Practice 14-1

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Create a New Order
- Create Revision with the Constraint in Place
- Disable Constraint
- Edit Revision without the Constraint

Tasks

Create a New Order

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.
2. On the **Overview** page, click **Create Order**.
3. On the header, enter:

Field	Value
Business Unit	US1 Business Unit
Customer	Computer Service and Rentals
Bill-to Customer	Computer Service and Rentals
Purchase Order	XX

4. Click **Save**.
5. In **Select Item**, enter: `AS6647331`. Press the Tab key on your keyboard, and then wait a moment for Order Management to display the item.
6. Click **Add**.
7. On the **Shipment Details** tab, click the **Supply** link and then select Warehouse 003.
8. Click **Submit**.
9. Write down the sales order number that appears in the **Confirmation** dialog box. Then click **OK**.

10. Click **Refresh** periodically until the **Status** column says Awaiting Shipping.

Create Revision with the Constraint in Place

11. In the **Actions** menu at the top of the page, select **Create Revision**.
12. In the **Order Lines** area, change the quantity, then tab out of the field or click anywhere on the screen. This prompts Order Management to check for the constraint you added in the last exercise. After a moment, an Error appears, explaining that the action failed because of a processing constraint.
13. Notice that the quantity you entered reverted to the original quantity. Click **OK**.
14. Click the page-level **Actions** menu, and then select **Discard Draft**.
15. In the **Warning** message, click **Yes**.
16. On the **Order** page, click **Done**.

Disable Constraint

17. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
18. In the **Setup and Maintenance** work area, select the **Order Management** offering.
19. Search for the **Manage Processing Constraints** task. Select the task in the **Orders** functional area.
20. On the **Manage Processing Constraints** page, locate SHIPPING_CONSTRAINT_XX in the list of constraints. Clear the **Enabled** check box. You might need to wait a moment to ensure the system doesn’t reactivate it. Clear the check box before you continue.

    Note: Leave this constraint disabled after you finish this practice to make sure your constraint doesn’t affect other practices.
21. Click **Save**.
22. Click **Generate Packages**.
23. In the **Confirmation** dialog box, click **OK**.

Create Revision without the Constraint

24. From the **Navigator**, select **Order Management**, and then click **Order Management**.
25. In the **Search** field, enter your sales order number, and then click **Search**.
26. On the **Order** page, click the **Actions** menu, and then select **Create Revision**.
27. Change the quantity, and then click elsewhere on the page. Wait a few moments for Order Management to process the update. Was your change accepted? Does the blue dot appear next to the line?
28. Click **Save**. The blue dot disappears.
29. Click **Submit**.
30. In the **Confirmation** dialog box, click **OK**.
31. Click **Done** to return to the **Order Management Overview** page.

Practice Complete

You tested your processing constraint.

Practice for Lesson 15: Assigning Orchestration Processes

Practice 15-1: Creating an Orchestration Process Assignment Rule Using the Visual Information Builder

Overview

In this practice, you create an orchestration process assignment rule that automatically assigns a specific orchestration process to an order based on a specified attribute.

In this scenario, you want to assign the ShipOrderGenericProcess to all orders that have item AS86004.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage Orchestration Process Assignment Rules Page
- Create a New Rule

Tasks

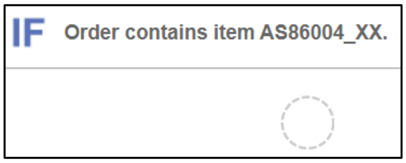
Navigate to the Manage Orchestration Process Assignment Rules Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Process Assignment Rules for Sales Orders** task. Select the task in the **Orders** functional area.

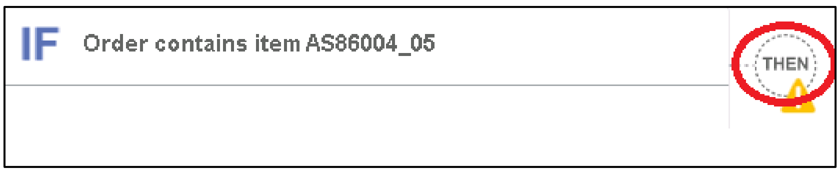
Create a New Rule

4. On the **Manage Orchestration Process Assignment Rules** page, click **Create New Rule**.
5. In the field at the top of the page, replace New Rule with: `Assign ShipOrderGenericProcess to Orders with Item AS86004_XX`. Then click **OK**.
6. Click the **Enter Description** text next to IF and enter: `Order contains item AS86004_XX`. Note: If you're unable to enter information in the Visual Information Builder, then clear the browser cache and try the action again.
7. Click **OK**.

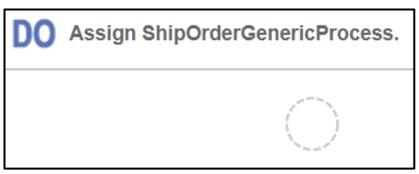
8. Click the **New Condition** icon below the description you just entered. The following screenshot shows the circular **New Condition** icon below the **If** statement.



9. In the **Create Condition** dialog box, begin entering: `Item`. Select: Item (AssignLaunchRules.Order Fulfill Line).
10. Select: =
11. Click the **Search** icon. In the **Item** field of the **Search** dialog box, enter: `AS86004`. Click **Search**. When the value appears, select it and then click **OK**.
12. Click **OK** to close the **Create Condition** dialog box.
13. Click the **Then** icon and select **DO**.



14. In the **Description** field, enter: `Assign ShipOrderGenericProcess`. Then click **OK**.
15. Click the **New Action** icon. This screenshot shows the circular **New Action** icon below the If statement.



16. In the **Create Action** dialog box, begin entering: `Process`. From the list of options that appear, select Process Name (AssignLaunchRules.Order Fulfill Line).
17. Make sure the next field reads: "is set to"
18. In the field below "is set to", search for and select ShipOrderGenericProcess. Then click **OK**.
19. On the **Create Action** dialog box, click **OK**.
20. Click **Save and Close**.

Practice Complete

You've created an orchestration process assignment rule that assigns a specific orchestration process to an order, based on the item number.

Demos for Lesson 16: Defining Orchestration Processes

Demo 16-1: Defining Orchestration Processes

Overview

This demonstration shows how to create an orchestration process definition, having a branching condition that determines whether to execute a branch from the parent process.

In this scenario, the order administrator of a flooring company wants an orchestration process for carpet orders. The company has a policy requiring a representative call a customer before sending an invoice of over $50,000.00.

> **Note:** The following is an example of a simple rule, which is well suited for rules for an orchestration process with a single line. If you want to write a rule for an orchestration process that has multiple lines, then use advanced mode rules. For more information, see Oracle Fusion Middleware User's Guide for Oracle Business Rules.

> **Note:** You can save time scrolling by using the following tabs. Each of the hyperlinks takes you to a group of options for the orchestration process definition. The following screenshot shows the groups: Steps, Dependencies, Planning, Change Management, and Additional Information.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Manage Orchestration Process Definitions Page
- Create the Orchestration Process Definition Header
- Create the Orchestration Process Definition Steps
    - Create the Otherwise Branch
    - Create the Wait for Invoice Step of the Otherwise Branch
- Create the Merge Step
- Create the Branching Conditions: Create the If Statement

Tasks

Navigate to the Manage Orchestration Process Definitions Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.

2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Orchestration Process Definitions** task. Select the task in the **Orders** functional area.

Create the Orchestration Process Definition Header

4. On the **Manage Orchestration Process Definitions** page, in the Search Results region, click the **Create** icon.
5. On the **Create Orchestration Process Definitions** page, in the **Name** field, append `PhoneCustomerWhenLargeInvoice` (without any spaces) to the end of CustomDOO_.
6. Enter `Process definition with a branch for invoices of over $50,000` in the **Description** field.
7. Enter `Phone Customer` in the **Process Display Name** field.
8. Select `Ship Order Class` in the **Process Class** field.
9. Select `Common Set` in the **Set List** field.
10. Click **Save**.

Create the Orchestration Process Definition Steps

11. On the **Step Definition** tab, click the **Add Row** icon. Each time you add a new step, place the cursor in the previous step. For example, when you want to create step 200, place the cursor in one of the fields of step 100. Then click **Add Row**.

Step	Step Name	Step Type	Task Type	Task List	Service Name	Additional Selections
100	Schedule Product	Service	Schedule	Schedule	Create Scheduling	
200	Reserve Product	Service	Reservation	Reserve	Create Inventory Reservation	
300	Ship Product	Service	Shipment	Ship	Create Shipping	
400	Wait for Product Shipment	Service	Shipment	Ship	Wait for Shipment	In Exit Criteria, select Shipped. Select the Fulfillment Completion Step check box.
500	Conditional Node	Conditional				

Step	Step Name	Step Type	Task Type	Task List	Service Name	Additional Selections
600	Phone Customer	Service	Activity	Activity	Create Activity	In Evaluation Sequence, enter 1.
700	Wait for Phone Customer	Service	Activity	Activity	Wait for Activity	In Exit Criteria, select Completed.
800	Create Invoice	Service	Invoice	Invoice	Create Billing Lines	
900	Wait for Invoice	Service	Invoice	Invoice	Wait for Billing	In Exit Criteria, select Billed.

Note: You must create a wait step for all steps except the schedule and reservation steps. Wait steps are not needed for these steps because only a single response to the request is expected. Wait steps must have the same task name as their corresponding initiating step.

Steps 600 through 900 are part of the conditional branch.

Create the Otherwise Branch

Note: This branch is executed if the conditions of the other branch aren't met.

12. Click the cursor in the **Conditional** node (step 500), then click the Add Row icon.
13. Next to **Step 600**, in the **Step Name** field, enter: `Otherwise Step Create Invoice`.
14. In the **Step Type** list, select Service.
15. In the **Task Type** list, select Invoice.
16. In the **Task** list, select Otherwise Create Invoice. If this option is not available, perform the following steps:
    a. In the **Task** list, click **Create**.
    b. In the **Create Task Name** dialog box, in the **Code** field, enter: `OtherwiseCreateInvoice`.
    c. In the **Create Task Name** dialog box, in the **Name** field, enter: `Otherwise Create Invoice`.
    d. In the **Display Name** field, enter a shorter value: `Else Create Invoice`.
    e. In the **Task Type** list, select Invoice.
    f. Click the **Save and Close** button.
17. In the **Service Name** list, select Create Billing Lines.
18. In the **Evaluation Sequence** field, enter: `2`.
19. Select the **Otherwise** check box.
20. Select the **Planning Default Branch** check box.

Create the Wait for Invoice Step of the Otherwise Branch

21. Click the cursor in the **Otherwise Step Create Invoice** step (step 600), then click the **Add Row** icon.
22. Next to **Step 700**, in the **Step Name** field, enter: `Otherwise Wait for Large Invoice`.
23. In the **Step Type** list, select Service.
24. In the **Task Type** list, select the Invoice task type.
25. In the **Task** list, select Otherwise Create Invoice.
26. In the **Service Name** list, select Wait for Billing.
27. In the **Exit Criteria** list, select Billed.

Create the Merge Step

Note: After the steps for one or more of the above branches are executed, a single set of orchestration process steps remains.

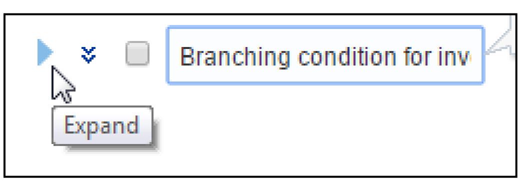
28. Click the cursor on the **Wait for Invoice** step (step 1100), then click the **Add Row** icon.
29. Next to **Step 1200**, in the **Step Name** field, enter: `Merge`.
30. In the **Step Type** list, select Merge.
31. Click **Save**.

Create the Branching Conditions: Create the If Statement

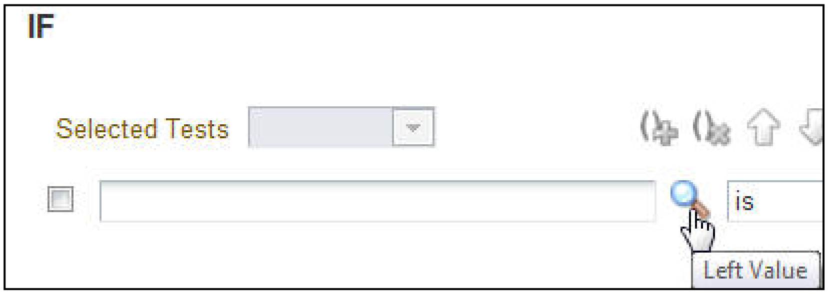
Note: Create a rule on the invoicing step of the orchestration process definition. To create the rule, you must construct If and Then statements.

32. Click the cursor in the **Phone Customer** step (step 800).
33. In the **Branching Condition** column, select Click for Rule.
34. In the **Branching Condition Rules** dialog box, click the **Add** list arrow, and select **Add Rule**. The following screenshot depicts the **Add** arrow and the **Add Rule** value.

35. In the **Rule Name** field, overwrite Rule 1 and enter: `Branching condition for invoice greater than 50K`. The following screenshot depicts the **Expand** icon.
36. Click the **Expand** icon.



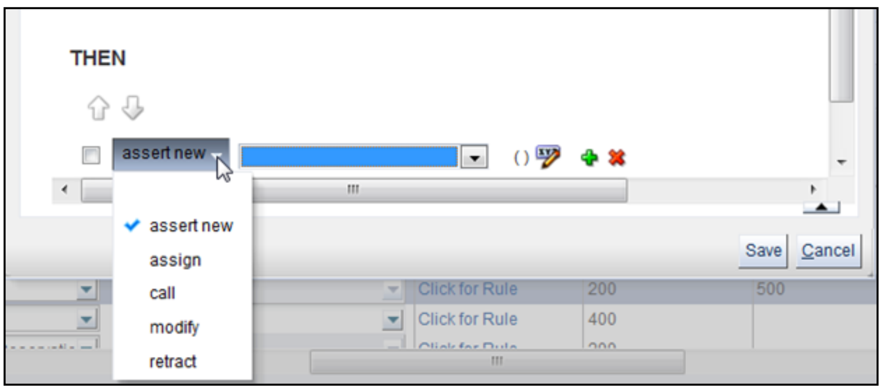
37. In the **IF** section, click the **Left Value** icon. The following screenshot depicts the location of the Left Value icon, which is next to a blank field below “IF.”



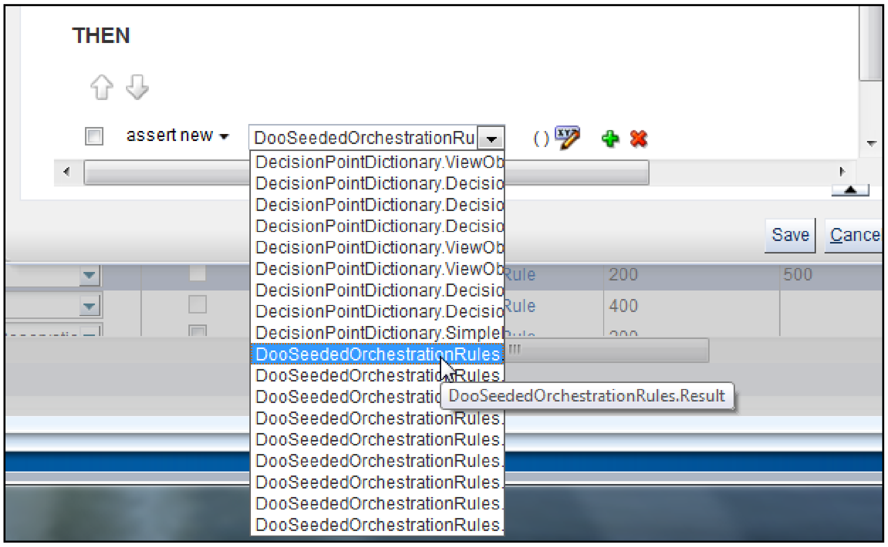
38. In the **Condition Browser,** expand DooSeededOrchestrationRules and then DOOFLine.
39. Select extendedAmount.
40. Click the **OK** button to close the **Condition Browser**.
41. Next to the value that you just selected, select more than.
42. In the field to the right, enter: `50000`. Don’t insert a comma.

Create the Then Statement

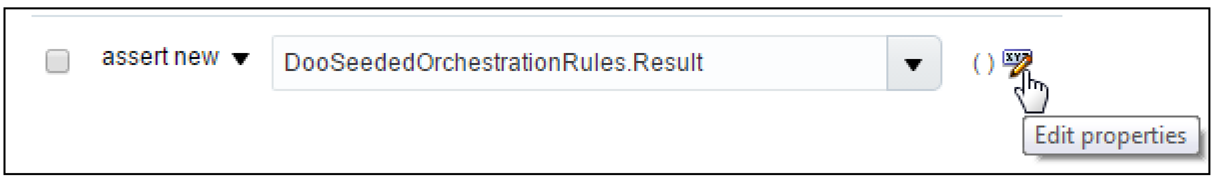
43. In the **THEN** section, click the **Add Action** list arrow, and select assert new. The following screenshot depicts the **Action** list and the list of values, including assert new.



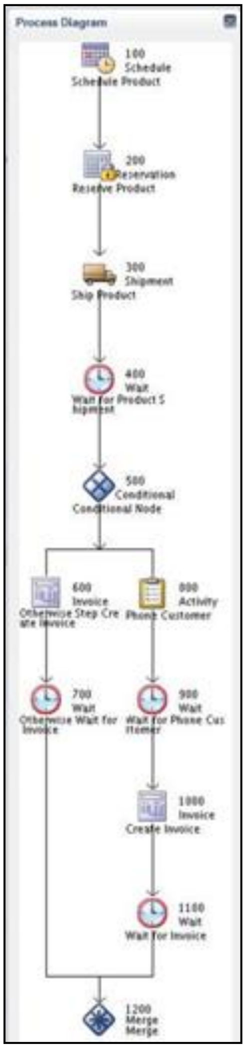
44. In the next field to the right, select DooSeededOrchestrationRules.Result. The following screenshot depicts the list of values, including DooSeededOrchestrationRules.Result.



45. Click the **Edit Properties** icon. The following screenshot depicts **the Edit Properties** icon, which is to the right of DooSeededOrchestrationRules.Result.



46. In the **Properties** dialog box, next to the **Value** field for resultObj, enter: `DooSeededOrchestrationRules.Boolean.true`.
47. In the **Value** field next to resultObjKey, enter: `"1"`. Be sure to use quotation marks.
48. In the **Properties** dialog box, click the **OK** button.
49. In the **Branching Condition Rules** dialog box, click **Save**.
50. On the **Edit Orchestration Process Definition**, click **Save and Close**. The following screenshot depicts the steps of the orchestration process you just created.



Optional. If you validate the orchestration process definition, then errors related to status and planning appear. The errors occur because status and planning aren't set up yet. They are set up in later lessons.

Demo Complete

You have created, and viewed a process diagram for, an orchestration process definition having a branching condition that determines whether to execute a branch from the parent process.

Demo 16-2: Creating Pause Task Rules

Overview

This demonstration shows how to create the rules that release and create the conditions to pause a process.

In this scenario, you are an order administrator at Vision Corporation. You want to create a rule that causes the orchestration process to pause at runtime before invoicing, until all of the order lines are shipped. This pause rule allows all the lines to be sent to accounts receivable at the same time.

Prerequisites

None

User Login

scm00.instructor

Summary of Tasks

- Navigate to the Manage Orchestration Process Definitions Page
- Insert the Pause Step
- Create the Rule
- Create the If Statement: Default Is to Release the Process
- Create the Then Statement: Then Release the Pause
- Create the Pause Rule

Tasks

Navigate to the Manage Orchestration Process Definitions Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Orchestration Process Definitions** task. Select the task in the **Orders** functional area.

Duplicate the Orchestration Process Definition

4. On the **Manage Orchestration Process Definitions** page, enter `DOO` in the **Process Name** field. Then click **Search**.
5. In the **Search Results,** locate DOO_OrderFulfillmentGenericProcess and select it.
6. Click the **Duplicate** icon.
7. In the **Process Name** field for the header, enter: `StandardOrdersProcessXX`.
8. In the **Process Display Name** field, enter: `Orchestration Process for Standard Orders XX`.

9. In the **Set** list, select Common Set, if it isn't selected already.
10. In the **Process Class** list, select `Drop Shipment and Back-to-Back Order Class` if it isn't selected already.
11. Click **Save**.

Insert the Pause Step

12. On the **Step Definition** tab, click the cursor on the **Merge** step, and then click the **Add Row** icon.
13. In the **Step Name** field, enter: `Pause for Coordination`.
14. In the **Step Type** list, select Service.
15. In the **Task Type** list, select Pause.
16. In the **Task** list, select Create. You will create a new task name because the name "Pause" already was used once within the Pause task type.
17. In the **Create Task Name** dialog box, in the **Code** field, enter: `PauseForCoordinationXX`.
18. In the **Name** field, enter: `Pause for Coordination XX`.
19. In the **Display Name** field, enter: `Pause for Coordination XX`.
20. In the **Task Type** list, select Pause.
21. Click **Save and Close**.
22. In the **Service** list, select Pause Process.
23. Click **Save**.

Create the Rule

24. Scroll to the **Pause Rule** column.
25. On the **Pause Rule** column, **Pause for Coordination** step, select **Click for Rule**.
26. Click the **Add** arrow icon, and then select **Add Rule**. The following screenshot depicts the **Add** arrow and the **Add Rule** value.

27. In the **Rule Name** field, overwrite the text "`Rule 1`" and enter: `ReleasePauseXX`.
28. Click the **Expand** icon.
29. Click the **Collapse Pane** icon near the bottom of the rule editor, to close the **Validation Log** region if it's open.
30. Click the **Show Advanced Settings** icon  , to the left of the rule name.

31. Set the following parameters:

Field	Value
Priority	Highest
Advanced Mode	Select the check box.
Tree Mode	Select the check box.

Create the If Statement: Default Is to Release the Process (Optional Rule)

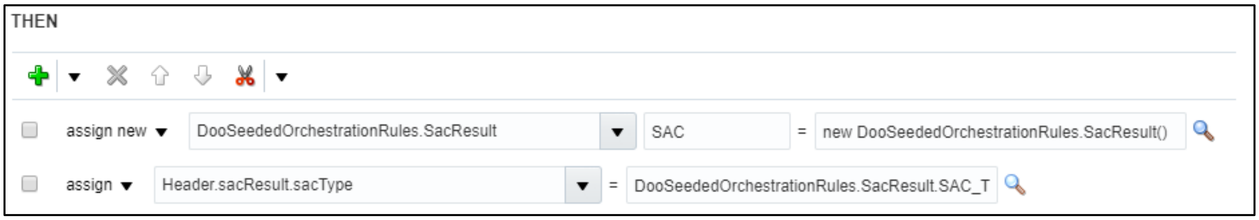
A rule to release the pause isn't required.

32. Select DooSeededOrchestrationRules.DOOHeader in the **Root** list.
33. Under **IF** in the left field that contains DooSeededOrchestrationRules.DOOHeader, overwrite the current text with `Header`.
34. Below where you entered `Header`, next to the **Right Value** icon, click the arrow and then select Delete Test. The following screenshot depicts the arrow next to the **Right Value** icon and the list of values that appears.

Create the Then Statement: Then Release the Pause

35. In the **THEN** region, click the **Add Action** list icon, and select **assign new**.
36. Click the **Select a Target** arrow next to the new field and then select DooSeededOrchestrationRules.SacResult.
37. In the field next to where you selected DooSeededOrchestrationRules.SacResult, enter: `SAC`.
38. Click the **Expression Value** icon.
39. In the **Condition Browser**, expand DooSeededOrchestrationRules and then SacResult.
40. Select new.
41. Click **OK**.
42. In the **THEN** region, click the **Add Action** list icon, and select assign.
43. Select Header.sacResult.sacType.
44. Click the **Expression Value** icon.
45. In the **Condition Browser**, expand DooSeededOrchestrationRules and then SacResult.

46. Select SAC_TYPE_IMMEDIATE.
47. Click **OK** to close the **Condition Browser**.
48. In the **Pause Rule** window, click **Validate**. The following screenshot depicts the Then statement with the actions you created above.



Create the Pause Rule:

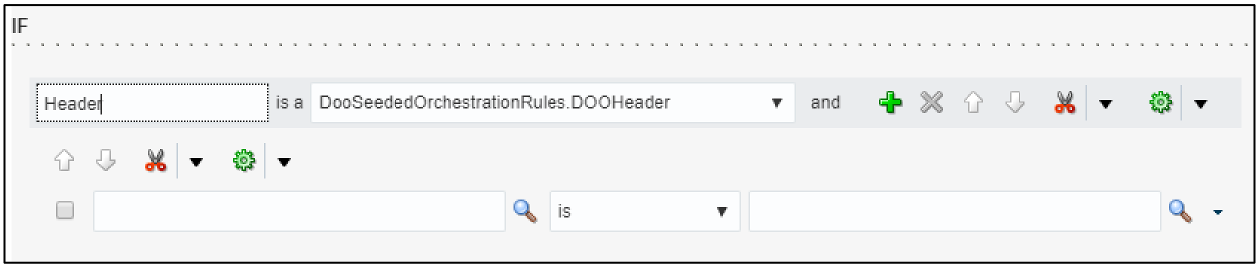
Create the If statement: If the Shipped Quantity is Null for any Order Line

49. Click the **Collapse** icon to the left of rule name ReleasePauseXX at the top of the **Pause Rule** window.
50. Click the **Add** list arrow, and select Add Rule. The following screenshot depicts the **Add** arrow and the **Add Rule** value.

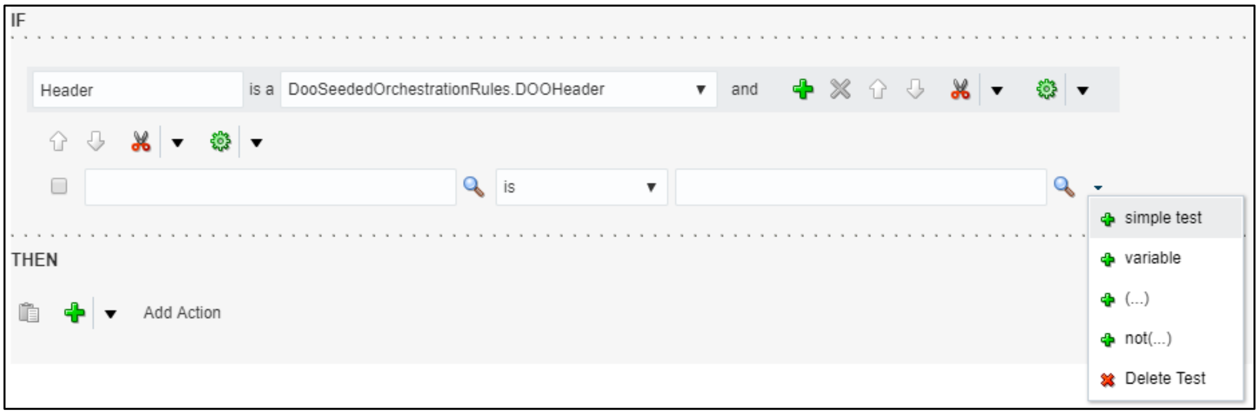
51. In the **Rule Name** field, overwrite the text "`Rule 1`," and enter: `Pause_IfShipQtyNullXX`.
52. Click the **Expand** icon.
53. Next to the **Rule Name**, click the **Show Advanced Settings** icon.
54. Set the following parameters:

Field	Value
Priority	Medium
Advanced	Select the check box.
Tree Mode	Select the check box.

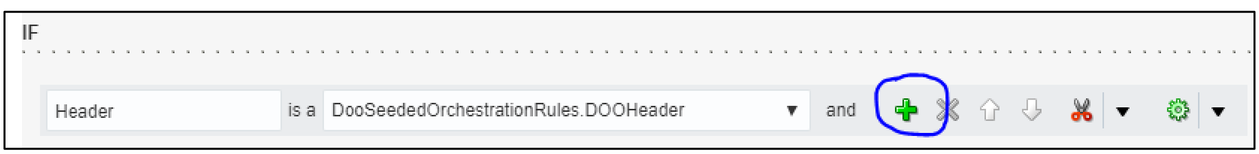
55. In the **Root** list, select DooSeededOrchestrationRules.DOOHeader.
56. In the left field, that contains DooSeededOrchestrationRules.DOOHeader, overwrite the current text and enter: `Header`. The following screenshot depicts the If statement with the first condition, Header is a DOOSeededOrchestrationRules.DOOHeader.



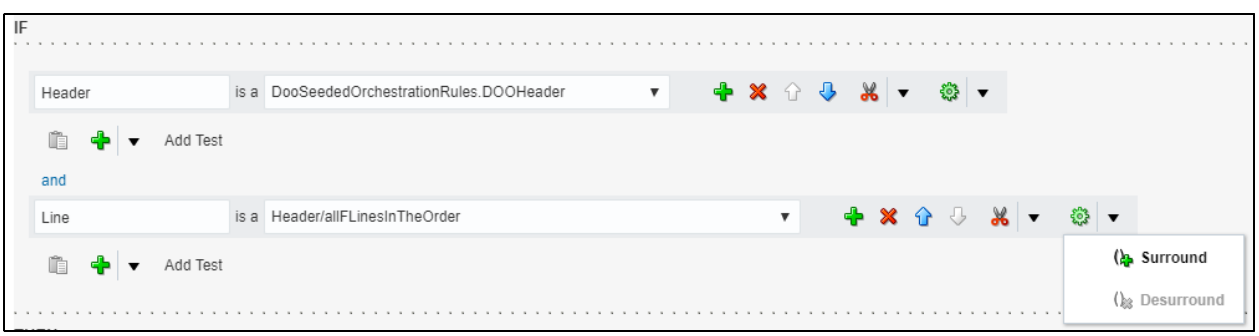
57. Below where you entered `Header`, next to the **Right Value** icon, click the arrow icon and then select Delete Test. The following screenshot depicts the arrow next to the **Right Value** icon and the list of values that appears.



58. To the right of DooSeededOrchestrationRules.DOOHeader, click the **Add Pattern** icon. The following screenshot depicts the location of the **Add Pattern** icon, to the right of DooSeededOrchestrationRules.DOOHeader.

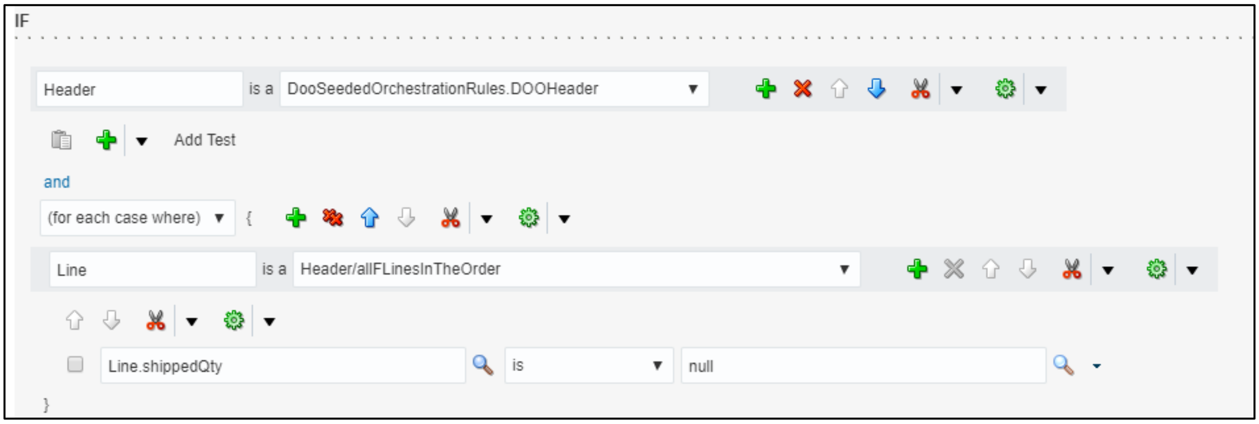


59. To the right of **Is a**, select Header/allFLinesInTheOrder in the list.
60. In the left field directly under **and,** overwrite the current text with: `Line`.
61. To the right of the new pattern, click the **Surround Pattern with Parentheses** icon and then select Surround. The following screenshot depicts the location of the **Surround Pattern with Parentheses** icon, to the right of Header/allFLinesInTheOrder **.**



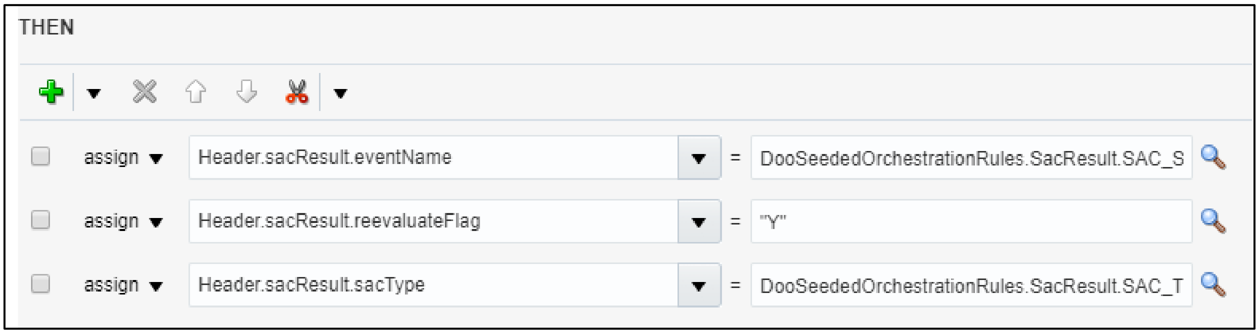
62. Click **Add Test** and then select **simple test**.
63. In the **IF** region, click the **Left Value** icon to search for the left value.

64. In the **Condition Browser**, click expand Line.
65. Select shippedQty.
66. Click **OK**.
67. To the right of the **Left Value** icon, select **Is,** if it's not already selected, in the drop-down list.
68. Click the **Right Value** icon, and then select null.
69. Click **OK**. The following screenshot depicts the full If statement, based on the steps above. It includes Line.shippedQty is null.



Create the Then Statement: Then Pause the Process

70. In the **THEN** region, click the **Add Action** link, and then select assign.
71. Select Header.sacResult.eventName.
72. Click the **Expression Value** icon.
73. In the **Condition Browser**, expand DooSeededOrchestrationRules and then SacResult.
74. Select SAC_SYSTEM_EVENT_IPC_PAUSE.
75. Click **OK**.
76. In the **THEN** region, click the **Add Action** link, and select assign.
77. Select Header.sacResult.reevaluateFlag.
78. Click the **Expression Value** icon.
79. In the **Condition Browser**, enter: `"Y"`. Include the quotation marks.
80. Click **OK**.
81. In the **THEN** region, click the **Add Action** link, and select assign.
82. Select Header.sacResult.sacType.
83. Click the **Expression Value** icon.
84. In the **Condition Browser**, expand DooSeededOrchestrationRules and then SacResult.
85. Select SAC_TYPE_EVENT.
86. Click **OK**. The following screenshot depicts the Then statement with the three actions you added.



87. Click **Validate**.
88. Click **Save**.
89. On the **Edit Orchestration Process Definition** page, click **Save and Close** to save the process definition.

Demo Complete

You have successfully created rules that pause and release the process at runtime based on runtime data.

Practices for Lesson 16: Manage Orchestration Processes

Practice 16-1: Examining an Orchestration Process Definition

Overview

In this practice, you walk through the header and steps of an orchestration process definition (DOO_OrderFulfillmentGenericProcess) and examine the setup. This process is seeded and representative of a typical order fulfillment flow. You see that the process definition contains these steps:

1. Schedule
2. Conditional (beginning of branching)
3. Request Supply (beginning of back-to-back branch)
4. Pause
5. Create Back to Back Shipment Request
6. Wait for Back to Back Shipment Request
7. Create Purchase Request (beginning of drop ship branch)
8. Wait for Procurement
9. Create Reservation (beginning of warehouse shipment branch)
10. Create Shipment Request
11. Wait for Shipment Advice
12. Merge (end of branching)
13. Create Invoice
14. Wait for Invoice

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Navigate to the Manage Orchestration Process Definitions Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Orchestration Process Definitions** task. Select the task in the **Orders** functional area.

Open the Orchestration Process Definition

4. On the **Manage Orchestration Process Definitions** page, in the **Process Name** field, enter: `DOO_Order` Then click the **Search** button. DOO_OrderFulfillmentGenericProcess appears in the **Search Results** area.

5. In the **Search Results** area, click **Actions**, and then select **Edit**.
   Notice that this is a released process, and the view is read-only. You can view the details of the process definition.
6. On the **Edit Orchestration Process Definition** page, in the **Set** list, notice that the Common Set list item is selected.
7. In the **Process Class** list, note that the **Drop Shipment and Back-to-Back Order Class** is selected.
8. In the **Cost of Change Rule** option, click the **Click for Rule** link.
9. In the **Cost of Change Rule** dialog box, click the **Expand** icon for Rule 1.
10. Look at the rule. Notice what conditions must be present for a value to be set for the cost of change.
11. Click **Cancel**.

Examine the Process Steps

12. In the **Process Details** area, on the **Step Definition** tab, use the scroll bar to scroll up, and then click the **Schedule** step.
13. In the **Schedule: Details** area, examine these parameters:

Field	Value
Step Name	Schedule
Step Type	Service
Task Type	Schedule
Task	Schedule
Service	Create Scheduling

14. Repeat the same action for other steps in the process definition. Click each step and look at the values for the fields listed in the table above.
15. Click the **Wait for Back to Back Shipment Advice** step, scroll toward the right, and then examine the value in the **Exit Criteria** column. This is the status that's required for the process to proceed from a wait step to the next step.
16. Repeat the same action for the other wait steps. Click the step, and look at the exit criteria.
17. Click the **Schedule** step.
18. In the **Line Selection Criteria** column, click the **Click for Rule** link.
19. In the **Line Selection Criteria** dialog box, examine the rule. Notice what conditions must be present for a fulfillment line (as represented by fulfillLineId in the result) to be processed by this step.
20. Click **Cancel**.
21. Repeat the same action for other steps where the **Click for Rule** link is active in the **Line Selection Criteria** column. Click each link, and then examine the line selection criteria rules.

22. In the **Process Details** area, click the **Dependencies** link under the **Step Definitions** tab, and then examine the values for **Next Step** and **Previous Step**.
23. On the **Request Supply** step, in the **Branching Condition** column, click the **Click for Rule** link.
24. In the **Branching Condition Rules** dialog box, examine the rule. Notice the conditions that must be present for this branch to become active, as represented by the value Boolean:TRUE in the result.
25. Click **Cancel**.
26. Repeat the same action for other steps that show the **Click for Rule** link. Click the **Expand** icon, and examine the branching condition rules.
27. Examine the **Evaluation Sequence** and **Otherwise** columns under the **Dependencies** column group. Which step takes priority in execution? Which step is run if all branching rules are false?
28. Click **Cancel**.

Practice Complete

You have examined the header, steps, and setup of an orchestration process definition (OrderFulfillmentGenericProcess).

Practice 16-2: Modifying an Orchestration Process Definition

Overview

In this practice, you edit a process header and steps of an orchestration process definition and insert a new step to pause the process at runtime if not all lines are ready for invoicing.

In this scenario, you are an order administrator at Vision Corporation. You want to create a step that causes the fulfillment process to pause at runtime before invoicing, until all the order lines are shipped. This pause allows all the lines to be sent to accounts receivable at the same time.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage Orchestration Process Definitions Page
- Edit the Orchestration Process Definition
- Insert the Pause Step

Tasks

Navigate to the Manage Orchestration Process Definitions Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select **Order Management**.
3. Search for **Manage Orchestration Process Definitions** task. Select the task in the **Orders** area.

Edit the Orchestration Process Definition

4. On the **Manage Orchestration Process Definitions** page, in the **Process Name** field, enter: `OUStandardOrdersProcessXX`

   Note: If your student number is higher than 15, ask your instructor which process you should use. Processes are available for student numbers 1 through 15.
5. Click **Search**. OUStandardOrdersProcessXX appears in the **Search Results**.
6. Click **Actions,** and then select **Edit**.
7. Modify the process name and process display name as follows:
   a. Process Name: `CustomDOO_OUStandardOrdersProcessXX<first letter of last name>`
   b. Process Display Name: `CustomDOO_Standard Order XX<first letter of last name>`

8. In the **Set** list, select Common Set, if it isn't selected already.
9. In the **Process Class** list, select Drop Shipment and Back-to-Back Order Class, if it isn't selected already. If you must modify this class, then click **OK** when the warning message appears.
10. Click **Save**.

Insert the Pause Step

11. In the **Process Details** area, click the **Merge** step, and then click the **Add Row** icon.
12. In the new row, enter:

Field	Value
Step Name	Pause for Coordination
Step Type	Service
Task Type	Pause
Task	a. Click the arrow of the Task list. b. Click **Create**. c. In the **Create Task Name** dialog box, in the **Code** field, enter: `PauseForCoordinationXX` d. In the **Name** field, enter: `Pause for Coordination XX` e. In the **Display Name** field, enter: `Pause for Coordination XX` f. In the **Task Type** list, select Pause. g. Click **Save and Close**.
Service	Pause Process

13. Review your selections, and then click **Save and Close**.

Practice Complete

You've successfully edited an orchestration process definition and inserted a step.

Practice 16-3: Creating Pause Task Rules

Overview

In this practice, you create a rule that causes the orchestration process to pause at runtime, before invoicing, until all the order lines are shipped. This allows Order Management to send all the lines to accounts receivable at the same time. You also create a rule that causes the pause task to release.

> **Note:** The practice is an example of a simple set of pause task rules, which works well for rules for an orchestration process with simple business requirements. If you want to write rules for an orchestration process using more complex business logic, then you can find more information available in the Oracle Fusion Middleware User's Guide for Oracle Business Rules.

Prerequisites

Practice 16-2: Modifying an Orchestration Process Definition

User Login

scmXX.student (XX is the student number assigned to you)

Tasks

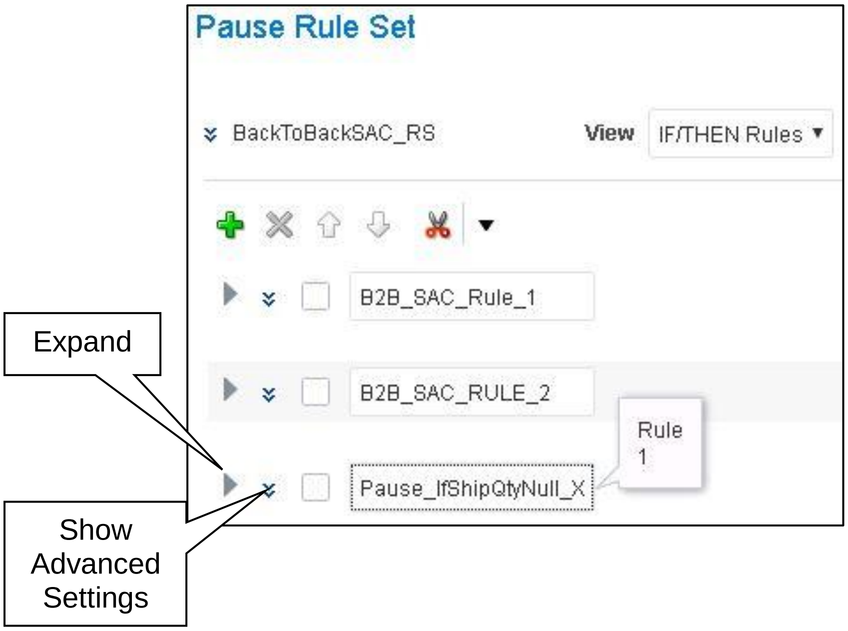
Navigate to the Edit Orchestration Process Definitions Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select **Order Management**.
3. Search for **Manage Orchestration Process Definitions** task. Select the task in the **Orders** area.
4. On the **Manage Orchestration Process Definitions** page, enter your process name from practice 16-2, CustomDOO_OUStandardOrdersProcessXX<first letter of your last name>, in the **Process Name** field and then click the **Search** button.
5. Select the process in the search results, and then click the **Edit** icon.
6. In the **Process Details** area of the **Edit Orchestration Process Definition** page, click the Pause task, step 400.
7. In the **Pause Rule** column, select **Click for Rule**.

Create the Pause Rule:

8. In the **Pause Rule: CustomDOO_OUStandardOrdersProcessXX<initial>** dialog box, click the **Add Rule** icon at the top of the **Pause Rule** dialog box. This screenshot shows the **Add Rule** icon.

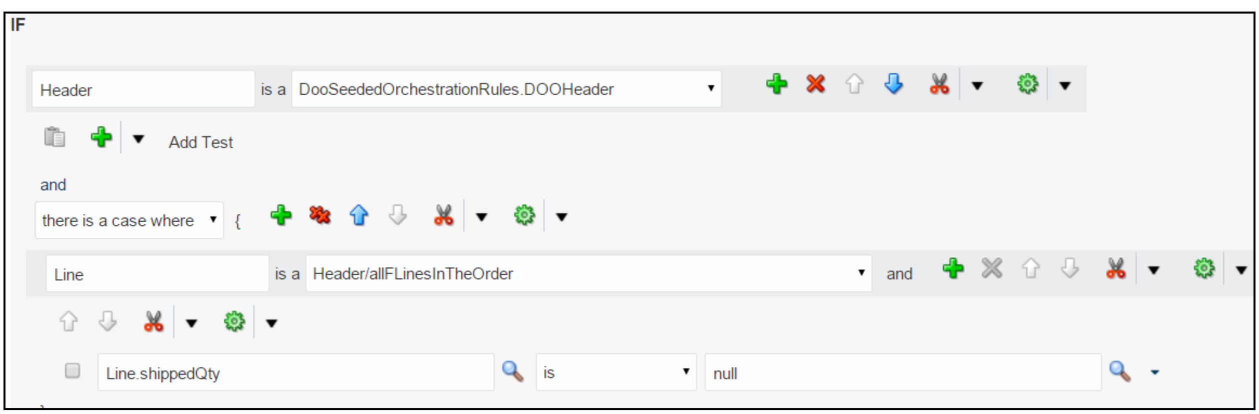
9. Replace the text that begins with Rule 1 with the rule name: `Pause_IfShipQtyNull_XX`



10. If necessary, click the **Expand** icon.
11. If necessary, click the **Show Advanced Settings** arrow next to the rule name.
12. Set these parameters:

Field	Value
Priority	Medium
Advanced Mode	Select the check box
Tree Mode	Select the check box

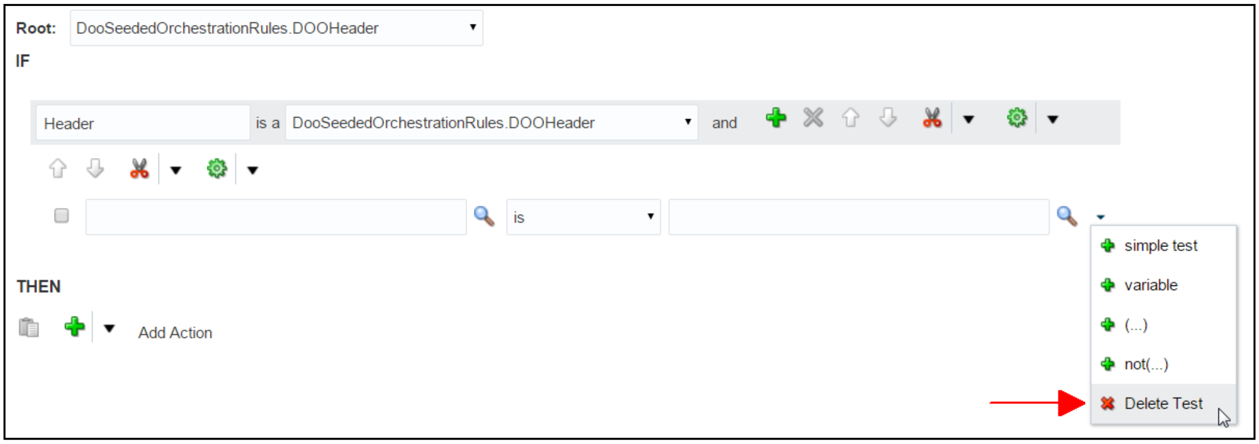
13. Hide the advanced settings, so you can see more of the page.
14. Open the **Root** list and then select the DooSeededOrchestrationRules.DOOHeader list item.



Here’s how to create this statement.

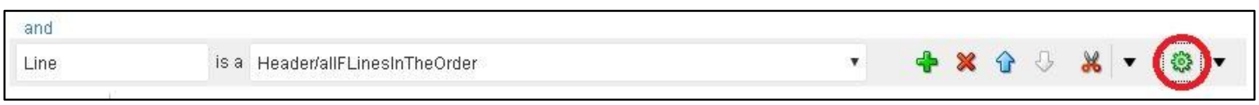
15. Underneath the **IF** label, in the left field that contains `DooSeededOrchestrationRules.DOOHeader`, substitute the current text with `Header`.

16. To the right, below where you entered Header, click the down arrow next to the **Right Value** icon and then select Delete Test. The following screenshot shows the Delete Test option in a list of values that originates from the test line.

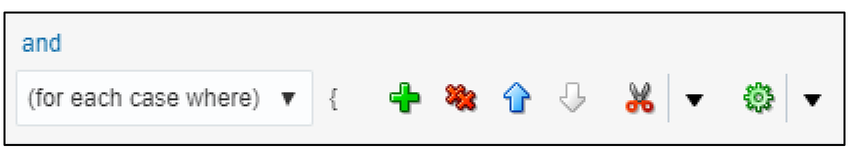


17. To the right of DooSeededOrchestrationRules.DOOHeader, click the **Add Pattern** icon.

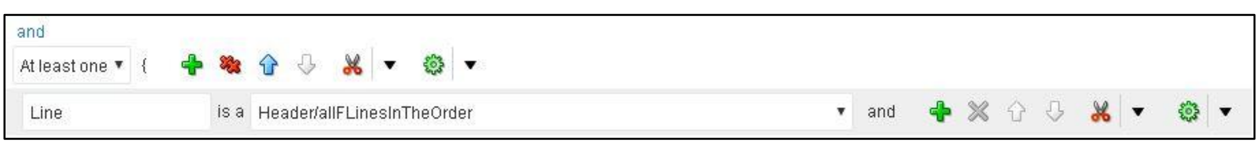
18. Click **Save**.
19. In the first empty field immediately to the left of **Is A,** enter: `Line`.
20. In the list to the right of **Is A**, select Header/allFLinesInTheOrder.
21. To the right of the field that you set to Header/allFLinesInTheOrder, click the down arrow next to the **Surround Pattern With Parentheses** icon and then select Surround. The following screenshot shows the **Surround Pattern With Parentheses** icon on the same line where you entered Line.



The following screenshot shows the text that appears when you click Surround Pattern with Parenthesis. After "and," a field appears that says (for each case where).



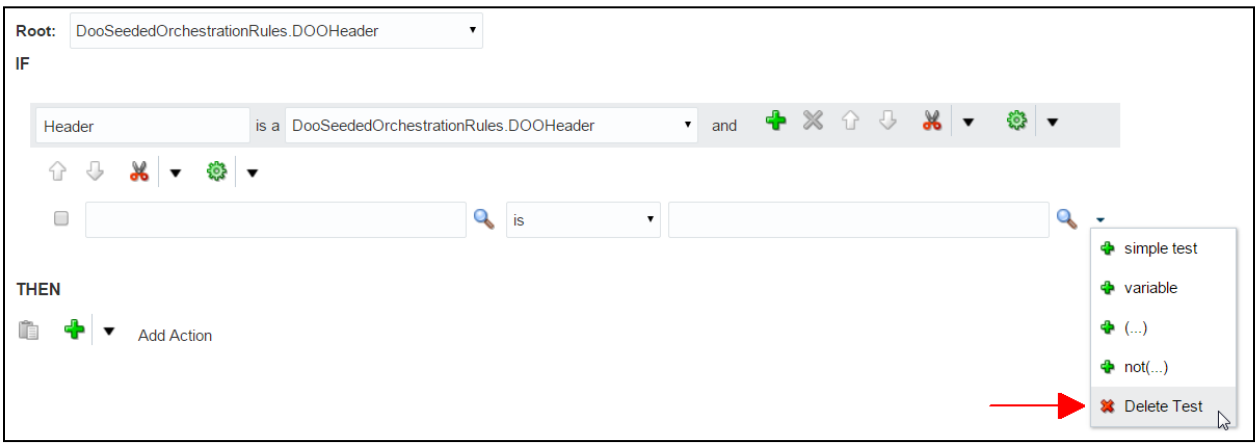
22. In the **Each** list, select "At least one."



23. Directly below the field that contains "Line," click **Add Test** and then select Simple Test.
24. Click the **Left Value** icon shown below.

25. In the **Condition Browser**, expand Line, and then select shippedQty.
26. Click **OK**.
27. Click the **Right Value** icon.

28. In the **Condition Browser**, click null.
29. Click **OK**.



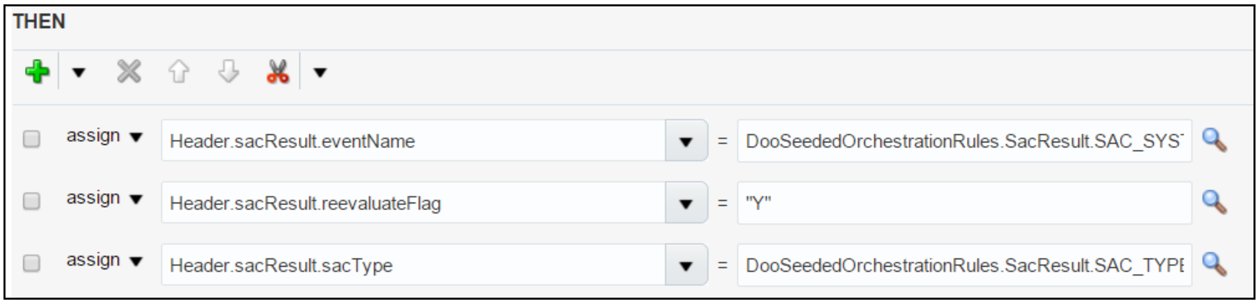
Create the Then Statement: Then Pause the Process.

In this section, you create the THEN statement.

30. In the **THEN** region, click the **Add Action** list, and select assign.
31. In the **Select a Target** list, select Header.sacResult.eventName.
32. Click **Expression Value**.

33. In the **Condition Browser**, expand DooSeededOrchestrationRules and then SacResult.
34. Select SAC_SYSTEM_EVENT_IPC_PAUSE.
35. Click **OK**.
36. In the **THEN** region, click the **Add Action** list and then select assign.
37. In the **Select a Target** list, select Header.sacResult.reevaluateFlag.
38. Click **Expression Value**.
39. In the **Condition Browser**, enter `"Y"`. You must include the double quotation marks.
40. Click **OK**.
41. In the **THEN** region, click the **Add Action** list, and select assign.

42. In the **Select a Target** list, select Header.sacResult.sacType.
43. Click **Expression Value**.
44. In the **Condition Browser**, expand DooSeededOrchestrationRules, expand SacResult, and then click SAC_TYPE_EVENT.
45. Click **OK**. The following screenshot shows the result of creating the three actions described above.



46. In the **Pause Rule: CustomDOO_OUStandardOrdersProcessXX** window, click **Validate**.
47. Click the **Save** button for the rule.
48. On the **Edit Orchestration Process Definition: CustomDOO_OUStandardOrdersProcessXX** page, click the page-level **Save and Close** button to save the rule in the process.

Practice Complete:

You've successfully created rules that pause and release the process at runtime, based on runtime data.

Practices for Lesson 17: Managing Statuses

Practice 17-1: Creating a Status Value and Enabling It for Fulfillment Lines

Overview

In this practice, you create status values and enable them for use in fulfillment line status conditions.

You’re an order administrator for Vision Corporation. You must add status codes that you need for fulfillment line status definitions.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to Manage Status Values Page
- Add New Status Codes
- Enable for Fulfillment Lines

Tasks

Navigate to Manage Status Values Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Status Values** task. Select the task in the **Orders** functional area.

Add New Status Codes

4. On the **Manage Status Values** page, click **Actions**, and then select **Create**.
5. In the **Create Status Code** dialog box, in the **Code** field, enter: `SCHED_GOODS_XX`
6. In the **Name** field, enter: `Scheduled Goods`. This is how the status will appear in the **Order Orchestration** work area.
7. Click **Save and Create Another**.
8. In the **Code** field, enter: `SCHED_CLOTHING_XX`
9. In the **Name** field, enter: `Scheduled Clothing Merchandise`
10. Click **Save and Close**.

Enable the Status Codes for Fulfillment Lines

11. On the **Manage Status Values** page, select the **Fulfillment Lines** tab.
12. Click **Actions**, and then click **Select and Add**.

13. In the **Select and Add** dialog box, in the **Status Code** field, enter: `SCHED_GOODS_XX`. The codes are case-sensitive. Then, click **Search**.
14. Select Scheduled Goods, and then click **Apply**.
15. In the **Status Code** field, enter: `SCHED_CLOTHING_XX`. The codes are case-sensitive. Then, click **Search**.
16. Select Scheduled Clothing Merchandise, and then click **OK**.
17. On the **Manage Status Values** page, click **Save and Close**.

Practice Complete

Users can now select the SCHED_GOODS_XX and SCHED_CLOTHING_XX statuses for fulfillment line status conditions in an orchestration process.

Practice 17-2: Creating a Status Value and Enabling It for Pass-Through

Overview

In this practice, you create status values and enable them for use for status pass-through.

You're an order administrator for Vision Corporation. You must add status codes that your company needs for pass-through of status values returned by fulfillment systems.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to Manage Status Values Page
- Add New Status Codes
- Enable for Fulfillment Lines
- Enable for Task Type

Tasks

Navigate to Manage Status Values Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Status Values** task. Select the task in the **Orders** functional area.

Add New Status Codes

4. On the **Manage Status Values** page, select the **Status Codes** tab.
5. Click **Actions**, and then select **Create**.
6. In the **Create Status Code** dialog box, in the **Code** field, enter: `DELIVERED_XX`
7. In the **Name** field, enter: `Delivered_XX`. This is how the status will appear in the Order Orchestration work area.
8. Click **Save and Close**.

Enable for Fulfillment Lines

9. On the **Manage Status Values** page, select the **Fulfillment Lines** tab.
10. Click **Actions**, and then select **Select and Add**.

11. In the **Select and Add** dialog box, in the **Status Code** field, enter: `DELIVERED_XX`. The codes are case-sensitive. Then, click **Search**.
12. Select Delivered_XX, and then click **OK**.
13. On the **Manage Status Values** page, click **Save**.

Enable for Task Type

14. On the **Manage Status Values** page, select the **Task Types** tab.
15. In the **Task Types** list, select the **Shipment** row. You may want to query by example to help you locate this value. Click , and enter: `Shipment`
16. In the **Shipment: Status Values** area, click the **Add Row** icon.
17. In the **Status Value** field, select DELIVERED_XX. The codes are case-sensitive.
18. In the **Split Priority** field, enter your student number. Check the **Shipment: Status Values** area to verify that this integer isn't already in use.
19. Click **Save and Close**.
20. In the **Setup and Maintenance** work area, search for and then select the **Manage Task Status Conditions** task.
21. On the **Manage Task Status Conditions** page, select the **Shipment** row.
22. Click the **Add Row** icon in the **Shipment: Status Conditions** area.
23. In the **Create Status Condition** dialog box, select:

Field	Value
Internal Status Value	Delivered_XX
Display Status Value	DELIVERED_XX
Mark as Complete	Selected

24. Click **Save and Close**.
25. In the **Warning** dialog box, click **OK**.
26. On the **Manage Task Status Conditions** page, click **Save and Close**.

Practice Complete

The shipment task layer can now receive the DELIVERED_XX status and use it to create fulfillment line status conditions.

Practice 17-3: Creating an Orchestration Process Class

Overview

In this practice, you create an orchestration process class.

You're an order administrator for Vision Corporation. You must create some orchestration process classes that contain the statuses that your company needs for some orchestration process definitions.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage Status Values Page
- Create the Orchestration Process Class

Tasks

Navigate to the Manage Status Values Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Status Values** task. Select the task in the **Orders** functional area.

Create the Orchestration Process Class

4. On the **Manage Status Values** page, select the **Orchestration Process Classes** tab.
5. In the top region of the **Orchestration Process Classes** tab, click **Actions**, and then select **Create**.
6. In the new row, enter:

Field	Value
Code	Process_Class_XX
Name	Process Class XX
Description	Process class for standard orders

7. Click **Save**.
8. In the **Process_Class_XX: Status Values** area, click **Actions**, and then select **Add Row**.
9. In the **Status Value** list, select `Scheduled` (with a status code of SCHEDULED).

10. Repeat steps 10 and 11, selecting each of the following status values: `Shipped`, `Reserved`, `Billed`, `Returned to Customer`, `Supply Request Complete`, `Requisition Created (DOO_REQ_CREATED)`, `Waiting`.
11. Click **Save and Close**.

Practice Complete

Users of Order Management can now select the Shipped, Reserved, Billed, Returned to Customer, Supply Request Complete, Requisition Created, and Waiting statuses for orchestration process status conditions in an orchestration process.

Practice 17-4: Creating Status Conditions for an Orchestration Process

Overview

In this practice, you create status conditions for an orchestration process.

Vision Corporation needs an orchestration process that reflects the steps required to fulfill orders for company t-shirts. The orchestration process definition must designate how to indicate the status of the orchestration process at any point in time. The status of the orchestration process is based on the status of the tasks. In this practice, you create the conditions that designate the status of the orchestration process.

When you create an orchestration process status condition, you must decide which orchestration process class to use and which statuses you want to reflect the status of the orchestration process.

Prerequisites

- Practice 16-2
- Practice 17-3

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to Manage Orchestration Process Definitions Page
- Open Your Orchestration Process for Editing
- Create Status Conditions for an Orchestration Process

Tasks

Navigate to Manage Orchestration Process Definitions Page

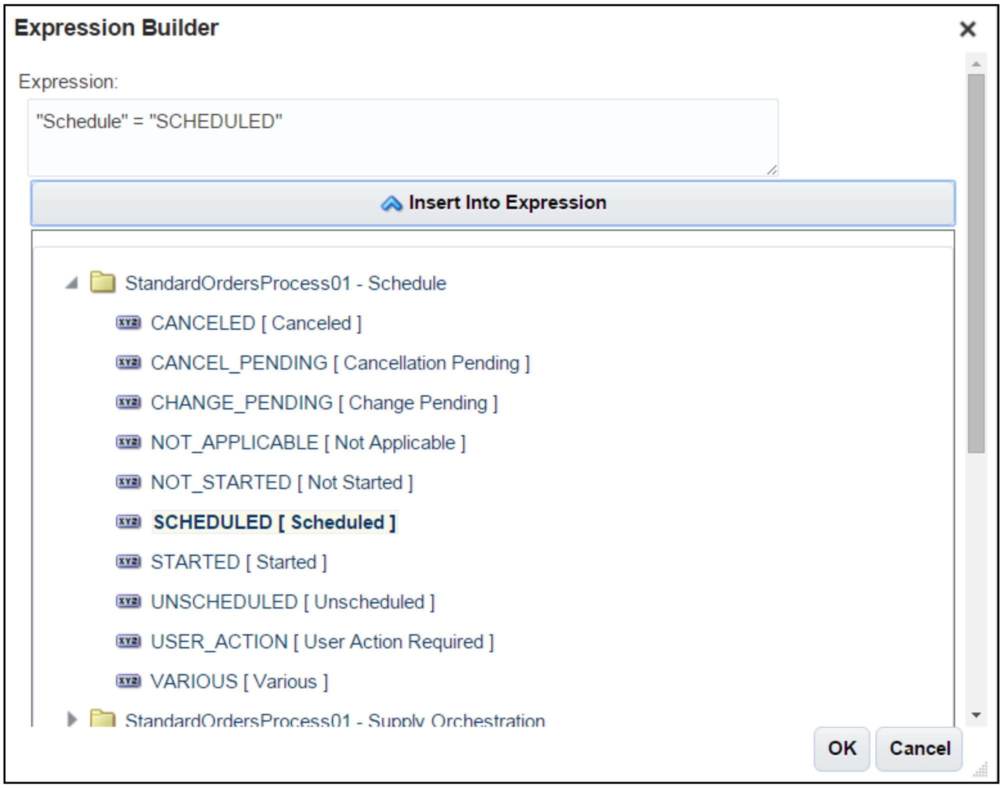
1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Orchestration Process Definitions** task. Select the task in the **Orders** functional area.

Open Your Orchestration Process for Editing

4. On the **Manage Orchestration Process Definitions** page, enter your orchestration process name (CustomDOO_OUStandardOrdersProcessXX<first letter of last name>) from practice 16-2 in the **Process Name** field, and then click **Search**.
5. Click **Actions**, and then select **Edit**.

Create Status Conditions for an Orchestration Process

6. On the **Edit Orchestration Process Definition** page, in the **Process Class** list, select `Process Class XX`.
7. In the **Warning** dialog box, click **OK**.
8. On the **Edit Orchestration Process Definition: CustomDOO_OUStandardOrdersProcessXX,** click **Save**.
9. Select the **Status Conditions** tab.
10. In the **Orchestration Process Status Values** tab, click **Actions**, and then select **Add Row**.
11. In the **Sequence** field, enter: `1`
12. In the **Status Value** list, select `Scheduled`. This is the status that you want to be used to represent the status of the orchestration process.
13. Click the **Expression** icon. You are building the following If-Then statement: If the Schedule task equals Schedule, then use SCHEDULED to represent the orchestration process status.
14. In the **Expression Builder** dialog box, select CustomDOO_OUStandardOrdersProcessXX - Schedule.
15. Click **Insert Into Expression**. The value appears in the **Expression** field as “Schedule`.”` To confirm that you selected the correct value, view the **Tasks** tab at the bottom of the **Expression Builder**.
16. Select the **Operators** tab, and then select `=`
17. Click to the right of Schedule in the **Expression** field, and then click **Insert Into Expression** to add the `=` to the right of “Schedule.” Alternatively, in the **Expression** field, enter: `=`
18. Select the **Tasks** tab, and expand CustomDOO_OUStandardOrdersProcessXX - Schedule.
19. Select SCHEDULED.
20. In the **Expression** field, click to the right of the `=`, and then click **Insert Into Expression**. Alternatively, if you enter `"SCHEDULED,"` then you must include the double quotation marks.
21. Make sure your work resembles the following expression: “Schedule”=”SCHEDULED. The following screenshot shows this expression in the **Expression** field of the **Expression Builder**.



22. Click **OK** to close the **Expression Builder**.
23. On the **Edit Orchestration Process Definition** page, click **Save and Close**. You've associated a status value with your orchestration process. Normally, however, you'd need more statuses, such as these:

Sequence	Status Value	Status Condition
2	Reserved	"Reserve" = "RESERVED"
3	Shipped	"Ship" = "SHIPPED"
4	Waiting	"Pause" = "WAITING"
5	Billed	"Invoice" = "BILLED"
6	Supply Request Complete	"Supply Orchestration" = "DOO_SUPPLY_REQ_COMPLETE"
7	Requisition Created	"Procure" = "DOO_REQ_CREATED"

Practice Complete

You've associated a status value with your orchestration process and designated its sequence.

Practice for Lesson 18: Planning Orchestration Processes

Practice 18-1: Adding Planning Parameters to an Orchestration Process Definition Overview

In this practice, you add planning parameters to the orchestration process that you duplicated in lesson 16.

In this scenario, you're an order administrator at Vision Corporation. You want to change the average time it takes to complete various tasks. Typically, it takes 6 days to ship the items from the warehouse. In this practice, you also change the lead times for the other steps in the process to match the average time it takes for those steps. This information is used to calculate the delays and jeopardy scores.

Prerequisites

Practice 16-2

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Open Your Orchestration Process Definition for Editing
- Add Lead Time to the Steps

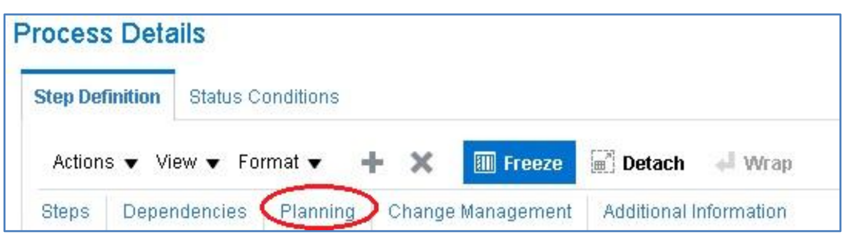
Tasks

Open Your Orchestration Process Definition for Editing

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select **Order Management**.
3. Search for the **Manage Orchestration Process Definitions** task. Select the task in the **Orders** functional area.
4. On the **Manage Orchestration Process Definitions** page, in the **Process Name** field, enter: CustomDOO_OUStandardOrdersProcessXX<first letter of your last name>. Click the **Search** button.
5. Click **Actions**, and then select **Edit**.

Add Lead Time to the Steps

6. On the **Edit Orchestration Process Definition** page, click the **Planning** subtab in the **Step Definition** tab.



7. Enter or select values as follows:

Step	Default Lead Time	Lead Time UOM
Schedule	5	Minutes
Request Supply	5	Minutes
Create Reservation	5	Minutes
Create Shipment Request	5	Minutes
Wait for Shipment Advice	6	Days
Pause for Coordination	5	Days
Create Invoice	5	Minutes
Wait for Invoice	2	Days

   Notice that the wait steps take days, whereas automated tasks, such as Schedule and Create Reservation, take minutes.

8. Optionally, you can change the values for any of the other steps or leave them as they were in the process definition that you duplicated.
9. Click **Save and Close**.

Practice Complete

You added planning parameters to the orchestration process that you duplicated in lesson 16.

Practice for Lesson 19: Deploying Orchestration Processes

Practice 19-1: Releasing and Deploying an Orchestration Process Definition

Overview

You are an order administrator for Vision Corporation. You need to release and deploy the orchestration process definition that you created to reflect your company's business practices to allow for coordination of invoicing lines on an order. In this practice, you release the process and deploy it to the servers, so that it can be tested. Your new orchestration process definition then is available to test the automation of this enhanced business process.

Prerequisites

Practice 18-1

User Login

scmXX.student (XX is the student number assigned to you)

Tasks

Navigate to the Edit Orchestration Process Definition Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select **Order Management**.
3. Search for the **Manage Orchestration Process Definitions** task. Select the task in the **Orders** functional area.
4. On the **Manage Orchestration Process Definitions** page, in the **Process Name** field, enter: `CustomDOO_OUStandardOrdersProcessXX<first letter of your last name>`. Then click the **Search** button.
5. Click **Actions**, and then click **Edit**.

Release and Deploy the Orchestration Process Definition

6. At the top of the page, click **Actions** and then select **Validate**. Click **OK** to close the validation message. If errors appear, then examine the setup directions in previous lessons and correct the errors.
7. Click **Actions** at the top of the page, and then click **Release**. Note: Validation runs again before the process is released, so if you didn't fix all of the errors presented in step 6, the release process stops when the errors are identified.
8. In the **Download Generated Process** dialog box, click the **X** to close it. Click **OK** to close the **Information** message.
9. Click **Actions** at the top of the page, and then click **Deploy Process**.
10. In the **Deploy Process** dialog box, in the **Password** field, enter your login password, and then click **Deploy**.
11. In the **Confirmation Message** dialog box, click **OK**.

12. On the **Edit Orchestration Process Definition** page, click **Save and Close**.

Practice Complete

You released and deployed an orchestration process definition.

Demo for Lesson 20: Managing Jeopardy

Demo 20-1: Modifying Jeopardy Priorities

Overview

In this scenario, you are an order administrator at Vision Corporation. You want to change the classification that represents the severity of risk when a task is delayed. You want a jeopardy score of up to 200 to be treated as Low priority.

Jeopardy priorities are predefined.

Prerequisites

None

User Login

scm00.Instructor

Tasks

Navigate to the Manage Jeopardy Priorities Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select **Order Management**.
3. Search for the **Manage Jeopardy Priorities** task. Select the task in the **Orders** functional area.
4. On the **Manage Jeopardy Priorities** page, keep `0` as the low value of the range in the **Low** row under **Minimum Score**.
5. In the **Maximum Score** field of the **Low** row, enter: `200`.
6. In the **Minimum Score** field of the **Medium** row, enter: `200`. The low minimum score of the row must equal the maximum score of the previous row.
7. In the **Maximum Score** field of the **Medium** row, enter: `400`.
8. In the **Minimum Score** field of the **High** row, enter: `400`. The low minimum score of the row must equal the maximum score of the previous row.
9. In the **Maximum Score** field of the **High** row, enter: `600`.
10. Click **Save and Close**.

Demo Complete

You modified jeopardy priorities.

Practices for Lesson 20: Managing Jeopardy

Practice 20-1: Creating a Jeopardy Threshold Definition

Overview

In this scenario, you're an order administrator at Vision Corporation. You have a clothing line that you sell to an important customer. You want to maintain a good service level agreement with this customer, so you want Order Management to alert you if the shipping task is delayed by more than 2 days.

In this practice, you create jeopardy thresholds for the orchestration process that you created in lesson 16. The jeopardy thresholds apply to the Shipping task and Shipment task type.

Prerequisites

Practice 19-1

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage Jeopardy Threshold Definitions page
- Create Jeopardy Threshold Definitions

Tasks

Navigate to the Manage Jeopardy Threshold Definitions Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select **Order Management**.
3. Search for the **Manage Jeopardy Thresholds** task. Select the task in the **Orders** functional area.

Create Jeopardy Threshold Definitions

4. On the **Manage Jeopardy Threshold Definitions** page, click **Actions**, and then click **Create**.
5. On the **Create Jeopardy Threshold Definitions** page, in the **Code** field, enter: `ClothingJeopardyXX`
6. In the **Name** field, enter: `Clothing Jeopardy Thresholds XX`
7. Enter a description: `Jeopardy thresholds for company t-shirts`.
8. In the **Process Name** list, select CustomDOO_OUStandardOrdersProcessXX<first letter of your last name>. If your process doesn't appear, then wait a few minutes. Your process appears only after Order Management finishes deploying it.
9. In **Task Type**, select Shipment.
10. In **Task Name**, select Ship.
11. In the **Jeopardy Threshold Ranges** area, click **Actions**, and then click **Add Row**.

12. In the **Maximum Delay** column, enter: `2`.
13. In the **Maximum UOM** column, select Days.
14. View the **Jeopardy Priority** table in the corner. The values appear here, so that you can consider them when you select score values.
15. In the **Score** column, enter a valid value from the **Jeopardy Priority** low range, such as 30.
16. Click **Actions**, and then click **Add Row**.
17. In the **Maximum Delay** column, enter: `5`.
18. In the **Maximum UOM** column, select Days.
19. In the **Score** column, enter a valid value from the **Jeopardy Priority** medium range, such as 260.
20. Click **Actions**, and then click **Add Row**.
21. In the **Maximum Delay** column, enter: `8`.
22. In the **Maximum UOM** column, select Days.
23. In the **Score** column, enter a valid value from the **Jeopardy Priority** high range, such as 460.
24. Click **Save and Close**.

Practice Complete

You created a jeopardy threshold definition.

Practice 20-2: Submitting an Order to See Runtime Planning Changes

Overview

You are an order entry specialist at Vision Corporation. You submit an order that is assigned to the orchestration process that you created in lesson 16, and you examine the planning and jeopardy values for the order. Because the customer wants the order very early, you notice that the order is in jeopardy as soon as it's submitted.

Prerequisites

Practice 20-1

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Check the Process Planning and Jeopardy Parameter
- Remove the B2B Compensation Pattern from the Request Step
- Create and Submit a New Order
- View Processing Order

Tasks

Check the Process Planning and Jeopardy Parameter

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select **Order Management**.
3. Search for the **Manage Order Management Parameters** task. Select the task in the **Orders** functional area.
4. On the **Manage Order Management Parameters** page, scroll through the parameter names in the **General** tab, and then select Enable Orchestration Process Planning and Jeopardy Calculation.
5. In the **Enable Orchestration Process Planning and Calculate Jeopardy: Values** area, make sure Yes is selected.
6. In the warning message, click **Yes**.
7. Click **Save and Close**.

Create and Submit a New Order

8. From the **Navigator**, select **Order Management**, and then click **Order Management**.
9. On the **Overview** page, click **Create Order**.
10. In **Business Unit,** select US1 Business Unit.
11. In the **Customer** field, enter: `Computer Service and Rentals`

12. Set the **Bill-to Customer** to Computer Service and Rentals. Make sure you select the value, even if it appears automatically when you select business unit.
13. In the **Select Item** field, enter `AS46334`. Then, press the Tab key on your keyboard.
14. Click **Add** to add the item to the order.
15. Click the **Shipment Details** icon.
16. On the **General** subtab, change **Requested Date** to a date that will cause an apparent delay within one of your jeopardy thresholds. For example, leave the requested date as current date.
17. Click the **Shipping** subtab. In the **Packing Instructions** field, enter: `CustomDOO_OUStandardOrdersProcessXX<first letter of your last name>`. This is a workaround used only in the training environment. If this were a production environment, you would create a process assignment rule that provides the conditions under which an orchestration process is assigned automatically when an order is submitted. For this practice, assume that the order administrator from Vision Corporation already created a rule that assigns the orchestration process based on the packing instructions, in this case, CustomDOO_OUStandardOrdersProcessXX<first letter of your last name>.
18. Click the **Supply** subtab, and then select Warehouse 001 - Seattle.
19. Click **Save**. Note the sales order number that the **Create Order** page displays at the top of the page. For example, 73006 is the order number for the following order: Computer Service and Rentals - 73006 – Draft. Write down this number. You will need it later.
20. Click **Submit**.
21. In the **Confirmation** message, click **OK**.

View Processing Order

22. On the **Order** page, click the **Actions** menu, and then select **Switch to Fulfillment View**. You won't see this option until the order is in Processing status.
23. Select the **Fulfillment Lines** tab.
24. Examine the value for the **Orchestration Process Name** on the fulfillment line to make sure the orchestration process listed in the **Packing Instructions** field was assigned. In a production environment, the number of the orchestration process assigned by the process assignment rule would appear here.
25. Hover on any icons in the **Exception Type** column, and notice the exception type.
26. Click the **Orchestration Process Number** link to navigate to the **Orchestration Process** page.
27. Examine the header attributes: Jeopardy Score, Jeopardy Reason, Jeopardy Priority, and Planned Completion Date.
28. Scroll down on the summary form and examine the fulfillment line attributes. Is the jeopardy score different from what is shown at the header? Do you think the values would be the same if there were additional fulfillment lines on the order with different jeopardy values?
29. View the Gantt chart on the **Orchestration Plan** tab. Note the fulfillment line status.

30. Examine the planning data for the first task. You may have to scroll down to see the form data. Are all planning dates populated?
31. Examine the planning data for each of the other tasks. Are there planning dates for tasks with a status of Not Started? What dates aren't populated?
32. Click **Done**.

Practice Complete

You submitted an order to see runtime planning changes.

Demo for Lesson 22: Promising Orders

Demo 22-1: Creating and Assigning Oracle Fusion Global Order Promising Rules

Overview

This demonstration shows how to create sourcing rules and ATP rules, and assign them to a specific entity, such as an item-organization or category.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Order Promising Overview Page
- Create Sourcing Rule
- Specify a Sourcing Rule Effective Date Range Starting from Yesterday
- Specify Sources to the Rule
- Create Assignment Set
- Assign Sourcing Rules
- Create ATP Rule
- Assign ATP Rule

Tasks

Navigate to the Order Promising Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Global Order Promising**.

Create Sourcing Rule

2. In the **Global Order Promising** work area, click the **Tasks** panel tab and then select **Manage Sourcing Rules**.
3. On the **Manage Sourcing Rules** page, under **Search Results**, click the **Actions** menu and then select **Create**.
4. On the **Create Sourcing Rule** page, in the **Name** field enter: `Sourcing_Rule_Item_00`.
5. Select the **Organization Assignment Type** as **Global**.
6. Click **Save**.

Specify a Sourcing Rule Effective Date Range Starting from Yesterday

7. In the **Sourcing Rule Effective Dates** area, click the **Actions** menu and then select **Add Row**.

8. In the **Start Date** field, select yesterday's date. You don't need to enter an end date.

Specify Sources to the Rule

9. Click the **Add Row** icon in the **Effective Start Date <Date>: Sources** section to specify sources.
10. Specify sources by adding "Buy from" and "Transfer from" rows follows:

Type	Enabled Fields	Values
Buy from	a. Supplier b. Supplier Site c. Supplier Site Source System d. Allocation Percentage e. Rank	a. Allied Manufacturing b. Allied US 1 c. OPS d. 100 e. 1
Transfer from	a. Organization b. Allocation Percentage c. Rank	a. Organization 002 b. 100 c. 2

11. Click **Save**.

Create Assignment Set

12. Click the **Tasks** panel tab, and then select **Manage Assignment Sets**.
13. On the **Manage Assignment Sets** page, in the **Actions** menu, select **Create**.
14. On the **Create Assignment Set** page, in the **Name** field, enter: `Assignment_Set_00`.
15. Click **Save**.

Assign Sourcing Rules

16. In the **Sourcing Assignments** area, in the **Actions** menu, select **Add Row**.
17. Click the row right below **Assignment Level**. A list appears. Click the different options in this list. Note with each assignment level you select, a different set of fields appears. Available options:

Assignment Level	Enabled Fields
Global	a. Sourcing Type b. Sourcing Rule or Bill of Distribution
Category	a. Category b. Sourcing Type c. Sourcing Rule or Bill of Distribution
Item	a. Item b. Sourcing Type c. Sourcing Rule or Bill of Distribution

Assignment Level	Enabled Fields
Region	a. Sourcing Type b. Sourcing Rule or Bill of Distribution c. Zone d. Region
Category and Region	a. Category b. Sourcing Type c. Sourcing Rule or Bill of Distribution d. Zone e. Region
Item and Region	a. Item b. Sourcing Type c. Sourcing Rule or Bill of Distribution d. Zone e. Region
Demand Class	a. Demand Class b. Sourcing Type c. Sourcing Rule or Bill of Distribution
Customer	a. Customer b. Sourcing Type c. Sourcing Rule or Bill of Distribution
Customer and Customer Site	a. Customer b. Customer Site c. Sourcing Type d. Sourcing Rule or Bill of Distribution
Category and Demand Class	a. Demand Class b. Category c. Sourcing Type d. Sourcing Rule or Bill of Distribution
Category and Customer	a. Customer b. Category c. Sourcing Type d. Sourcing Rule or Bill of Distribution
Category and Customer and Customer Site	a. Customer b. Customer Site

Assignment Level	Enabled Fields
	c. Category d. Sourcing Type e. Sourcing Rule or Bill of Distribution
Item and Demand Class	a. Demand Class b. Item c. Sourcing Type d. Sourcing Rule or Bill of Distribution
Item and Customer	a. Customer b. Item c. Sourcing Type d. Sourcing Rule or Bill of Distribution
Item and Customer and Customer Site	a. Customer b. Customer Site c. Item d. Sourcing Type e. Sourcing Rule or Bill of Distribution
Organization	a. Organization b. Sourcing Type c. Sourcing Rule or Bill of Distribution
Category and Organization	a. Organization b. Category c. Sourcing Type d. Sourcing Rule or Bill of Distribution
Item and Organization	a. Organization b. Item c. Sourcing Type d. Sourcing Rule or Bill of Distribution

Note: If you had created a local rule, then only the Organization, Category and Organization, and Item and Organization assignment levels apply.

18. Select the following assignment information:
    - **Assignment Level**: Global
    - **Sourcing Type**: Sourcing rule
    - **Sourcing Rule or Bill of Distribution:** Select the rule you created above.
19. Click **Save**.

Create ATP Rule

20. On the **Global Order Promising** page, click the **Tasks** panel tab, and select **Manage ATP Rules**.
21. On the **Manage ATP Rules** page, in the **Search Results** area, click the **Actions** menu, and then select **Create**.
22. On the **Create ATP Rule** page, in the **Name** field enter: `ATP_Rule_00`.
23. In the **ATP Rule Criteria** tab, under **Promising Attributes,** note how the enabled fields change based on the ATP promising mode that you select. Available options:

Promising Mode	Enabled Fields
Supply Chain Availability Search	a) Search Components and Resources b) Enable Profitable to Promise Search c) Respect Allocation Constraints d) Supply Types e) Demand Types f) Infinite Availability Fence Definition g) User-Defined Fence in Days h) Past-Due Demand Considered in Days i) Past-Due Supply Considered in Days j) ATP Time Fence Definition k) User-Defined Fence in Days
Lead Time Based	a. Lead Time Considered b. User-Defined Lead Time in Days
Infinite Availability Based	None

24. Select **Lead Time Based** promising mode, and provide the following values:
    - Lead Time Considered: User-Defined Lead Time
    - User Defined Lead Time in Days: 10

Assign ATP Rule

25. Click the **ATP Rule Assignment** tab.
26. In the **Actions** menu, select **Add Row**.
27. Select a value in the **Assignment Basis** field. Note how the enabled fields change based on the assignment basis that you select.

Assignment Basis	Enabled Fields
Category	Assigned-to Item Category
Item	Assigned-to Item
Organization	Assigned-to Organization
Item and Organization	a. Assigned-to Organization b. Assigned-to Item

28. Select **Item**. Search for and select AS89140.
29. Click **Save and Close**.

    Note: You can assign only one item per rule. If an error appears, then this item already was assigned to a rule. Select a different item.

Demo Complete

You have created a global sourcing rule. You have also created a lead time-based ATP rule for item AS89140.

Practices for Lesson 22: Promising Orders: Rules

Practice 22-1: Creating Sourcing and ATP Rules and Assigning Them to an Assignment Set

Overview

Your company sells a range of systems. If a requested ship-from warehouse isn't listed on a demand, then global sourcing rules determine which warehouse the supply is shipped from to meet demand on time.

For your Slimline category of tablets, you want to ship from Organization 002 first. If the demand can't be promised on time there, then you want to ship from Organization 003. At Organization 003, you have an arrangement with supplier MidTown Computer Supplies to address any shortfall in case the demand can't be met on time through your internal warehouses.

For your product AS4751100, you rely on your internal warehouses to meet demand. The first option is to ship from Organization 002. If shipping from this warehouse causes late delivery, then the next option is to ship from Organization 003.

In this practice, you create multiple global sourcing rules and assign them to different assignment levels within a single assignment set.

Prerequisites

None

Summary of Tasks

- Navigate to the Order Promising Overview Page
- Create Multiple Global Sourcing Rules with Effective Date Range Starting from Yesterday
  - Create Rule 1
  - Create Rule 2
  - Create Rule 3
- Create an Assignment Set
- Assign the Sourcing Rules
- Create and Assign 1st ATP Rule
- Create and Assign 2nd ATP Rule

Tasks

Navigate to the Order Promising Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Global Order Promising**.

Create Multiple Global Sourcing Rules with Effective Date Range Starting from Yesterday

2. On the **Global Order Promising Overview** page, click the **Tasks** panel tab on the right, and then select **Manage Sourcing Rules**.
3. On the **Manage Sourcing Rules** page, click **Actions**, and then select **Create**.

Create Rule 1

4. On the **Create Sourcing Rule** page, in the **Name** field, enter:
   `XX_Test_Sourcing_Rule_Category`
5. Select the **Organization Assignment Type** as **Global**.
6. Click **Save**.
7. In the **Sourcing Rule Effective Dates** area, click the **Add Row** icon.
8. In the **Start Date** field, select yesterday's date. You don't need to enter an end date.
9. In the **Effective Start Date** <yesterday's date>: **Sources** section, click the **Add Row** icon.
10. Specify a source by clicking the **Add Row** icon. Add a "Transfer from" row as follows:

Type	Enabled Fields	Values
Transfer from	a. Organization b. Allocation Percent c. Rank	a. 002 b. 100 c. 1
Transfer from	a. Organization b. Allocation Percent c. Rank	a. 003 b. 100 c. 2

11. Click **Save and Create Another**.

Create Rule 2

12. On the **Create Sourcing Rule** page, in the **Name** field, enter:
    `XX_Test_Sourcing_Rule_Item`
13. Select the **Global Organization Assignment Type**.
14. In the **Sourcing Rule Effective Dates** area, click the **Actions** menu, and then select **Add Row**.
15. In the **Start Date** field, select yesterday's date.
16. In the **Effective Start Date <yesterday's date>: Sources**, click the **Add Row** icon.
17. Specify two sources by adding "Transfer from" rows as follows:

Type	Enabled Fields	Values
Transfer from	a. Organization b. Allocation Percent c. Rank	a. 002 b. 100 c. 1
Transfer from	a. Organization b. Allocation Percent c. Rank	a. 003 b. 100 c. 2

18. Click **Save and Create Another**.

Create Rule 3

19. On the **Create Sourcing Rule** page, in the **Name** field enter: `XX_Local_Sourcing_Rule_at_005`
20. Select the **Organization Assignment Type** as **Local**.
21. In **Organization**, select **005**.
22. Click **Save**.
23. In the **Sourcing Rule Effective Dates** section, click the **Actions** menu, and then select **Add Row**.
24. In the **Start Date** field, select yesterday's date.
25. In the **Effective Start Date <yesterday's date>: Sources** area, click the **Add Row** icon.
26. Make these selections:

Field	Value
Type	Buy from
Supplier	Midtown Computer Supplies (You must search for this value.)
Supplier Site	MCS US1
Allocation Percent	100
Rank	1

27. Click the **Save** arrow, and then select **Save and Close**.

Create an Assignment Set

28. On the **Global Order Promising Overview** page, click the **Tasks** panel tab and then select **Manage Assignment Sets**.
29. On the **Manage Assignment Sets** page, click the **Actions** menu, and then select **Create**.
30. On the **Create Assignment Set** page, in the **Name** field, enter: `XX_Assignment_Set`
31. Click **Save**.

Assign the Sourcing Rules

32. In the **Sourcing Assignments** area of the **Create Assignment Set** page, click the **Actions** menu, and then select **Add Row**.
33. In the **Assignment Level** field, select **Category**.
34. In the **Category** field, select an appropriate category, such as Slimline Tablets.
35. In the **Sourcing Type** field, select Sourcing rule.
36. In **Sourcing Rule or Bill of Distribution,** select sourcing rule XX_Test_Sourcing_Rule_Category. You need to search for and select it.
37. In the **Actions** menu, select **Add Row**.
38. In the **Assignment Level** field, select **Item**.
39. In the **Item** field, select an item, such as AS4751100.

40. Add a sourcing rule. In the **Sourcing Type** field, select **Sourcing rule**.
41. In **Sourcing Rule or Bill of Distribution,** select sourcing rule **XX_Test_Sourcing_Rule_Item**.
42. In the **Sourcing Assignments** area, click the **Actions** menu, and then select **Add Row**.
43. In the **Assignment Level** field, select **Organization**.
44. In the **Organization** field, select **005**.
45. In the **Sourcing Type** field, select **Sourcing rule**.
46. In the **Sourcing Rule or Bill of Distribution**, select **XX_Local_Sourcing_Rule_at_005**.
47. Click the **Save** arrow and then select **Save and Close**.

Create and Assign First ATP Rule

48. On the **Global Order Promising** work area, click the **Tasks** panel tab, and then select **Manage ATP Rules**.
49. In the **Search Results** area of the **Manage ATP Rules** page, click the **Actions** menu, and then select **Create**.
50. On the **Create ATP Rule** page, in the **Name** field, enter: `XX_Lead_Time_ATP_Rule`
51. In the **Promising Mode** field, select **Lead-Time Based**.
52. In the **Lead Time Considered** field, select **User-Defined Lead Time**.
53. In the **User-Defined Lead Time in Days** field, enter: `10`
54. Click **Save**.
55. Click the **ATP Rule Assignment** tab.
56. Click the **Actions** menu, and then select **Add Row**.
57. In the **Assignment Basis** field, select **Item**.
58. In the **Assigned-to Item** field, select **AS89085**.
59. Click **Save and Close**.

Create and Assign Second ATP Rule

60. On the **Manage ATP Rules** page, click the **Create** icon.
61. On the **Create ATP Rule** page, in the **Name** field, enter: `XX_Lead_Time_ATP_Rule_Category`
62. Click **Save**.
63. On the **ATP Rule Criteria** tab, select the **Lead time based** promising mode.
64. In the **Lead Time Considered** list, select **User-defined lead time**.
65. In the **User-Defined Lead Time in Days** field, enter: `10`
66. Click **Save**.
67. Click the **ATP Rule Assignment** tab.
68. In the **Actions** menu, select **Add Row**.
69. In the **Assignment Basis** field, select Category.

70. In the **Assigned-to Item Category** field, select Sentinel Laptops. If you get an error, then choose another category.
71. Click **Save and Close**.

Practice Complete

You've created and assigned sourcing rules and ATP rules to categories and items.

Practice 22-2: Promising Orders and Viewing Promising Rules That Were Applied

Overview

In this practice, you check availability for an order, and view the sourcing and ATP rules that influenced the promising results.

Prerequisites

Needed items, customers, suppliers, and other entities required for order promising already have been created in the environment.

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Order Management Overview Page
- Create an Order
- Promise an Order and View Its Sourcing and ATP Rules
- Review the Alternate Availability Options

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.

Create an Order

2. On the **Overview** page of the **Order Management** work area, click **Create Order**.
3. On the **Create Order** page, in the **Business Unit** list, select **US1 Business Unit**.
4. In the **Customer** field, enter: `Computer Service and Rentals`
5. In the **Select Item** field, enter: `AS6647331`. Then tab out of the field until you see the **Add** button. Item information is populated.
6. Click **Add**. An order line is created for that item. Details appear in the **Order Lines** table.
7. Click the **Shipment Details** tab.
8. On the **Shipment Details** tab, click the **Supply** subtab.
9. In the **Warehouse** field, select 003.
10. Click **Submit**.
11. A message appears confirming the action. Make a note of the sales order number, and then click **OK**.

Promise an Order and View Its Sourcing and ATP Rules

12. On the **Order: Computer Service and Rentals** page, in the **Actions** menu, select **Switch to Fulfillment View**.
13. Click the **Fulfillment Lines** tab.
14. Select the fulfillment line and then click **Check Availability**.
15. On the **Check Availability** page, review the default promising result and notice the warehouse that fulfilled the order.
16. Select the result.
17. In the **Actions** menu, select **Order Promising Rules** and then **View Sourcing Rule**.
18. Review the sourcing rule details.
19. Click **Cancel**.
20. In the **Actions** menu, select **Order Promising Rules** and then **View ATP Rule**.
21. Review the ATP rule that was applied to this order.
22. Click **Done**.

Review the Alternate Availability Options

23. Select the top row in the **Fulfillment Lines** table.
24. Select the blank value in the **Requested Ship-from Warehouse** field.
    Note: Scroll to the right to see this field.
25. Click **Refresh Results**.
26. If the **Availability Options** section is closed, then expand it.
27. If alternate sources are available, then the current option and alternative options appear.
28. Click **Done**.
29. On the **Order** page, click **Done**.

Practice Complete

You've checked availability for an order and viewed the sourcing and ATP rules that influenced the promising results.

Demo for Lesson 23: Promising Orders: Key Functionality

Demo 23-1: Promising Multiple Orders Using Check Availability

Overview

As an order manager, for demands that already are scheduled, you want to make sure that you have the best promising results that, optimally, match demand with supply. You achieve this goal by performing simulations involving alternate sources of supply, analyzing results, and selecting the right supply source by taking into consideration various factors such as costs, delay incurred, and shipping methods.

You may also perform simulations involving splits, substitutions, and supply reservation changes, but we won't discuss them in this exercise.

In this demonstration, you check the promising results for an order by checking availability, viewing availability options, and simulating different scenarios to improve promising results.

Prerequisites

Demo 22-1

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Order Management Overview Page
- Create Orders Using Student Number in the PO Field
- Select Fulfillment Lines and Check Availability
- Check Availability and Improve Promising Result

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.

Create Orders Using Student Number in the PO Field

Create three orders according to the following steps. Use your instructor number in the PO field, so that you can easily identify the orders that you created.

2. On the **Overview** page of the **Order Management** work area, click **Create Order**.
3. On the **Create Order** page, in the **Business Unit** list, select **US1 Business Unit**.
4. In the **Customer** field, enter: `Computer Service and Rentals`.
5. In the **Purchase Order** field, enter: `00`.
6. In the **Select Item** field, enter: `AS46336`. Then tab out of the field until you see the **Add** button. Item information is populated.
7. Click **Add**. An order line is created for that item. Details appear in the **Order Lines** table.

8. Click the **Shipment Details** tab.
9. On the **Shipment Details** tab, click the **Supply** subtab.
10. In the **Warehouse** field, select **001**.
11. Click **Submit**.
12. A warning message appears confirming the action. Make a note of this number. Then click **Create Another Order**. To complete your last order, click **OK** instead of **Create Another Order**.
13. Click **Done**.

Select Fulfillment Lines and Check Availability

14. On the **Overview** page of the Order Management work area, click the **Tasks** list and then select **Manage Fulfillment Lines**.
15. On the **Manage Fulfillment Lines** page, enter the PO of the orders that you created previously in the **Customer PO** field. Note: Alternatively, you can enter the number of one of the orders you created earlier in this demo in the **Order** field.
16. Click the **Search** button.
17. Select the fulfillment lines and then click **Check Availability**.
18. In the **Check Availability** window, select the default for all the lines you created in this demo, and then click **Submit**.

Check Availability and Improve Promising Result

19. On the **Check Availability** page, view the scheduling results for the fulfillment lines. Evaluate the following:
    - Using the value in the **Days of Delay** column, is the order delayed or on time?
    - Using the value in the **Scheduled Ship-from Warehouse** field, where is the order fulfilled from?
20. To view the supply availability report for a line, select the line and in the **Actions** menu, select **Review Supply Availability**.
21. In the **Review Supply Availability** report, check for sufficient availability of the item on the requested date.
22. Click **Done**.
23. On the **Check Availability** page in the **Analytics** area, view the **Item Availability** report for this item. Note the following:
    - Are there other sources of supply that currently have sufficient quantities of this item?
    - If so, which ones?
24. Click the **View Availability Options** button. Evaluate the following:
    - Were any availability options generated?
    - If not, why do you think no options appeared?
25. Click **Done**.

26. In the table on the **Check Availability** page, in the **Requested Ship-from Warehouse** field, select the blank line in the list, and click **Refresh Results**. Is the order promised on time now?
27. Select the current option and click **Schedule**.
28. Click **Done.** The scheduled information now appears on the fulfillment line, and the changed one is locked because it's undergoing change management.

Demo Complete

You have checked the promising results for an order using the Check Availability page, viewed availability options, and simulated different scenarios to improve promising results.

Practice for Lesson 23: Promising Orders

Practice 23-1: Repromising Multiple Orders Using Check Availability

Overview

You can select several of your previously scheduled demands at once and perform simulations using mass edit capabilities. For all your delayed demands for items you used in previous exercises, you can check whether the delay can be mitigated by simulating the switch to a substitute item. You can compare the results for lateness and schedule the orders as a batch if results are satisfactory.

In this practice, you'll review the promising of multiple orders using the Check Availability page. These orders are already scheduled, and you're now trying to improve their scheduling results.

Prerequisites

- Practice 22-1
- Practice 22-2

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Order Management Overview Page
- Copy Orders and Add the Student Number to the PO Field.
- Select Multiple Fulfillment Lines and Check Availability
- View Check Availability Results for a Batch of Orders

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.

Copy Orders and Add the Student Number to the PO Field

In this section, you copy your orders from practice 22-2 to create two to three orders. Add your student number XX to the Purchase Order field, so that you can quickly identify the orders that you created.

2. On the **Overview** page, in the **Search** field enter the number of the last order you created. Then click the **Search** icon.
3. On the order page, click **Actions** and then select **Copy**.
4. In the **Copy** dialog box, click **Create and Edit Order**.
5. On the **Edit Order** page, in the **Purchase Order** field enter: `XX`
6. Add item AS46334.

7. Make sure the **Bill-to Customer** and the **Bill-to Account** are populated. Select Computer Service and Rentals for the **Bill-to Customer**. The **Bill-to Account** information appears when the Bill-to Customer field is complete.
8. Click **Submit**.
9. In the **Confirmation** message, note the new order number, and then click **OK**.
10. Click **Done**.
11. On the **Order** page, create a second order by repeating steps 3, 4, and 7-10.
12. Create a third order the same way.
13. Click **Done**.

Select Multiple Fulfillment Lines and Check Availability

14. On the **Overview** page, click the **Tasks** list and then select **Manage Fulfillment Lines**.
15. On the **Manage Fulfillment Lines** page, enter the purchase order number of the orders that you created previously in the **Customer PO** field.
    Note: Alternatively, you can enter the order number in the **Order** field.
16. Click the **Search** button. The order might still be processing, so it might not appear the first time you click **Search**. You may have to click **Search** a few times before the order appears.
17. Select multiple lines and then click **Check Availability**.
18. In the **Check Availability** window, select all lines, accept the defaults and then click **Submit**.

View Check Availability Results for a Batch of Orders

On the **Check Availability** page, view the scheduling results for the batch of orders through the analytics. Evaluate the following:

- How do the original and proposed pie charts compare?
- Has the promising for the lines improved overall, or has it gotten worse?

19. In the **Fulfillment Lines** section of the page, click **View,** select **Columns**, and then enable **Allow Substitution**.
20. In the **Allow Substitution** column, select Yes for each line item
21. To review the **Supply Availability** report, select a line. Click **Actions** and then select **Review Supply Availability**. Is supply available?
22. Click **Done** to return to the **Check Availability** page.
23. On the **Check Availability** page, review the **Item Availability** report in the **Analytics** area. Is supply available for a substitute item? The substitute item is the other item number in the **Item** field.
24. Click **Refresh Results** at the top of the page, and review the promising results for the entire batch. Evaluate the following:
    - Are the overall results on the lines now better than on the original results?
    - Have the margins increased or reduced?

25. Click **Done** to return to the **Manage Fulfillment Lines** page. Don’t click **Schedule** or **Schedule All**.
26. Click **Done** to return to the **Overview** page.

Practice Complete

You’ve reviewed the promising of multiple orders using the **Check Availability** page. These orders were already scheduled, and you tried to improve their scheduling results.

Demo for Lesson 25:
Shipping Orders: Overview

Demo 25-1: Viewing the Inventory Management Landing Page

Overview

In this scenario, you are a logistics manager. You need to review the Receiving, Inventory and Shipping KPIs in your organization to understand what the priority work activities are for a given day. You drill into some infolets to get more detail about the KPI and flip or expand others to see the information in different contexts.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Inventory Management work area.
- Show how tasks are combined and grouped by functional area on the task list of the Inventory Management work area.
- Show how the quick search is combined across Receiving, Inventory, and Shipping objects.
- Show the toolbar Infolet Repository and Organization selector, and show how users can customize their desktop using the hide action on the infolet.
- Review infolets. Drill into infolets from the ring chart, and show how some infolets have a flip side or can be expanded to provide more information.

Reviewing Inventory Management Landing Page Infolets

Navigate to the Inventory Management Work Area

1. From the **Navigator**, select **Supply Chain Execution**, and then click **Inventory Management**.

Review Page Customization Options

2. On the **Inventory Management** page, hover over any infolet. An **Actions** menu appears upon hover.

3. Click **Actions,** and then select **Hide.** The infolet disappears from the page.
4. Select the **My Infolets** icon next to the panel tab, and then select the infolet you just hid.

   The infolet appears on the page once again.
5. Click the **View By** icon next to the **My Infolets** icon. Change the view by from **all** organizations to a single organization. Then, click **Apply.**

Review Task Groupings

6. On the **Inventory Management** page, click the **Tasks** panel tab. The **Show Tasks** field shows **Inventory** and links to all related inventory tasks appear below it.
7. Click the arrow next to **Show Tasks** and then select **Shipments**. The tasks change to shipping-related tasks.

Review Search Options

8. Click the **Quick Search** panel tab. 
9. Review the different search objects and associated attributes available for search.
10. Select Shipments as the search object.
11. Enter the following shipment number: `100`. If your entry exactly matches a shipment number or receipt number, then the quick search opens a single page view. The **Edit Shipment** page appears. Click **Cancel**.
12. On the **Manage Shipments** page, click **Cancel.**

Review Drill-Down Capabilities

13. In the **Shipment Lines** infolet, click a ring section. The **Manage Shipment Lines** page appears, showing the quantity of shipment lines from the ring section you clicked.
14. Click **Cancel**.

Review Flip and Expand Capabilities

15. On the **Inventory Management** page, click the right arrow in the lower right-hand corner on the **Shipment Lines** infolet. The infolet flips, showing more detailed pick information on the other side.

16. Click the left arrow in the lower left corner of the infolet to flip the infolet back to the front view.
17. In the lower-right corner of the **On-Hand Value** infolet, click the double arrows. Show that certain infolets can expand to display more detailed information, when it's available.
18. Click the double arrows again to collapse the infolet to its original state.

Demo Complete

You viewed the Inventory Management landing page.

Demo for Lesson 26:
Shipping Orders: Basic Setup

…

Demo 26-1: Defining Shipping Parameters

Overview

Go to the Manage Shipping Parameters page, where you show default settings pertaining to the activities in the Shipping application.

In this scenario, you are a shipping manager at Vision Corporation. In order to make shipments for the company, you must first define the shipping parameters for your organization. Use shipping parameters to define the default values for basic shipping information, such as units of measure, pick release rules, weight and volume calculations, and shipment grouping rules. Shipping parameters are organization-specific.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigating to the Setup and Maintenance Work Area
- Define Shipping Parameters
- Pick Release Area Parameters
- Shipment Grouping Attributes

Tasks

Navigating to the Setup and Maintenance Work Area

1. In the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Manufacturing and Supply Chain Materials Management** offering.
3. Search for the **Manage Shipping Parameters** task. Select the task in the **Shipping** functional area. Shipping parameters are organization-specific. Therefore, the **Select Organization** dialog box appears.
4. Select organization 001, and then click **OK**.

Define Shipping Parameters

On the **Manage Shipping Parameters** page, the parameters appear in the following regions: General, Pick Release, and Optional Shipment Grouping Attributes.

General Parameters

This section explains some of the general shipping parameters.

- Shipment Creation Criteria. Options: Within an order, Across orders
- Appending Limit. Options: Do not append, End of staging, Start of staging

- Packing Unit Capacity Method. Options: None, Quantity, Weight, Volume
- Ship Confirm Rule. Options: List contains all Ship Confirm rules defined for the organization.
- Weight UOM Class. Options: List contains all Weight UOM classes defined for the organization.
- Volume UOM Class. Options: List contains all Volume UOM classes defined for the organization.
- Currency. Options: List contains all currencies defined for the organization.
- Inventory Interface Batch Size: You can enter the number of records to select for processing in a batch in Oracle Fusion Inventory Management.
- Shipment Set Behavior. Options: Error, Warning, Information
- Automatically Pack (check box): You can automatically pack at pick confirmation.
- Consolidate Backordered Lines (check box): You can consolidate a backordered shipping line with other backordered lines belonging to the same source order line.
- Enforce Packing (check box): You can enforce that lines are packed prior to ship confirmation.
- Enforce Shipping Method (check box): You can enforce that a shipping method (carrier, mode, service level) is entered and recorded for each shipment.
- Allow Future Ship Date (check box): You can allow the warehouse manager to enter a future date as the actual ship date when confirming the shipment.
- Defer Sending Inventory Updates to Integrated Applications (check box): You can defer shipping interfaces from initiating updates to Order Management and inventory interface tables.
- Enable Carrier Manifesting (check box): You can send open shipments with assigned lines that are staged and packed for ship confirmation in the carrier manifesting system. Packing occurs before manifesting because only packed lines are manifested.
- Defer Online Processing of Inventory Updates (check box): You can delay processing of records in Oracle Fusion Inventory Management.
- Required on Packing Slip: You can select the details you want to display on the packing slip by selecting individual options or selecting All.

Pick Release Parameters

This section explains some of the pick release parameters.

- Release Sequence Rule: You can select your organization's preference of the order in which lines are allocated during pick release. You can select the most frequently used release sequence rule from the choice list as the default rule, and you can change it any time during pick release submission.
- Pick Slip Grouping Rule: You can select your organization's preferred method of grouping lines onto pick slips and generating the pick slip number during pick release. You can select the most frequently used Pick Slip Grouping Rule from the choice list as the default rule, and you can change it any time during pick release submission.
- Print Pick Slip. Options: At the end, Immediate
- Number of Pick Slip Lines: You can enter the number of lines your organization wants to print on a pick slip.

- Staging Subinventory and Staging Locator: You can select your organization's usage of a specific subinventory and locator to deposit lines after pick confirmation. Options: List contains all subinventories and locators defined for the organization.
- Number of Pick Release Child Processes: Pick release enables multiple pick release processes to run simultaneously as child processes. You can set the default number of child processes that run during pick release in the organization.
- Pick Release Batch Size: You can enter a batch size between 3 and 1000. Any value less than 3 is interpreted as 3, and any value greater than 1000 is interpreted as 1000.
- Create Shipments (check box). When you select this check box, a shipment is created automatically and assigned to the lines that are pick released.
- Enforce Shipment Sets (check box): You can enable to ensure that all lines in a shipment set are shipped together.
- Express Pick (check box): You can enable the Express Pick check box if you prefer the pick release process to skip both creating order lines and automatically confirming picks. Note the following:
  - To enable this check box, you must select the Prior Reservations Only and Autoconfirm Picks check boxes.
  - No pick slips can be generated for lines processed as part of Express Pick.
  - The subinventory where the reservation is created prior to pick release is used for the staging subinventory.

Optional Shipment Grouping Attributes

1. Show optional shipment grouping attributes (in addition to required attributes Ship-from Organization and Ship-to Location), to group shipment lines on to shipments during the autocreate shipments activity.
   - Shipping Method
   - FOB
   - Freight Terms
   - Customer
2. When you finish reviewing shipping parameters, click **Cancel** on the **Manage Shipping Parameters** page.

Demo Complete

You have introduced shipping parameters.

Practice for Lesson 26: Shipping Orders

Practice 26-1: Creating a Carrier

Overview

In this practice, you'll learn how to create a carrier. In this scenario, you're a warehouse manager who needs to set up a carrier for your organization. In this activity, you go through the steps to create a new carrier and assign that carrier to an organization. You must set up each carrier's information before you assign it to a shipment.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to Setup and Maintenance
- Navigate to the Manage Carriers page
- Create a New Carrier
- Assign the Carrier to an Organization
- Enter the Contact Information for the Carrier

Tasks

Navigating to Setup and Maintenance

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.

Navigating to the Manage Carriers Page

2. In the **Setup and Maintenance** work area, select the Manufacturing and Supply Chain Materials Management offering.
3. Select the **Carriers and Transit Times** functional area.
4. Select the **Manage Carriers** task.

Creating a New Carrier

5. On the **Manage Carriers** page, click the **Create** icon or select **Create** from the **Actions** menu.
6. On the **Create Carrier** page, enter this carrier name: `XX-Carrier`. Select the **Active** check box.
7. In the **Shipping Methods** tab, click the **Add Row** icon.
8. In the **Service Level** list, select 2nd day air

9. In the **Mode of Transport** list, select Air. After you enter a service level and mode of transport, your entries appear in the title of the **Organization Associations** table below.
10. Click **Save**.

Assigning the Carrier to an Organization

11. In the **Organization Associations** area, click the **Select and Add** icon or select **Select and Add** from the **Actions** menu.
12. In the **Select and Add: Organizations** dialog box, in the **Organization** field, enter this organization code: `001`. Then click **Search**.
13. The 001 and Seattle appear in the table. Select the organization, and then click **OK**.

Entering the Contact Information for the Carrier

14. On the **Create Carrier** page, click the **Contacts** tab.
15. Click the **Create** icon or select **Create** from the **Actions** menu.
16. In the **Create Contact** dialog box, enter any contact information you like in the fields. Only **Last Name** is required.
17. Click **OK**.
18. On the **Create Carrier** page, click **Save and Close** to finish creating the carrier.

Practice Complete

You've created a carrier and associated it with an organization.

Demo for Lesson 27: Shipping Orders: Manage Pick Waves

Demo 27-1: Managing Pick Wave Release Rules

Overview

In this scenario, you are a shipping manager. Your organization has shipment lines with a status of Ready to Release. You release these shipment lines to the warehouse for picking, which in turn delivers the items to the staging location in shipping where they are ship confirmed.

You navigate to the Pick Wave work area. On the Pick Wave Overview page, you can view the current status of Pick Slips and Picks for the organization. There, you create a pick wave and release shipment lines to the warehouse for picking. You initiate a pick wave based on default picking parameters.

Prior to releasing a pick wave, you create your own sales order to process in this exercise using the steps below.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to Order Management
- Create Sales Order
- Release Pick Wave

Tasks

Navigate to Order Management

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.

Create Sales Order

2. In the **Order Management** work area, click **Create Order**.
3. On the **Create Order** page, in the **Business Unit** list, select US1 Business Unit.
4. In the **Customer** list, select Computer Service and Rentals.
5. In the **Select Item** field, enter: `AS46334`. Then tab out of the field. Information about the item appears automatically.
6. Click **Add**. Order Management creates an order line for that item, and the line appears in the **Order Lines** table.
7. Click the **Shipment Details** tab.
8. Click the **Supply** tab.
9. In the **Warehouse** field, select 001 - Seattle.
10. Click **Submit**.

11. A **Confirmation** message appears confirming the action. Note the sales order number, and then click **OK**.

12. The **Order: Computer Service and Rentals - <Sales Order Number> - Processing** page appears. If you didn't note the sales order number in the previous step, you can do so now.

13. Click **Done**.

Release Pick Wave

Navigate to the Create Pick Wave Page

14. From the **Navigator**, select **Supply Chain Execution**, and then click **Inventory Management**.
15. In the **Inventory Management** work area, click the **Tasks** panel tab.
16. Select **Shipments** in the **Show Tasks** list.
17. Select **Create Pick Wave**.

Release a Pick Wave

18. On the **Create Pick Wave** page, in the **Release Rule** list, select 001-Auto Pick Conf.
19. In the **Selection Criteria** area, examine the information that is available, such as ship-from organization, order type, order, customer, and so on.
20. In the **Order Type** list, select Sales order.
21. Click the arrow next to the **Order** field and then select **Search**.
22. In the **Search and Select: Order** dialog box, enter the sales order that you created earlier in this demonstration in the **Source Order** field and then click **Search**.
23. Select the order and then click **OK**.
24. On the **Create Pick Wave** page, click the **Show More** link beside the **Selection Criteria** title.
25. In the **Demand Selection** tab, examine the information that is available, such as shipment set, shipping priority, and so on.
26. Click the **Options** tab, and then examine the information that is available, such as fulfillment, processing, and so on.
27. Click **Release Now**.
28. In the **Confirmation** message, click **OK**. Wait for the application to finish processing.

Demo Complete

You released a pick wave.

Practice for Lesson 27: Shipping Orders

Practice 27-1: Creating a Pick Wave for a Single Order

Overview

You are a warehouse manager who needs to create and release a pick wave for an order in your warehouse.

You can create a pick wave based on many different criteria and process options. In this practice, you follow the steps to create a pick wave that result in pick releasing a single order. At the end, you see the shipment line status go from “Ready to Release” to “Staged.”

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Create Sales Order
- Navigate to the Create Pick Wave Page
- Create a Pick Wave
- Verify that the Application Released and Staged the Pick Wave

Tasks

Create Sales Order

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.
2. Click **Create Order**.
3. On the **Create Order** page, in the **Business Unit** list, select US1 Business Unit.
4. In the **Customer** list, select Computer Service and Rentals.
5. In the **Select Item** field, enter: `AS46334`. Then tab out of the field. Information about the item appears automatically.
6. Click **Add**. Order Management creates an order line for that item, and the line appears in the **Order Lines** table.
7. Click the **Shipment Details** tab.
8. Click the **Supply** tab.
9. In the **Warehouse** field, select 001 - Seattle.
10. Click **Submit**.
11. A message appears confirming the action. Note the sales order number and then click **OK**.
12. The **Order: Computer Service and Rentals - <Sales Order Number> - Processing** page appears. If you didn’t note the sales order number in the previous step, you can do so now.
13. Click **Done**.

Navigate to the Create Pick Wave Page

14. From the **Navigator**, select **Supply Chain Execution**, and then click **Inventory Management**.
15. On the **Inventory Management** page, click the **Tasks** panel tab. Then, in the **Show Tasks** list, select **Picks**.
16. Select **Create Pick Wave**.

Create a Pick Wave

17. On the **Create Pick Wave** page, click **Change Organization.** Select organization 001, if it isn't selected already, and then click **OK**.
18. In the **Release Rule** list, select 001- Auto Pick Conf.
19. In the **Selection Criteria** section, select and enter additional criteria to further refine the criteria for the lines to pick release as follows:

Field	Value
Ship-From Organization	This value defaults according to the organization that you chose when you logged in.
Order Type	Sales Order
Order	Your Sales Order

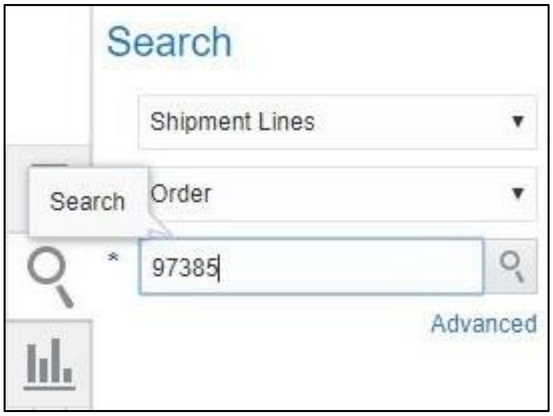
20. Click the **Show More** link next to **Selection Criteria**.
21. Click the **Options** tab under **Selection Criteria**.
22. Make sure that the **Autoconfirm Picks** option is enabled.
23. Click the **Release Now** button.
24. In the **Confirmation** dialog box, click **OK**.

Verify that the Application Released and Staged the Pick Wave

25. From the **Navigator**, click **Tools**, and then select **Scheduled Processes**.
26. On the **Overview** page, the scheduled processes show the Print Pick Slip Report. Verify the program has a status of Succeeded. You may need to click the Refresh icon.
27. View the Print Pick Slip Report by selecting the report in the search results table and then clicking the output name. The pick status on the report should be Confirmed. You can see the pick slip at the end of this practice.
28. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.

29. In the **Inventory Management** work area, click the **Quick Search** panel tab on the right side of the page.

30. Select Shipments and Order. Enter your order number. Then click the Search icon.



31. The **Edit Shipment Line** page shows your order. Make sure that the **Line Status** contains a value of Staged.

Practice Complete

You’ve created a pick wave.

ORACLE

Pick Slip

Date 5/21/19 10:42 PM
Page 1 of 1

Ship-from Organization			
001 Seattle			
Pick Slip	153543	Pick Wave	208895
Pick Slip Grouping Rule	Order Picking		

Customer	Shipment	Sales Order	98355
Computer Service and Rentals	40195	Shipping Priority	
Ship-to Location		Carrier	
301 E Summit Hill Dr Knoxville, TN 37915, United States		Subinventory	
		Requisition	

Pick-from Subinventory	Staging Subinventory	Staging Locator	
Stores	Staging		

Movement Request
208895

Pick Line	Pick Status	Movement Request Line	Item Revision	Sales Order Pick-from Locator	Sales Order Line Requested Quantity UOM	Shipment Set Requested Quantity	Shipment Shipped Quantity
1	Confirmed	1	AS46334 Vario 5000 Tablet	98355	1		40195
					Ea	1	

Shipping Instructions

Practice for Lesson 28: Shipping Orders

Practice 28-1: Confirming a Pick Slip

Overview

You're a warehouse manager who needs to confirm pick slips for shipment lines released for an order in your warehouse. In this scenario, a previously created pick wave doesn't have the option to confirm picks automatically selected for this pick wave. Therefore, you must manually pick confirm the pick slips for this pick wave.

In this practice, you'll follow the steps to confirm a pick slip after it's pick released. You see the shipment line status go from "Released to warehouse" to "Staged."

Before you confirm a pick slip, you must create a sales order using the steps provided below.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigating to Order Management Work Area
- Create a Pick Wave
- Release a Pick Wave
- Navigate to the Confirm Picks Page
- Confirm the Pick Slip
- Verify the Line Is Staged

Tasks

Navigating to Order Management Work Area

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.
2. On the **Overview** page, click **Create Order**.
3. On the **Create Order** page, select US1 Business Unit.
4. In the **Customer** field, enter: `Computer Service and Rentals`
5. In the **Select Item** field, enter: `AS46334`. Then, tab out of the field. The item information appears.
6. Click **Add**. A new order line for that item appears in the **Order Lines** table.
7. Click the **Shipment Details** tab.
8. Click the **Supply** tab.
9. In the **Warehouse** field, select 001.
10. Click **Submit**.

11. Note the sales order number in the **Confirmation** dialog box, and then click **OK**.
12. The order number appears at the top of the page. Click **Done**.

Create a Pick Wave

13. From the **Navigator**, select **Supply Chain Execution**, and then click **Inventory Management**.
14. In the **Inventory Management** work area, click the **Tasks** panel tab on the right side of the page, and then select **Picks** in the **Show Tasks** list. Select **Create Pick Wave**.

Release a Pick Wave

15. On the **Create Pick Wave** page, in the **Release Rule** list, select 001-Man. Pick Conf.
16. In the **Selection Criteria** area, take a look at the information that's available, such as ship-from organization, order type, order, customer, and so on.
17. In the **Order Type** field, select Sales order.
18. In the **Order** field, enter your sales order.
19. Click **Release Now**.
20. A **Confirmation** message appears containing a pick wave number and the number of pick slips in the pick wave that was released. Click **OK.**

Navigate to the Confirm Picks Page

21. From the **Navigator**, select **Supply Chain Execution**, and then click **Inventory Management**.
22. Click the **Tasks** panel tab, and then select **Picks** in the **Show Tasks** list. Select **Confirm Pick Slips**.

Confirm the Pick Slip

23. On the **Confirm Pick Slip: Search** page, enter your sales order in the **Order** field, delete the due date, and then click **Search**. It may take a few minutes for the pick slip to appear.
24. In the **Pick Slip** column, select the **Pick Slip** link associated with your order.
25. On the **Confirm Pick Slip** page, make sure the picked quantity is equal to the value in the **Requested Quantity** field.
26. To select the lines to pick confirm, select the **Ready to Confirm** check box.
27. The following UI experiences are available when pick confirming a line:
    - Clicking **Confirm** confirms the pick. Shipping dynamically removes the line from the page, and the page remains open so that you can confirm another pick.
    - **Confirm and Go to Ship Confirm**. When you click **Confirm**, Shipping confirms the pick, stages the line, and opens the **Shipments** page, where you can ship confirm the selected line.
    - **Confirm and Close**. Confirms the pick, the user interface is closed, and navigation brings you back to the **Pick Slips** work area.

    Click the arrow next to **Confirm**, and then select **Confirm and Go to Ship Confirm**.

Verify the Line Is Staged

28. On the **Edit Shipment: XXXX** page, verify the **Line Status** column in the **Lines** table contains a value of Staged.

Item	Order	Order Type	Line Status	Quantity UOM	Requested Quantity	Shipped Quantity	Backordered Quantity	Shipping Method
AS46334	98356	Sales order	Staged	Ea	1			DHL-Air-Next d...

29. Click View, select Columns, Summary, and then UOM Conversions. Click the **UOM Conversions** icon . to view different units of measure that are set up for an item in inventory transactions. With UOM conversions, you can order items in one unit of measure, and convert and fulfill the items in a different unit of measure.
30. Click the arrow next to the **Save** button, and then select **Save and Close**.

Practice Complete

You've confirmed a pick slip.

Practice for Lesson 29: Shipping Orders

Practice 29-1: Confirming Shipments

Overview

Shipment lines were pick released, and the status of the lines is staged. The lines are now ready for shipment confirmation. In this practice, you'll search for shipment lines by order number and perform the ship confirm operation on the shipment that the line is assigned to.

You're a warehouse manager who needs to ship confirm the lines for a particular order and set up a carrier for your organization.

Prerequisites

Practice 28-1

User Login

scmXX.student (XX is the student number assigned to you)

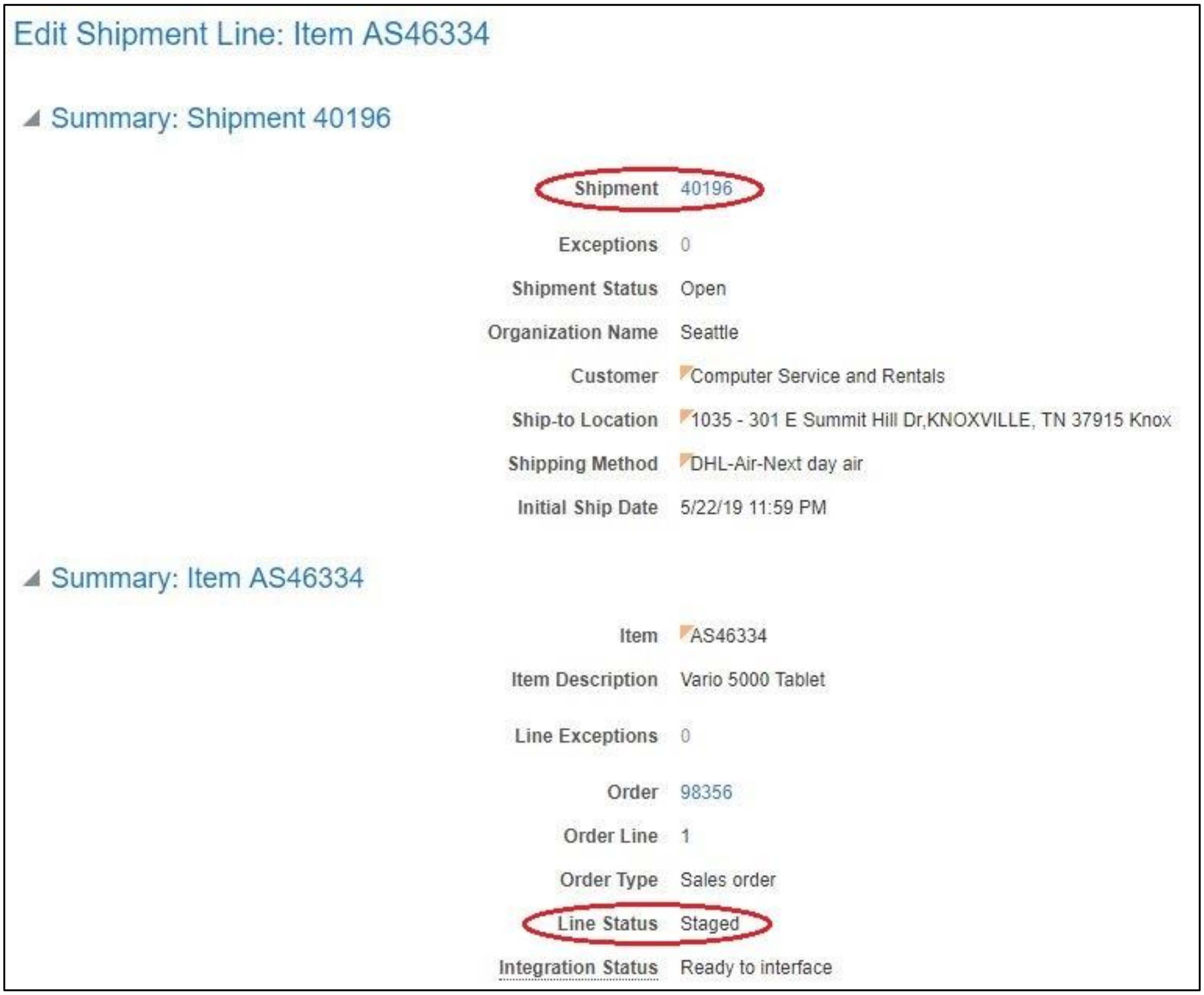
Summary of Tasks

- Locate Your Shipment
- Confirm the Shipment

Tasks

Locate Your Shipment

1. From the **Navigator**, select **Supply Chain Execution**, and then click **Inventory Management**.
2. In the **Inventory Management** work area, and then click the **Tasks** panel tab on the right side of the page.
3. Select **Shipments**, and then select **Manage Shipment Lines**.
4. On the **Manage Shipment Lines** page, in the empty **Order** field next to Equals**,** enter the number of the order you created in practice 28-1.
5. In the **Scheduled Ship Date** field, select All Past Due. Note: If the search doesn't produce any results, then select "Today and the past 30 days" or another value. Then, click **Search**.
6. The **Edit Shipping Line: Item AS46334** page opens if the order consists of a single line. If the order consists of multiple lines, then the **Manage Shipment Lines** page opens. Notice the Shipment link assigned to the shipment line. Verify that the Line Status contains a value of **Staged**. Click the **Shipment** link.



7. On the **Edit Shipment** page, notice that the shipment is in a state where it can be ship confirmed.

Confirm the Shipment

8. On the **Edit Shipment** page, click **Ship Confirm**.
9. In the **Confirmation** dialog box, click **OK**.

Practice Complete

You've confirmed a shipment.

Demo for Lesson 31: Setting Up Change Order Processing

Demo 31-1: Managing Order Attributes That Identify Change

Overview

Show how to add change attributes to Order Orchestration business objects. When one of these attributes is changed, it triggers compensation of the orchestration process.

You are an order administrator at Vision Corporation. You want to set up change processing so that any time a change order is submitted in which the ordered date, category code, and allow substitutions attributes are changed, compensation of the associated orchestration process is triggered.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Manage Order Attributes That Identify Change Page
- Add Order Header Attributes
- Add Order Line Attributes

Tasks

Navigate to the Manage Order Attributes That Identify Change Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select **Order Management**.
3. Search for the **Manage Order Attributes That Identify Change** task. Select the task in the **Orders** functional area.

Add Order Header Attributes

4. On the **Manage Order Attributes That Identify Change** page, in the **Search Results: Task Type** region, select the **Shipment** task type and then click the **Edit** icon. Order Fulfillment Line Attributes is selected.
5. In the **Order Fulfillment Line: Attributes** region, scroll down slowly and show all the attributes. Those with checkmarks are predefined.
6. In the **Orchestration Components** region, select Order Header.
7. In the **Order Header: Attributes** region, click the **Select and Add** icon.
8. In the **Select and Add: Change Attributes** dialog box, select Ordered Date.
9. Click **OK**. On the **Edit Order Attributes That Identify Change** page, notice that the attribute is added to the **Order Header: Attributes** region, and **Predefined** isn’t selected for this attribute.

Add Order Line Attributes

10. In the **Orchestration Components** region, select Order Line.
11. In the **Order Line: Attributes** region, click the **Select and Add** icon.
12. In the **Select and Add: Change Attributes** dialog box, select Category Code.
13. Click **OK**. On the **Edit Order Attributes That Identify Change** page, notice that the attribute is added to the **Order Line: Attributes** region, and **Predefined** isn’t selected for this attribute.
14. In the **Orchestration Components** region, select Order Fulfillment Line.
15. In the **Order Fulfillment Line: Attributes** region, click the **Select and Add** icon.
16. In the **Select and Add: Change Attributes** dialog box, select Allow Substitutions.
17. Click the **OK** button. On the **Edit Order Attributes That Identify Change** page, notice that the attribute is added to the **Order Fulfillment Line: Attributes** region, and **Predefined** isn’t selected for this attribute.
18. Click **Save and Close**.

Demo Complete

You created order attributes that identify change.

Practice for Lesson 31: Setting Up Change Order Processing

Practice 31-1: Creating a Compensation Pattern

Overview

You're an order administrator at Vision Corporation. You want to create a rule that cancels and redoes the step if the inventory item ID is changed while the process is on the Ship step. This type of rule is called a compensation pattern. It indicates what the orchestration process needs to do if a change is made to an in-progress order. In this practice, you'll create the compensation pattern on the Ship step. To create the rule, you'll construct these If and Then statements:

- If InventoryItemId is changed.
- Then, redo the Create Shipment Request step.

In this practice, you'll also learn how to revise an orchestration process definition. This isn't the only way to create a compensation pattern. You can create a compensation pattern in the first version of the orchestration process definition. In this practice, you'll create the pattern for version 2 of the process.

Prerequisites

Practice 16-2

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Steps

- Navigate to the Manage Orchestration Process Definitions Page
- Locate Your Orchestration Process Definition
- Create the If statement: If InventoryItemId is changed.
- Create the Then statement: Then redo the Create Shipment Request step

Tasks

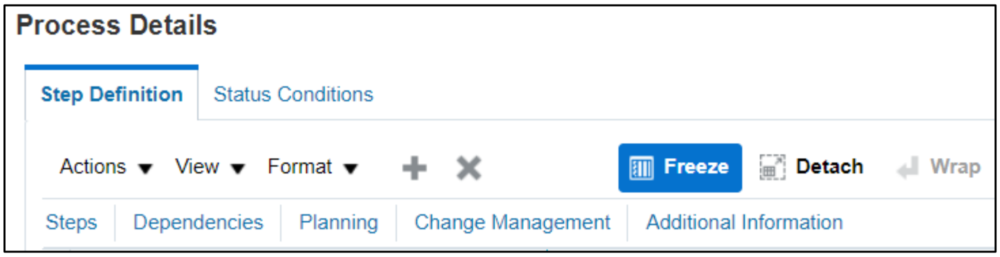
Navigate to the Manage Orchestration Process Definitions Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Orchestration Process Definitions** task. Select the task in the **Orders** functional area.

Locate Your Orchestration Process Definition

4. On the **Manage Orchestration Process Definitions** page, search for your orchestration process definition, CustomDOO_OUStandardOrdersProcessXX<first letter of last name>. This is the process that you released in an earlier practice. You're going to revise it.

5. At the top of the **Edit Orchestration Process Definition** page, click **Actions**, and then select **Revise Process**. Notice the new version number under the process name and the Edit status next to the description
6. In the **Step Definition** tab in the **Process Details** area, select the Create Shipment Request step.
7. Click the **Change Management** link.

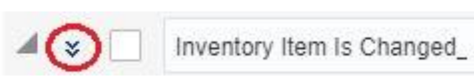


8. Scroll to the **Compensation Pattern** column.

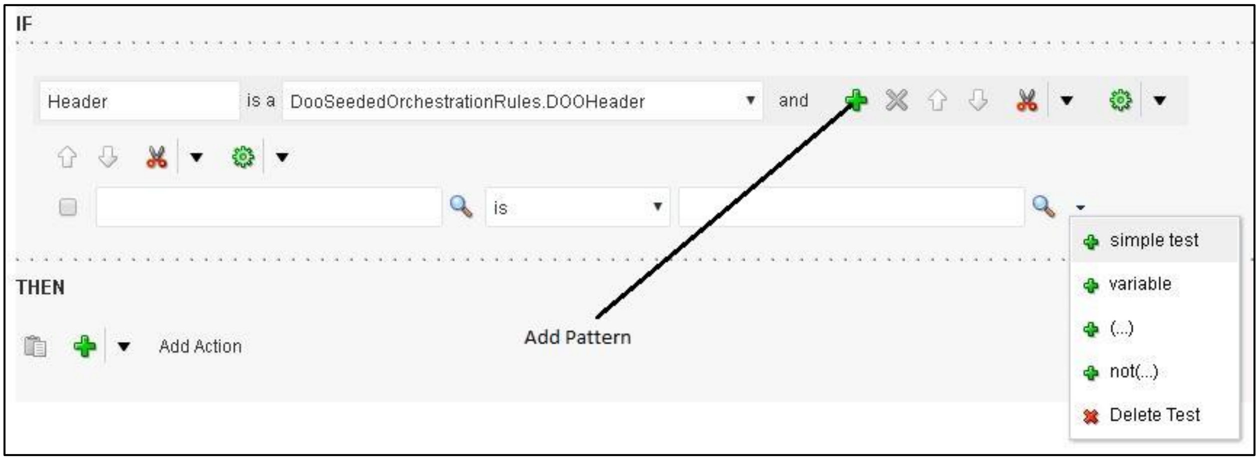
Create the If Statement: If the InventoryItemId Is Changed

9. In the **Compensation Pattern** column of the Create Shipment Request step, select the **Click for Rule** link.
10. In the **Compensation Pattern** dialog box, click the arrow next to the **Add** icon, and select **Add Rule**.

11. Replace the text “Rule 1” with the rule name: Inventory Item Is Changed_XX
12. Click the **Expand** icon.
13. Click the **Show Advanced Settings** icon.



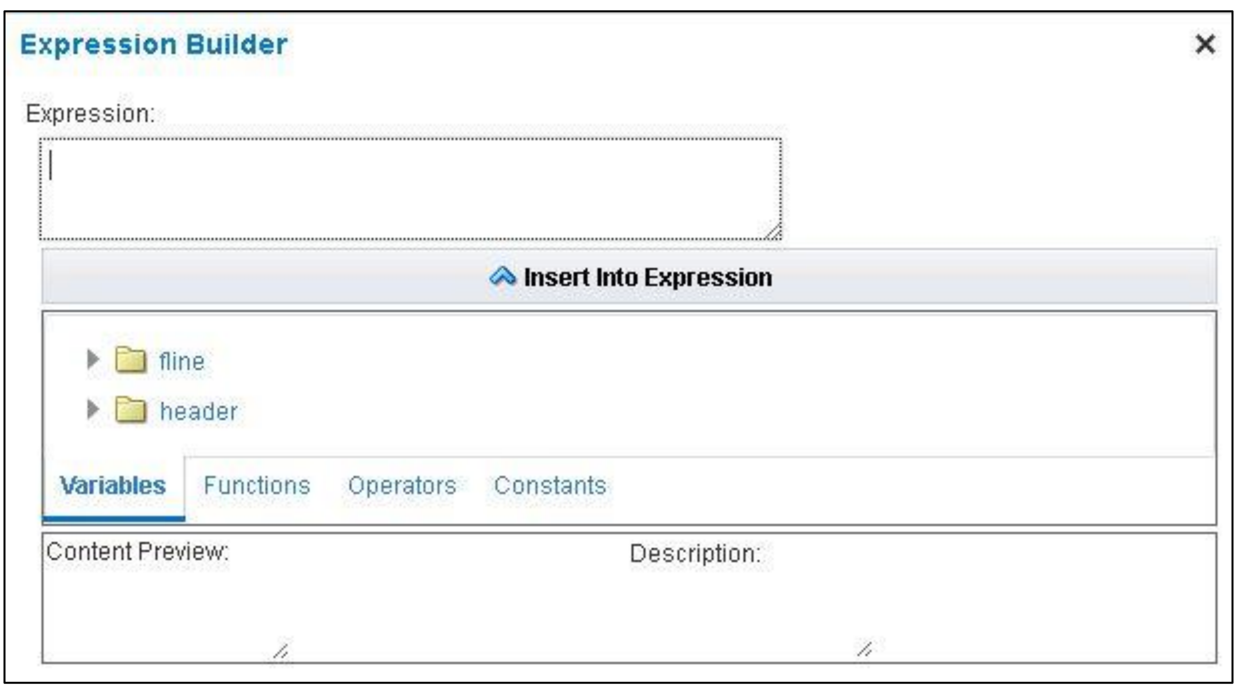
14. Select **Active, Advanced Mode,** and **Tree Mode**.
15. In **Root**, select DooSeededOrchestrationRules.DOOHeader.
16. In the IF region, in the first field on the left enter: `Header`.
17. In the list to the right of “is a”, select DooSeededOrchestrationRules.DOOHeader, if it isn’t selected already.
18. Select **Delete Test** in the row of fields below the row you just completed.



19. Click the **Add Pattern** icon on the same line as DooSeededOrchestrationRules.DOOHeader.
20. In the left field of the new row, enter: `fline`.
21. To the right of "is a," select Header/childFLines.
22. Do these fields appear below the line you just filled out?

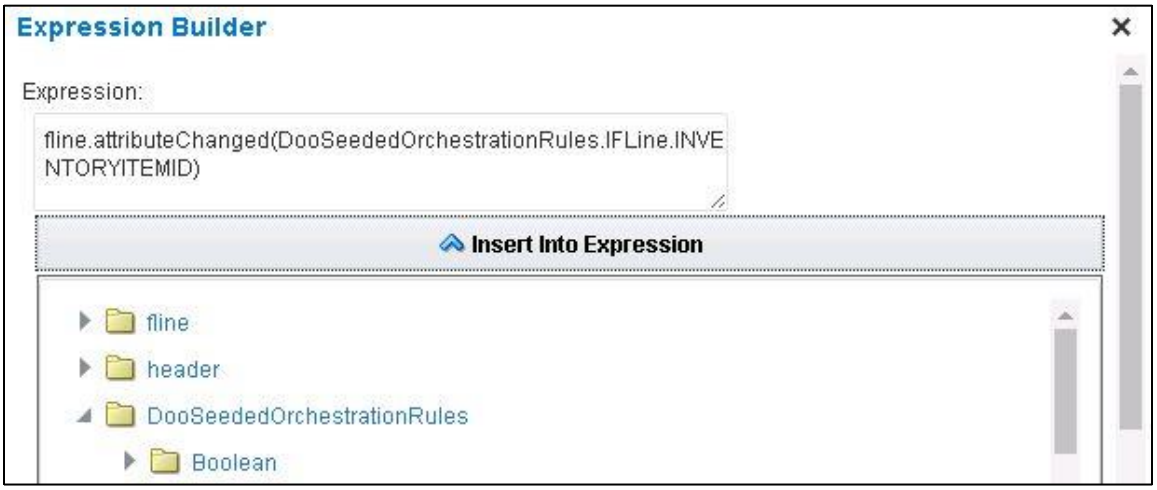
If not, then click the arrow next to **Add Test**. Select **Simple Test**.

23. Next to the left field of the new line, click the **Left Value** icon.
24. In the **Condition Browser**, click the **Expression Builder** icon next to the empty field at the top of the window.
25. Scroll to the bottom of the **Expression Builder**.



26. Scroll to the bottom of the window, and then select the **Functions** tab.

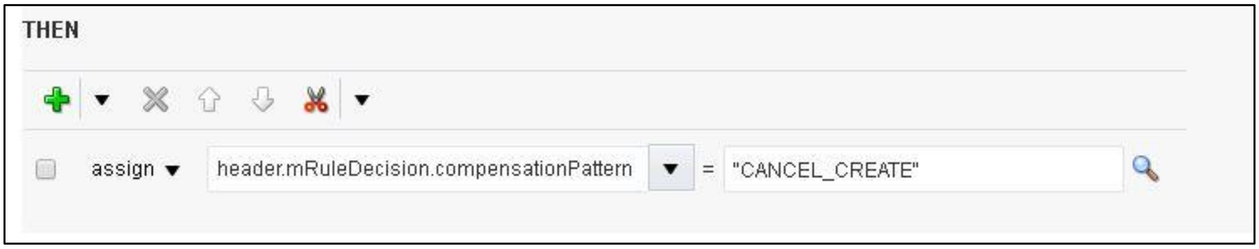
27. Open the fline folder, and then select attributeChanged(String). Make sure you see this text under Content Preview. When it appears there, click **Insert Into Expression**.
28. Scroll to the bottom of the window, and then select the **Constants** tab.
29. Expand DooSeededOrchestrationRulesand then IFLine. Then, select INVENTORYITEMID.
30. Scroll up to your expression, and then select the word String.
31. Click **Insert Into Expression**. Your expression should look like this:



32. Click **OK** to close the **Expression Builder**.
33. Click **OK** to close the **Condition Browser**.
34. In the **Compensation Pattern Set** window ensure that "is" is selected. Then, in the field next to it, enter: `true`.
35. This is how your IF statement should look:

Create the Then statement: Then Redo the Create Shipment Request Step

36. In the **Compensation Pattern** window, in the **THEN** region, click **Add Action**, and then click assign.
37. In the new field next to "assign," enter: `compensation`. From the list of options that appear, select header.mRuleDecision.compensationPattern.
38. Next to =, enter: `"CANCEL_CREATE"`. You must surround the text with quotation marks. The Then statement should look like this:



39. Click **Validate**.
40. Click **Save**.
41. On the **Edit Orchestration Process Definition** page, click **Save and Close**.

Practice Complete

You revised an orchestration process and created a compensation pattern.

Demos for Lesson 32: Managing Holds

Demo 32-1: Creating a Hold Code

Overview

You are an order administrator for Vision Corporation. You were told about a possible problem with a product. You want to create a hold code that you can use to hold all processes that are for this product, while your company investigates the issue.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Manage Hold Codes Page
- Create a Hold Code

Tasks

Navigate to the Manage Hold Codes Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, select the **Order Management** offering.
3. Search for the **Manage Hold Codes** task. Select the task in the **Orders** functional area.

Create a Hold Code

4. On the **Manage Hold Definitions** page, click the **Add Row** icon.
5. In the **Code** field, enter: `HOLD_PRODUCT_ISSUE`.
6. In the **Name** field, enter: `Hold Pending Product Investigation`.
7. In the **Description** field, enter: `Hold pending investigation of product issue`.
8. Select the **Hold All Services** check box.
9. In the **Set** list, select COMMON (Common Set).
10. Click **Save**.
11. Because you selected **Hold All Services**, you don't need to add individual services to hold in the **Hold Pending Product Investigation: Details** area. Show that the **Search and Select: Node** icon is disabled.
12. Clear the **Hold All Services** check box.
13. In the **Hold Pending Product Investigation: Services** region, click the **Search and Select**: **Node** icon to show that you can now select individual services to hold.
14. In the **Select and Add: Services** dialog box, in the **Code** field, enter: `DOO_CREATE`. Then click **Search**.

15. Select DOO_Create_Scheduling, and then click **OK**.
16. On the **Manage Hold Definitions** page, click **Cancel**.

Demo Complete

You created a hold code.

Demo 32-2: Creating a Hold Release Reason

Overview

You are an order administrator at Vision Corporation. The company suspected a product defect, so all orders with this product were put on hold. The issue was investigated, and no defect was found. You want to create a hold release reason that explains that the hold is being released because the product is defect-free. You must create a lookup code that you can select from the Order Orchestration work area when you release the hold.

Prerequisites

None

User Login

scm00.Instructor

Summary of Tasks

- Navigate to the Manage Order Lookups Page
- Create a Hold Release Reason

Tasks

Navigate to the Manage Order Lookups Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, select the **Order Management** offering.
3. Search for the **Manage Order Lookups** task. Select the task in the **Orders** functional area.

Create a Hold Release Reason

4. In the **Lookup Type** field on the **Manage Order Lookups** page, enter: `DOO`.
5. Click the **Search** button.
6. Select DOO_HLD_RELEASE_REASON.
7. In the **DOO_HLD_RELEASE_REASON: Lookup Codes** region, click the **New** icon.
8. In the **Lookup Code** field, enter: `DOO_HLDREL_PRODUCT_OK`.
9. In the **Display Sequence** field, enter: `1`. Leave **Enabled** selected.
10. In the **Start Date** field, select today's date.
11. In the **End Date** field, select the date one week from today.
12. In the **Meaning** field, enter: `Product Problem Cleared`.
13. In the **Description** field, enter: `Possible problem with product cleared`.

14. Click **Save and Close**.

Demo Complete

You created a hold release reason.

Practices for Lesson 33: Understanding External Integration

Practice 33-1: Registering Connectors

Overview

Your company, Vision Corporation, has several legacy shipping applications. These systems are external, that is, they aren't Oracle Fusion applications. You must enable integration between Oracle Fusion Order Management and the external application by creating, deploying, and registering a connector for each external application. Your IT department creates and deploys the connector. You register the connector on the Manage Web Service Details page.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage Trading Community Source Systems Page
- Define the Source System
- Manage the Planning Source System
- Navigate to the Manage External Interface Web Service Details Page
- Register the Connector

Tasks

Navigate to the Manage Trading Community Source Systems Page

1. In the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. On the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Trading Community Source Systems** task. Select the task in the **Customers** functional area.

Define the Source System

4. On the **Manage Trading Community Source Systems** page, in the **Search Results** area, click the **Create** icon.
5. Set the following parameters:

Field	Value
Code	CSSXX
Name	CSS Source XX
Type	Spoke
Enable for Order Orchestration and Planning	Selected

6. Click **Save and Close**.
7. On the **Manage Trading Community Source Systems** page, click **Done**.

Manage the Planning Source System

8. In the **Setup and Maintenance** work area, select the **Supply Chain Planning** offering.
9. Search for the **Manage Planning Source Systems** task. Select the task in the **Supply Chain Planning Configuration** functional area.
10. On the **Manage Planning Source Systems** page, in the **Source Systems** table, click the **Create** icon.
11. In the **Create Source System** dialog box, select:
12.

Field	Value
Code	CSSXX
Time Zone	US Central Time
Version	Others
Order Orchestration Type	Fulfillment
Collections allowed	Selected
Enable data cross-reference	Selected

13. Click **Save and Close**.
14. On the **Manage Planning Source Systems** page, click **Done**.

Navigate to the Manage External Interface Web Service Details Page

15. On the **Setup and Maintenance** work area, select the **Order Management** offering.
16. Search for the **Manage External Interface Web Service Details** task. Select the task in the **Orders** functional area.

Register the Connector

17. On the **Manage Connector Details** page, click **Actions**, and then select **Add Row**.
18. In the new row, select or enter:

Field	Value
Target System	CSSXX
Connector Name	ConnectorXX
Connector URL	http://servername.com:1234/soa (This is a fictitious URL. There is no deployed connector.)
Connector Description	Connector for target system CSSXX

19. Click **Save**.

20. Click **Actions**, and then click **Add Row**.
21. In the new row, select or enter:

Field	Value
Target System	CSSXX
Connector Name	EventConnectorXX
Connector URL	http://servername.com:1234/soa (This is a fictitious URL. There is no deployed connector.)
Connector Description	Business event listener service for CSSXX

22. Click **Save and Close**.

Practice Complete

You registered connectors

Practice 33-2: Setting Up a Jeopardy Business Event for a Channel System

Overview

You're an order administrator for Vision Corporation. You work with a distributor, who sends orders in bulk every night. If orders for this distributor are delayed, then you must notify that distributor. You need to perform the setup to relay the Jeopardy business event to the connector corresponding to the channel system EventConnectorXX when the jeopardy priority becomes High.

Prerequisites

Practice 33-1

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage Business Event Trigger Points Page
- Setup the Jeopardy Business Event

Tasks

In this activity, you'll enable the Jeopardy business event and create an association between this event and the connector for the channel system where the web service deployed is capable of consuming the business event.

Navigate to the Manage Business Event Trigger Points Page

1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage Business Event Trigger Points** task. Select the task in the **Orders** functional area.

Setup the Jeopardy Business Event

4. On the **Manage Business Event Trigger Points** page, select the **Active** check box in the **Jeopardy** row.
5. In the **Jeopardy: Details** area, select the **Raise Event** check box in the **High** row.
6. Click the **Associated Connectors** tab.
7. Click **Actions**, and then click **Add Row**.
8. In the **Connector Name** list, select EventConnectorXX. You may need to search for it.
9. On the **Manage Business Event Trigger Points** page, click **Save and Close**.

Practice Complete

You have enabled the Jeopardy business event. As a result, Order Management raises an event when the jeopardy priority value is High, and sends an event notification to EventConnectorXX.

Practice 33-3: Creating External Interface Routing Rules in Visual Information Builder

Overview

You are an order administrator for Vision Corporation. You need to create a rule that routes a request to the Oracle Fusion Receivables system if the request contains item CM50008 and a task type code of invoice.

This type of rule is called an external interface routing rule.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Manage External Interface Routing Rules Page
- Create a New Rule

Tasks

Navigate to the Manage External Interface Routing Rules Page

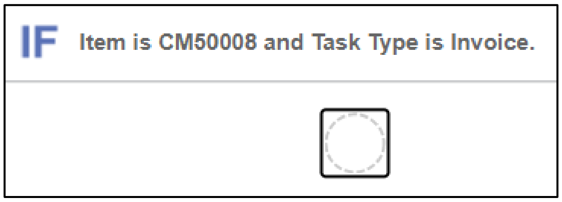
1. From the **Navigator**, select **Others**, and then click **Setup and Maintenance**.
2. In the **Setup and Maintenance** work area, select the **Order Management** offering.
3. Search for the **Manage External Integration Routing Rules for Sales Orders** task. Select the task in the **Orders** functional area.

Create a New Rule

In this section, you create the following rule: If item is CM50008, then route the request to the Oracle Fusion Receivables system.

Create the If Statement

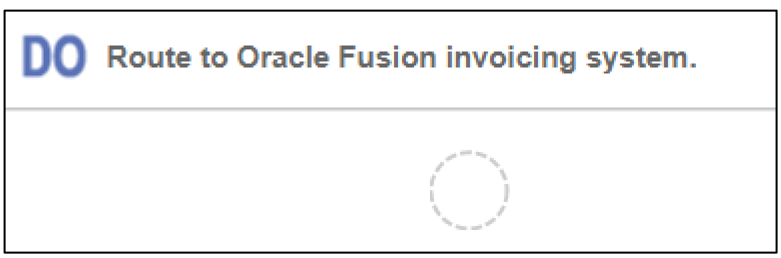
4. On the **Manage External Interface Routing Rules** page, click **Create New Rule**.
5. Replace "New Rule" with: `Route Invoice Request XX`.
6. Next to **IF**, click **Enter Description**.
7. In the **Enter Description** dialog box, enter: `Item is CM50008 and Task Type is Invoice`. Then click **OK**.
8. Click the **New Condition** icon.



9. In the **Create Condition** dialog box, enter: `Item`. Select Item (Order Fulfill Line).
10. Make sure that = is selected in the field below.
11. Click the **Search** icon.
12. In the **Search** dialog box, enter: `CM50008`. Then click **Search**.
13. Select the item, and then click **OK**. Close the **Create Condition** dialog box.
14. Click the **AND** icon.
15. In the **Create Condition** dialog box, enter: `Task`. Select Task Type (Order Header).
16. Make sure “Is equal to” is selected.
17. Click the **Search** icon.
18. In the **Search** dialog box, enter: `Invoice`. Then click **Search**.
19. Select Invoice. Then click **OK**.
20. Click **OK** to close the **Create Condition** dialog box.

Create the Then Statement

21. Click the **Then** icon and then select **DO**.
22. Click **Enter Description**. In the **Enter Description** dialog box, enter: `Route to Oracle Fusion invoicing system`. Then click **OK**.
23. Click the **New Action** icon, and select Perform an action.



24. In the **Create Action** dialog box, select the action called Set Connector Name.
25. Under **Connector** name, click the **Search** icon.
26. In the **Search** dialog box, search for Connector to Oracle Fusion Receivables system. Then click **OK**.
27. Click **OK** to close the **Create Action** dialog box.
28. Click **Save and Close**.

Practice Complete

You created an external interface routing rule.

Practices for Lesson 34: Conclusion

Practice 34-1: Creating and Submitting a Sales Order for a Standard Item

Overview

In this practice, you'll create and submit a new sales order with a standard item and coverage.

Prerequisites

None

User Login

scmXX.student (XX is the student number assigned to you)

Summary of Tasks

- Navigate to the Order Management Overview Page
- Create a New Order with a Standard Item

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.

Create a New Order with a Standard Item and Coverage

Order Header

2. On the **Overview** page, click **Create Order**.
3. On the **Create Order** page, select the US1 Business Unit.
4. In the **Customer** field, enter: `Computer Service and Rentals`. Additional fields appear automatically.
5. Click the **Sales Credits** icon.
6. In the **Manage Sales Credits** dialog box, in the **Salesperson** field, enter: `Lisa Jones`
7. In the **Revenue Percentage** field, enter: `50`
8. Click the **Add Row** icon to add another salesperson.
9. In the **Salesperson** field, enter: `Ralph Ambers`
10. In the **Revenue Percentage** field, enter: `50`
11. Click **OK.**
12. In the **Actions** menu at the top of the page, select **View Pricing Strategy and Segment**. Click **Done** after you finish viewing the information in this dialog box.

Items, Price and Availability

13. In the **Select Item** field, select AS46336. Then tab out of the field.
14. View the price.

15. In the **Quantity** field, override the existing value and enter: `15`
16. Click the linked number next to **Sale Price**.
17. In the **Your Price: Sale Price** dialog box, view the discount for the item based on quantity.
18. Click **Done** to close the dialog box.
19. Click **Add.**
20. In the **Select Item** field, enter: `EW0002-R`. Then tab out of the field. The duration and duration period appear as 2 Year.
21. Click **Select Covered Item**.
22. In the **Select Covered Item** dialog box, click the arrow next to the **Order Line** field and then select AS46336 as the covered product line.
23. Select a contract start date in the future.
24. Click **Add** to add the item to the order. Note that the line number of the warranty is 1.1, and text below the item name indicates that it covers AS46336 on line 1.
25. Click the **Edit** icon next to Your Price for the tablets. If the charge is enabled for manual adjustments, then the icon appears next to the charge.
26. In the **Edit Sale Price** dialog box, select "Discount percent" under Type. In the **Amount** field, enter: `10`. Select "Sales negotiation" as the reason. This is the manual price adjustment.
27. View manual discount in the price breakdown after applying the discount.
28. Click **Save and Close**.

Shipment Details

29. Click the **Shipment Details** tab.
30. In the **Requested Date** field, enter a future date different from the defaulted date.
31. In the **Shipping Method** field, enter: `DHL`. Select DHL Air Next Day Air.
32. Click the **Estimate Order Availability** button. Ensure that the items are still available as of the requested date.
33. Click **Save**. An order number is created and displayed. Record this number for use in future steps: __________.

Billing Details

34. Click the **Billing and Payment Details** tab. Evelyn Duncan appears as the bill-to contact by default.
35. In the **Bill-to Contact Method** field, select an email.
36. In the **Payment Term** field, select 30 Net.
37. Click **Save**.

Tax Determinants

38. Click the **Lines** tab.
39. In the line-level **Actions** menu (arrow next to **Amount**), select **Edit Tax Determinants**.
40. In the **Edit Tax Determinants** dialog box, view the defaulted tax determinants values, and then click **OK** to close the dialog box.

Create Order Report

41. In the page-level **Actions** menu, select **Create Document** and then **View**.
42. View the document, and then click **Done** at the bottom of the page.

Order Total and Submit

43. Click the **Total** value field at the top of the page. 

44. View the values in the **Total** dialog box, and then click **Done** to close the dialog box.
45. Click **Submit**. When you click Submit, you trigger approval of the manual price adjustment. The application also initiates a credit check on the customer account and provides a credit check authorization number. This number appears on the billing request that the application sends to Oracle Receivables.
46. In the **Confirmation** dialog box, click **OK**.
47. Refresh the **Order** page. Check the status.
48. Click **Done**.

Practice Complete

You've created and submitted a sales order for a standard item with coverage.

Practice 34-2: Viewing Fulfillment Lines and Orchestration Plan

Overview

In this practice, you'll search for an existing order, navigate to the fulfillment view, and check the orchestration plan for the lines on an order.

Prerequisites

Practice 34-1

User Login

scmXX.student (XX is the student number assigned to you)

Tasks

Navigate to the Order Management Overview Page

1. From the **Navigator**, select **Order Management**, and then click **Order Management**.
2. On the **Overview** page, in the **Search** field, enter the order number for the order you created during practice 34-1. Then, click the **Search** icon.
3. On the **Order** page, view the order information. The word "Processing" appears in the title of the page.
4. In the **Actions** menu, select **Switch to Fulfillment View**.
5. On the **Order** page, the default view displays the **Order Lines** tab. For the order you created in practice 34-1, two order lines appear.
6. Click the **Fulfillment Lines** tab. View the fulfillment status of each line.
7. Scroll to the right in the **Fulfillment Lines** table. An orchestration process number appears for each line. Click the number link for one of the fulfillment lines.
8. In the **Orchestration Process** view, you can see the orchestration plan. It displays a list of tasks in the plan and the current status of each.
9. Click **Done** three times until you return to the **Overview** page.

Practice Complete

You have searched for an existing order, navigated to the fulfillment view, and checked the orchestration plan for the lines on an order.

In addition, you can progress the order as the instructor did in the demonstration for lesson 5.