



Reducing Inventory for Sales Orders That Don't Require Picking or Shipping

Optimizing Inventory Management for B2C and Direct Fulfillment



Accelerating Order Processing and Reducing Inventory in Real-Time

Efficient inventory management is crucial for modern supply chains. For B2C sales or direct fulfillment, bypassing traditional picking and shipping can save time and resources. Oracle Fusion OM offers a feature to automatically reduce inventory for such sales orders, streamlining operations and ensuring real-time accuracy.

This guide will show you how to configure and use this functionality to enhance order processing, reduce manual tasks, and improve inventory visibility.



1- Enable the feature

Enable the Reduce Inventory When a Sales Order Doesn't Require Picking or Shipping feature.

2- Orchestrate fulfillment

Deploy the predefined orchestration process that comes with this feature.

3- Create order type

Define an order type lookup for this feature.

Configuration Steps for Automating Inventory Updates



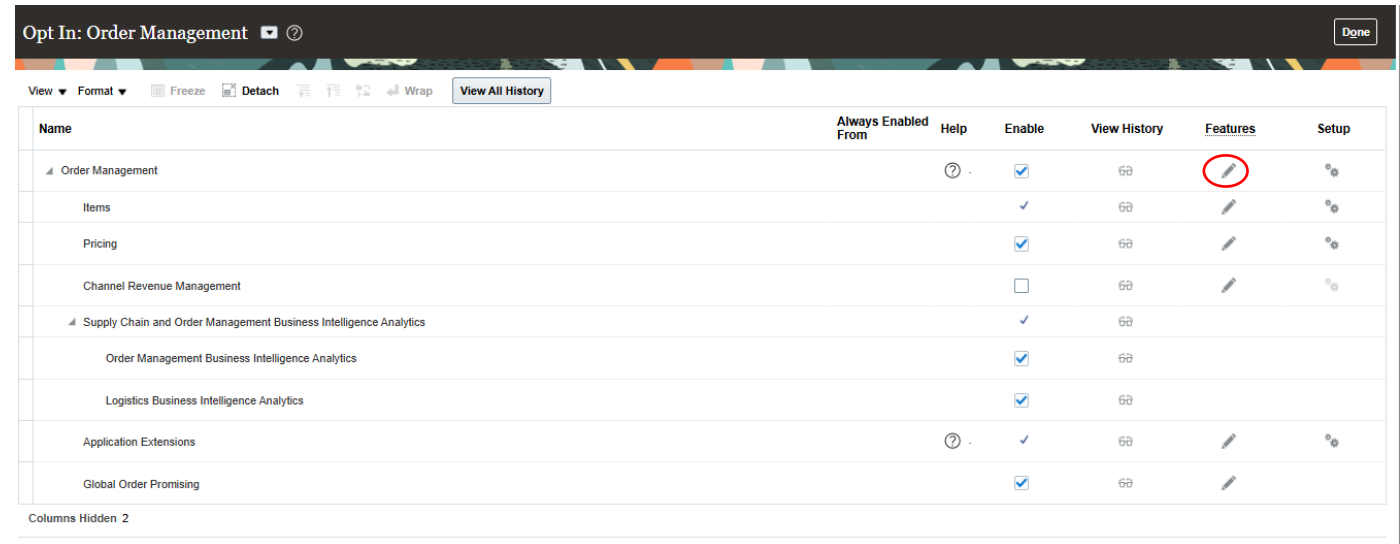
4- Manage orchestration process assignment rule







Associate the order type with the orchestration process.



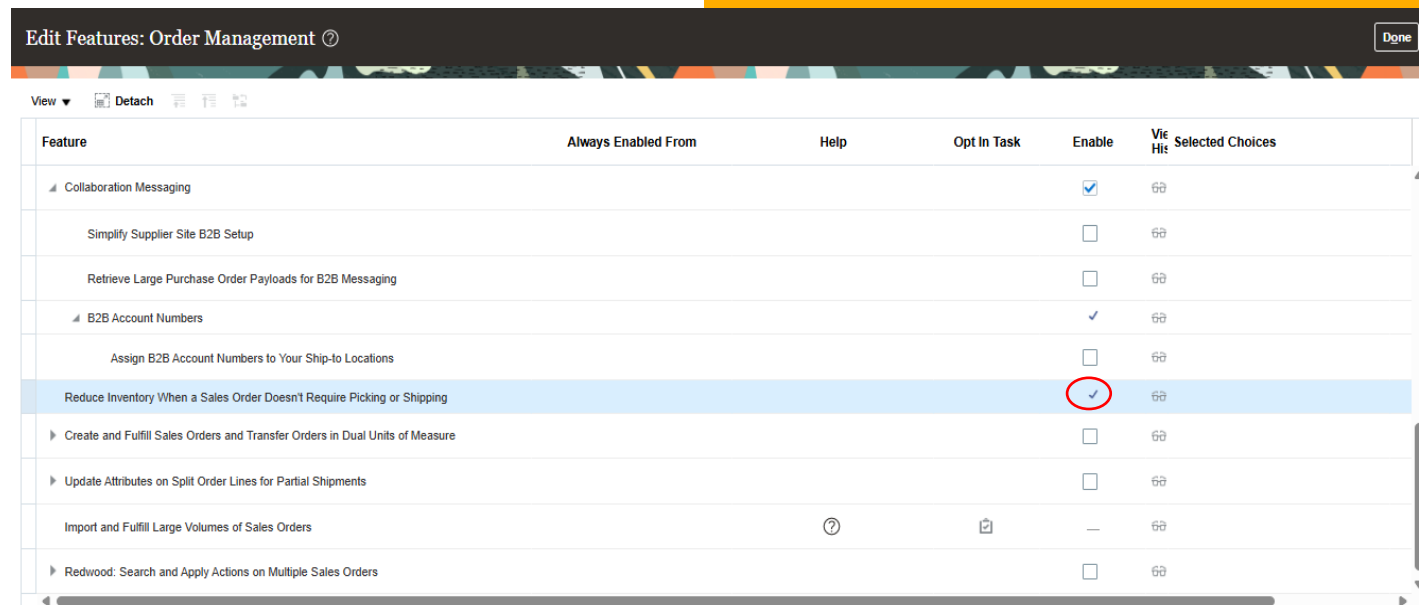
1– Enable the Feature


1. Go to the Setup and Maintenance work area, then select the Order Management offering.
2. Click Change Feature Opt In.
3. On the Opt In page, in the Order Management row, click the pencil.
4. On the Edit Features page, enable the Reduce Inventory When a Sales Order Doesn't Require Picking or Shipping feature.



Name	Always Enabled From	Help	Enable	View History	Features	Setup
Order Management		?	<input checked="" type="checkbox"/>			
Items			<input checked="" type="checkbox"/>			
Pricing			<input checked="" type="checkbox"/>			
Channel Revenue Management			<input type="checkbox"/>			
Supply Chain and Order Management Business Intelligence Analytics			<input checked="" type="checkbox"/>			
Order Management Business Intelligence Analytics			<input checked="" type="checkbox"/>			
Logistics Business Intelligence Analytics			<input checked="" type="checkbox"/>			
Application Extensions		?	<input checked="" type="checkbox"/>			
Global Order Promising			<input checked="" type="checkbox"/>			

Columns Hidden: 2



Feature	Always Enabled From	Help	Opt In Task	Enable	View History	Selected Choices
Collaboration Messaging				<input checked="" type="checkbox"/>		
Simplify Supplier Site B2B Setup				<input type="checkbox"/>		
Retrieve Large Purchase Order Payloads for B2B Messaging				<input type="checkbox"/>		
B2B Account Numbers				<input checked="" type="checkbox"/>		
Assign B2B Account Numbers to Your Ship-to Locations				<input type="checkbox"/>		
Reduce Inventory When a Sales Order Doesn't Require Picking or Shipping				<input checked="" type="checkbox"/>		
Create and Fulfill Sales Orders and Transfer Orders in Dual Units of Measure				<input type="checkbox"/>		
Update Attributes on Split Order Lines for Partial Shipments				<input type="checkbox"/>		
Import and Fulfill Large Volumes of Sales Orders		?		<input type="checkbox"/>		
Redwood: Search and Apply Actions on Multiple Sales Orders				<input type="checkbox"/>		

2– Orchestrate Fulfillment

1. Go to the Setup and Maintenance work area, then go to:
 1. Area: Order Management
 2. Task: Manage Orchestration Process Definitions
2. On the Manage Orchestration Process Definitions page, query for the value:
 1. Process Name:
DOO_InventoryTransactionProcess
3. On the Edit Orchestration page:
 1. Deploy the process.
 2. Release the Process
 3. Click Save and Close

The screenshot displays the Oracle Setup and Maintenance interface. The top navigation bar shows 'Setup: Order Management' with a dropdown arrow, a chat icon, and a help icon. Below this, the 'Functional Areas' section lists various areas with 'Shared' status and a dropdown arrow. The 'Orders' section is expanded, showing a list of tasks. The 'Manage Orchestration Process Definitions' task is highlighted in blue. The right sidebar shows the 'Search Tasks' input field and a list of tasks under the 'Orders' section. The 'Manage Orchestration Process Definitions' task is selected, and its details are shown in the main content area.

Setup: Order Management

Functional Areas

Change Feature Opt In

* Initial Users Shared

* Enterprise Profile Shared

* Organization Structures Shared

* Users and Security Shared

* Items Shared

* Catalogs Shared

* Customers Shared

* Orders Shared

* Pricing Shared

Application Extensions Shared

Search Tasks

Orders

View Format Freeze Detach Wrap Show All Tasks

Task Scope Action

Manage Status Values

Manage Task Status Conditions

Manage Business Event Trigger Points

Manage Orchestration Process Definitions

Manage Orchestration Process Assignment Rules

Manage Jeopardy Priorities

Manage Jeopardy Thresholds

Manage Hold Codes

Manage Constraint Entities

Manage Processing Constraints

Manage Transformation Defaulting Rules

Columns Hidden 3

Manage Orchestration Process Definitions ?

[Save](#)[Save and Close](#)[Cancel](#)

Search

[Advanced](#)


Saved Search

All Orchestration Processes ▾

* Process Name

Search Results

Actions ▾ View ▾ Format ▾ +  X  Freeze  Detach  Wrap ?

Validation	Process Name	Description	Effective Start Date	Effective End Date	Status	Version
	DOO_InventoryTransactionProcess	Orchestration process that m...	27/10/20		Released	1

Columns Hidden 2

DOO_InventoryTransactionProcess: Step Details

View ▾ Format ▾  Freeze  Detach  Wrap

Step	Step Name	Task Type	Task	Service	Subprocess Name
100	Create Inventory Transaction	DOO_InventoryTransaction	Inventory Transaction	Create Inventory Transaction	
200	Create Invoice	Invoice	Invoice	Create Billing Lines	
300	Wait for Invoice	Invoice	Invoice	Wait for Billing	



Edit Orchestration Process Definition: DOO_InventoryTransactionProcess ?

Actions Save **Save and Close** Cancel

Orchestration Process

* Process Name	DOO_InventoryTransactionProcess	Description	Orchestration process that makes inventory transactions to fulfill sales orders.
Version	1	Cost of Change Rule	Click for Rule
Process Display Name	Inventory Transaction Process	* Effective Start Date	27/10/20
Process Class	Ship Order Class	Effective End Date	dd/mm/yy
Status Catalog		* Set	Common Set
Change Mode	Advanced	Attachments	None +

Status Released

- ✓ Parent process
- Use flexfield at
- Use transaction
- ✓ Replan instant

Validate
Revise Process
Reject Process
Reject Previous Version
Generate Process Diagram
Release
Deploy Process
Obsolete Process
Regenerate Orchestration Process

Additional Information

Process Details

Step Definition Status Conditions

3- Create Order Type

1. Go to the Setup and Maintenance work area, then go to:
 1. Area: Order Management
 2. Task: Manage Order Lookups
2. On the Manage Order Lookups page, query for the value:
 1. Lookup Type:
ORA_DOO_ORDER_TYPES
3. On the ORA_DOO_ORDER_TYPES Tab:
 1. Click the add icon.
 2. Define Order Type (Spot Sales)
 3. Enable the Order Type
4. Click Save and Close

The screenshot displays the Oracle Setup: Order Management interface. The top navigation bar shows "Setup: Order Management" with a search icon and a help icon. Below the navigation bar, the "Functional Areas" section lists various areas, with "Orders" selected and highlighted in blue. To the right of the "Functional Areas" list is a "Change Feature Opt In" link. On the right side of the interface, the "Orders" task list is visible, with "Manage Order Lookups" selected and highlighted in blue. The task list includes various tasks such as "Manage Order Profiles", "Manage Order Descriptive Flexfields", "Manage Order Extensible Flexfields", "Publish Extensible Flexfield Attributes", "Manage Order Attachment Categories", "Manage Order Management Parameters", "Manage Upstream and Fulfillment Source Systems", "Collect Order Reference Data", and "Review Collected Order Reference Data". The bottom of the task list shows "Columns Hidden 3".

Manage Order Lookups ?

Save Save and Close Cancel

Search

Lookup Type

Meaning

Description

Module

Search Reset

Search Results

Actions View Format + X Detach Wrap

Lookup Type	Meaning	Description	Module	Lookup Configuration Level	REST Access Secured
ORA_DOO_ORDER_TYPES	Type of Sales C	Abbreviated text that identifies the type of sal	Decomposition	User	Authenticated

ORA_DOO_ORDER_TYPES: Lookup Codes

Actions View Format + X Detach Wrap

Spot Sales	9	<input checked="" type="checkbox"/>	dd/mm/yy	dd/mm/yy	Spot Sales
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4– Manage Process Assignment Rules for Sales Orders

1. Go to the Setup and Maintenance work area, then go to the task:
 1. Area: Order Management
 2. Task: Manage Process Assignment Rules for Sales Orders
2. On the Manage Process Assignment Rules for Sales Orders page, click on an active rule or create a new one.
3. Add a new 'If' condition rule: Set 'Order Type' to 'Spot Sales'
4. Click 'Then' to create the 'Do' action: Set 'Process Name' to DOO_InventoryTransactionProcess.
5. Click Save and Close
6. Click Publish

The screenshot displays the 'Setup: Order Management' interface. At the top, there's a header bar with the title 'Setup: Order Management' and icons for video, chat, and help. Below the header, the main content area is divided into two panels. The left panel, titled 'Functional Areas', lists various areas with a 'Shared' status and a dropdown arrow. The 'Orders' area is currently selected and highlighted in blue. The right panel, titled 'Search Tasks', contains a search bar and a list of tasks under the 'Orders' category. The task 'Manage Process Assignment Rules for Sales Orders' is highlighted in blue.

Functional Areas	Change Feature Opt In
* Initial Users	Shared ▼
* Enterprise Profile	Shared ▼
* Organization Structures	Shared ▼
* Users and Security	Shared ▼
* Items	Shared ▼
* Catalogs	Shared ▼
* Customers	Shared ▼
* Orders	▼
* Pricing	▼
Application Extensions	Shared ? ▼

Search Tasks

Orders


View ▼ Format ▼ Freeze Detach Wrap


Task


- Generate Bucket Sets for Business Rules
- Manage Supply Chain Financial Orchestration Qualifiers
- Manage Supply Chain Financial Orchestration System Options
- Manage Drop Ship Financial Flows
- Manage External Integration Routing Rules for Sales Orders
- Manage Process Assignment Rules for Sales Orders
- Manage Pretransformation Rules for Sales Orders
- Manage Order Approval Rules

Manage Orchestration Process Assignment Rules ?

Search All

AssignProcess
 Priority: medium

Orch Rule
 Priority: medium

Orchestration Rules
 Priority: medium

Orchestration Rules

Information

* Name

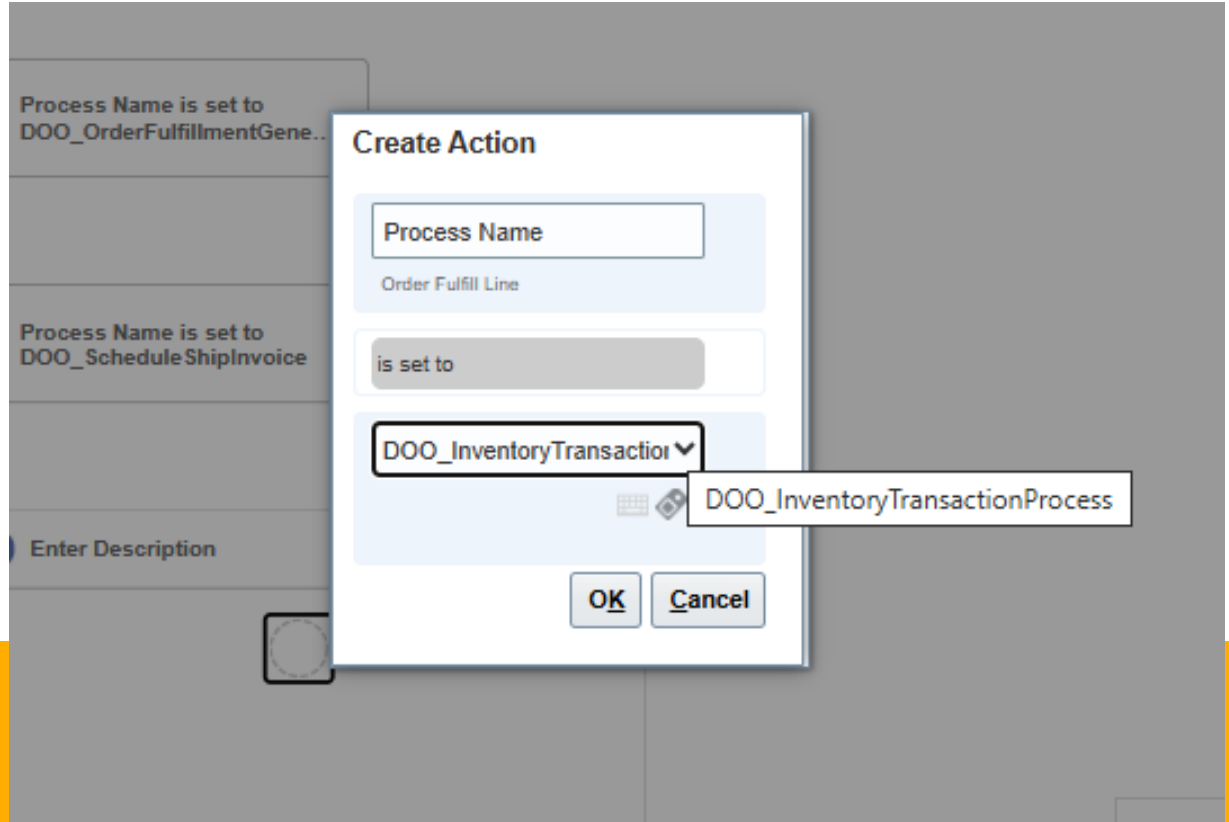
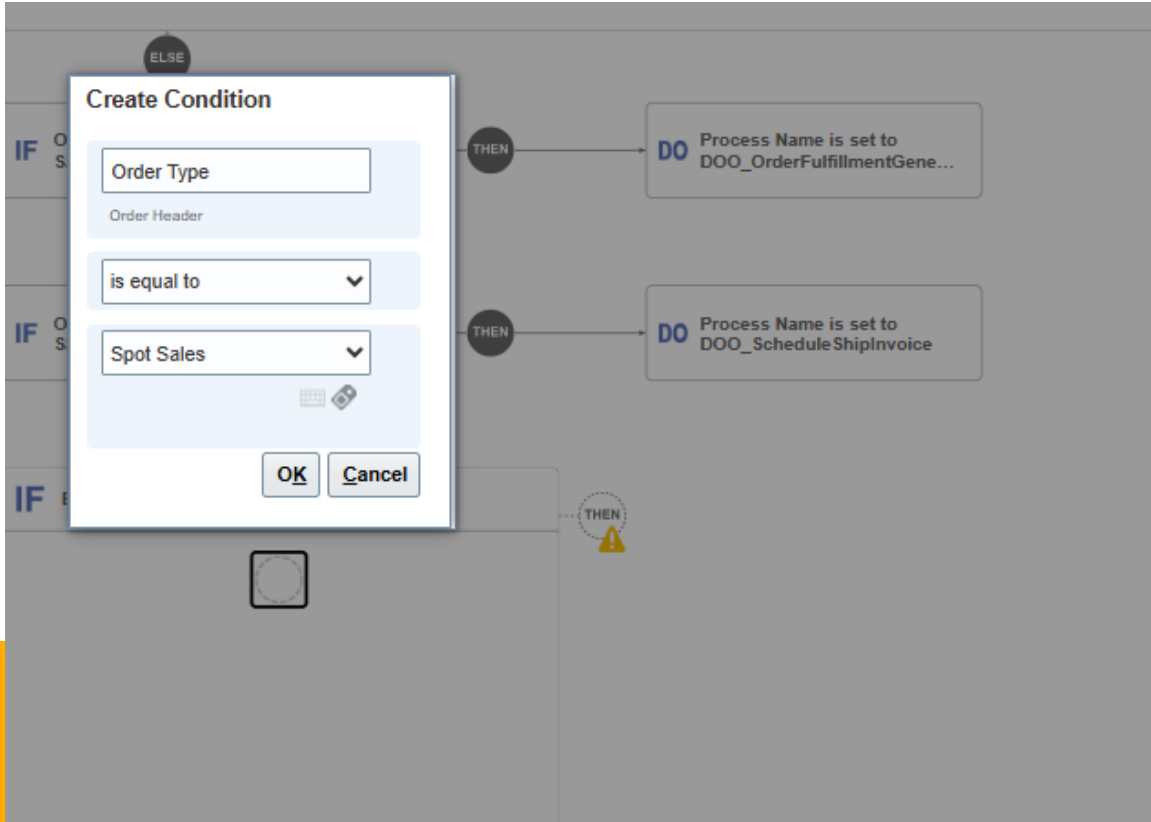
Description

Priority

Activate Rule ☒

☐ Start

☐ End



Prerequisites Before Demo



1. Item Configuration:
 1. Verify that the item is sales-enabled in Product Management.
 2. Check that the item has sufficient stock in inventory.
2. Lot/Serial Control:
 1. For items with lot or serial control, ensure you can select the appropriate lot, serial number, or both during order creation.
 2. If the item is not lot or serial-controlled, it should transact directly.
3. Price List Assignment
 1. Confirm that the item is listed in a valid price list.
 2. Ensure the price list is linked to the customer for successful order creation.

Demo Cycle

1. Create Sales Order
 1. Select the customer
 2. Select the BU
 3. Select the Order Type (Spot Sales)
2. Add Items to the Order
 1. Item 1 (no Lot or Serial Control)
 2. Item 2 (Lot and Serial Controlled)
3. Shipment Details :
 1. Navigate to the Shipment Details section and click on the Supply tab.
 2. Ensure that both Inventory and Subinventory are selected correctly.
4. Order Line Details:
 1. Ensure that Allow Inventory Transaction is set to Yes in the Order Line Details.
 2. Click on Action and select Manage Lot and Serial Numbers for Item 2 (Lot and Serial Controlled item).
5. Click Submit Order

Create Order: ABC - 307 - Draft ?

Currency = Egyptian Pound

Customer: ABC

Contact:

Contact Method:

* Ordered Date: 25/01/25 10:21 PM

Purchase Order:

Order Type: Spot Sales

Business Unit:

Bill-to Customer:

Bill-to Account:

Ship-to Customer:

Ship-to Address:

Sales Credit:

Sales Agreement:

Order Lines ?

Select Item:

Actions: View Update Lines Freeze Detach

	Item	Project Details	Duration	Period	Quantity	UOM	Amount for
1	MG-Spot Sales NA- MG-Spot Sales No Control				1	Each	
2	MG-Spot Sales- MG-Spot Sales LOT Serial Control				1	Each	

Shipment Details ?

General Shipping **Supply**

Warehouse
Supplier
Supplier Site

Demand Class
Allow Item Substitution
Subinventory

Order Line Details

View ▾ Estimate Order Availability Freeze Detach

	Over	Item	Subinventory	Allow Inventory Transaction	Supplier	Supplier Site	Demand Class	Allow Item Substitution	Ship-to Site	Item Type	Item Subtype	Sales Type
1		MG-Spot Sales NA - MG-Spot Sales No Contr...	Staging	Yes ▾				No	ABC CAIRO	Standard	Standard	
2		MG-Spot Sales - MG-Spot Sales LOT Serial C...	Staging	Yes ▾				No	ABC CAIRO	Standard	Standard	

Rows Selected 1 Columns Hidden 2 Columns Frozen 2

Manage Lot and Serial Numbers: Line 2



View ▼ + ✕

* Quantity	Revision Number	Locator	Lot	From Serial Number	To Serial Number
<input type="text" value="1"/>	<input type="text" value=""/> ▼		<input type="text" value="MG1"/> ▼	<input type="text" value="0"/> ▼	<input type="text" value="0"/>

1. Click on action
2. Switch to Fulfillment View
3. Click Fulfillment Lines

Order: ABC - 307 - Processing ?

Actions ▾ Refresh Done

Last Refreshed 25/01/25 11:44 PM

Customer ABC Source Order Revision 1 Customer Contact

Customer Registry ID 54362 Source Order Revision Date Reason for Change Order

Purchase Order Source Order 307 Comments

Status Processing Source Document Type Sales order Canceled Date

User Request Status Ordered Date 25/01/25 10:21 PM Attachments None

On Hold Processes Assigned Yes Additional Information

Source Order System OPS Message Type

Revision Source Order System OPS Business Unit DMT_Damietta Port_BU

Order Lines **Fulfillment Lines** Returns

Actions ▾ View ▾ Format ▾ Schedule Check Availability Freeze Detach Wrap ?

Fulfillment Line	Exception Type	Message Type	User Request Status	Customer	Item	Status	Source Order	Order Line	Orchestration Process Number	Orchestration Process Name
▶ 1-1				ABC	MG-Spot Sales NA	Awaiting Billing	307	1	300000012172059	DOO_InventoryTransactionProcess
▶ 2-1				ABC	MG-Spot Sales	Awaiting Billing	307	2	300000012172065	DOO_InventoryTransactionProcess

Columns Hidden 123 Columns Frozen 6

Orchestration Process: DOO_InventoryTransactionProcess - 300000012...

Recover Process

Cancel Current Task

View Hold Details

Refresh

Done

Last Refreshed 25/01/25 11:45 PM

Customer ABC

Customer Registry ID 54362

Order 307

Process Transaction Value 360.00 EGP

Process Standardized Value 360.00 EGP

Status Awaiting Billing

Locked No

Jeopardy Score

Jeopardy Reason

Jeopardy Priority

Message Type

Actual Start Date 25/01/25 11:44 PM

Actual Completion Date

Planned Completion Date

Planned Fulfillment Date

Actual Fulfillment Date

Required Fulfillment Date

Ordered Date 25/01/25 10:21 PM

Paused Tasks

Orchestration Plan Fulfillment Lines

View		Actions						Default	Task Types	All tasks					
Task Progress	Task	Status	M	Jan 19, '25		Jan 26, '25									
				01-24	01-25	01-26	01-27	01-28	01-29	01-30	01-31	02-01			
	Inventory Transactio	Interfaced to Invent													
	Invoice	Awaiting Billing													



Fusion SCM Essentials: Easy-to-Learn Guides

If you need any support regarding this cycle or have any questions, feel free to contact me. I would be more than happy to assist you!

