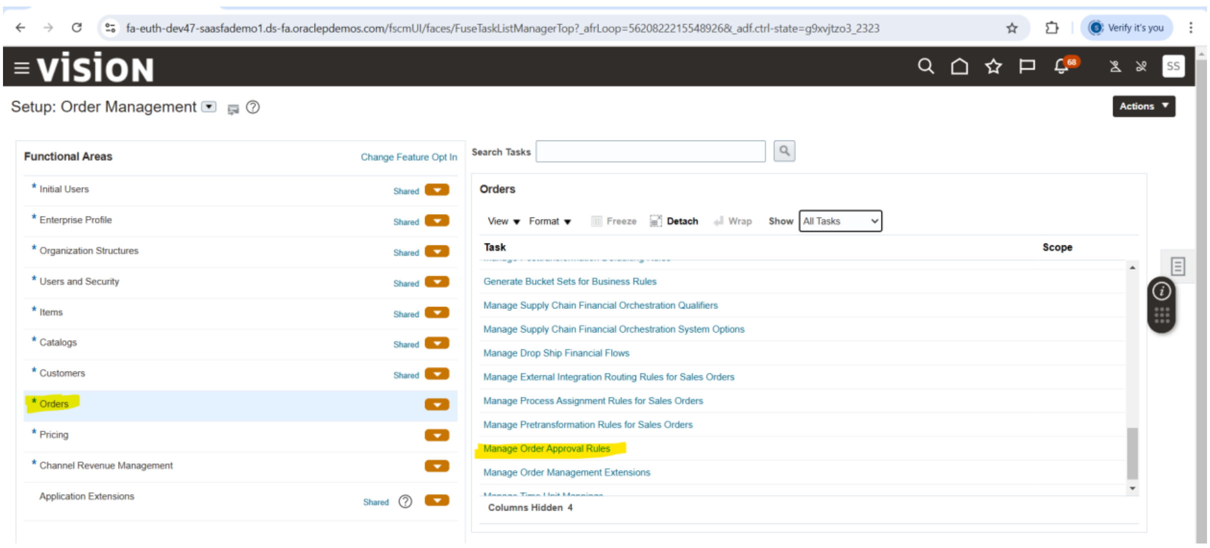
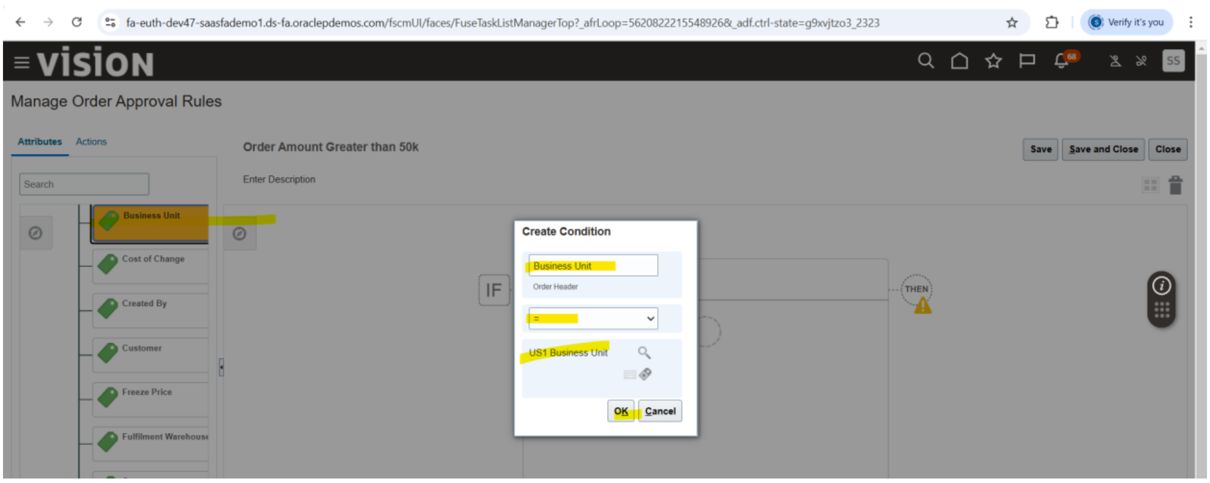
Sales order Approvals: -

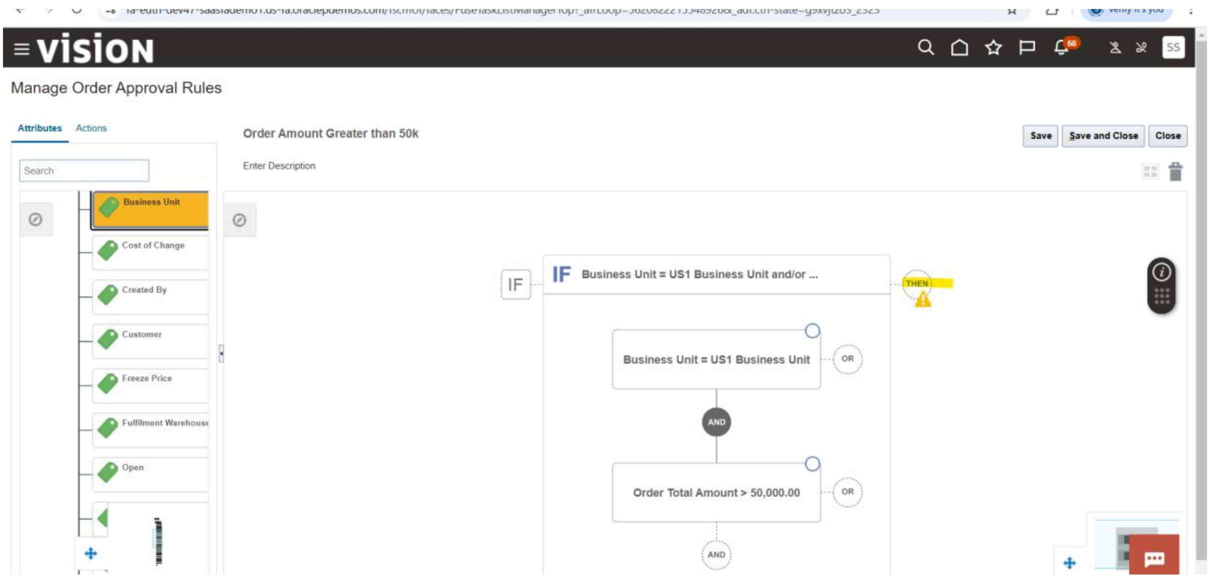
Sales Order Approvals	Manage order approvals standards/discounts
	Activate and check the approvals
	Enable sales order approvals
Pre Transformation Rules (Def Rules)	Manage pre transformation Defaulting Rules for sales order
Post Transformation Rules	Manage Post transformation Defaulting Rules
Enterprise level -> User creation: None	
Sale Person	Create Employee-> Sales Rep
Manage Resources	Assign Sales Person to Reference Data Set
Line Adjustment Lookups	Pricing Lookups
Adjustment Reason	Manage Standard Lookup
Generic Holds	Manage Hold Codes
Credit Hold	Manage Hold Definitions
Credit Limit	Receivables Customer Profile Class

Manage order approvals:

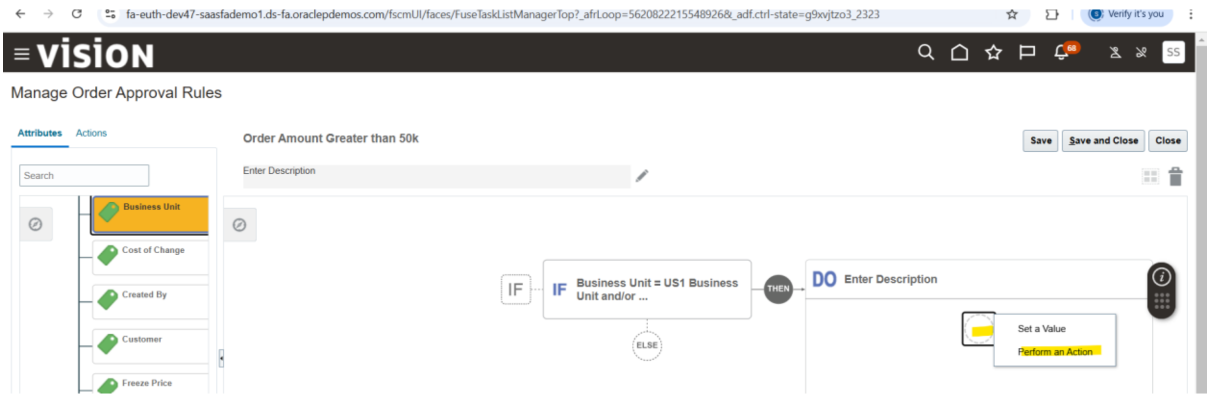




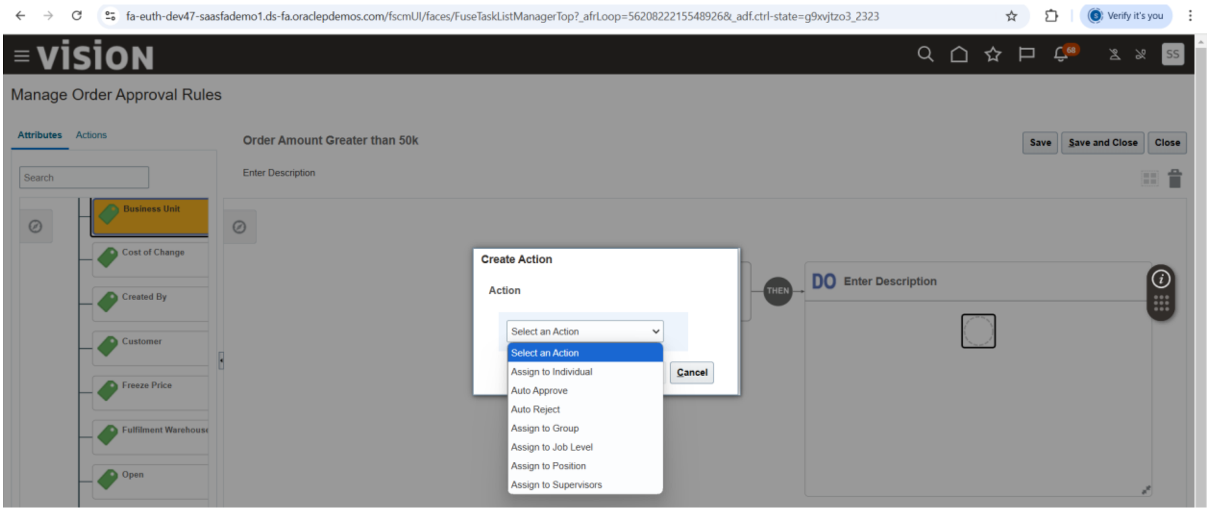
Here we are writing the rules.



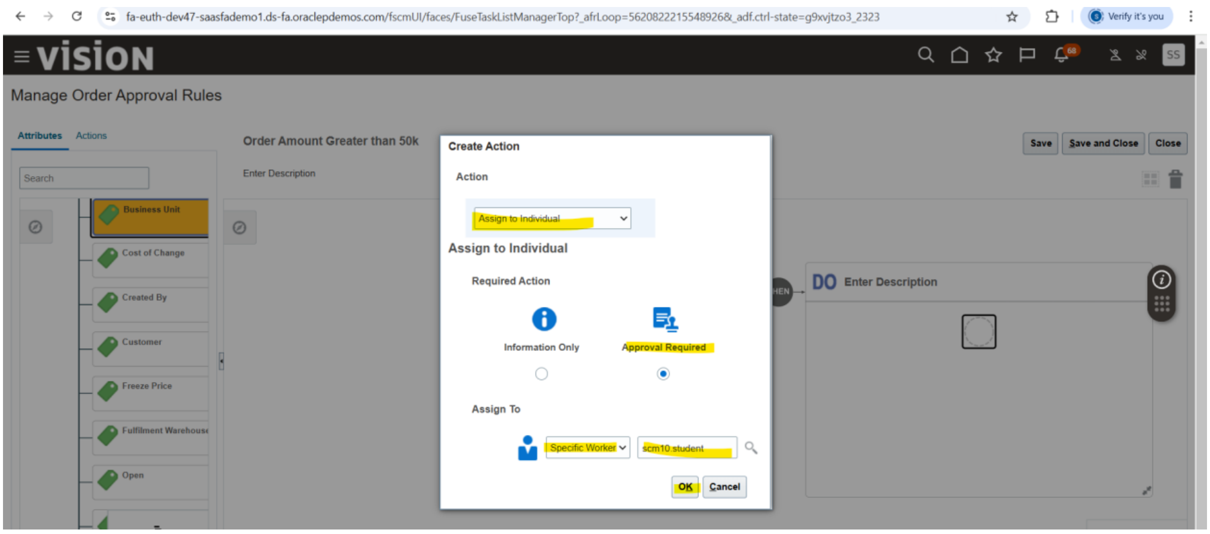
If the sales order is from US1 Business Unit, and amount>50,000, then click on DO



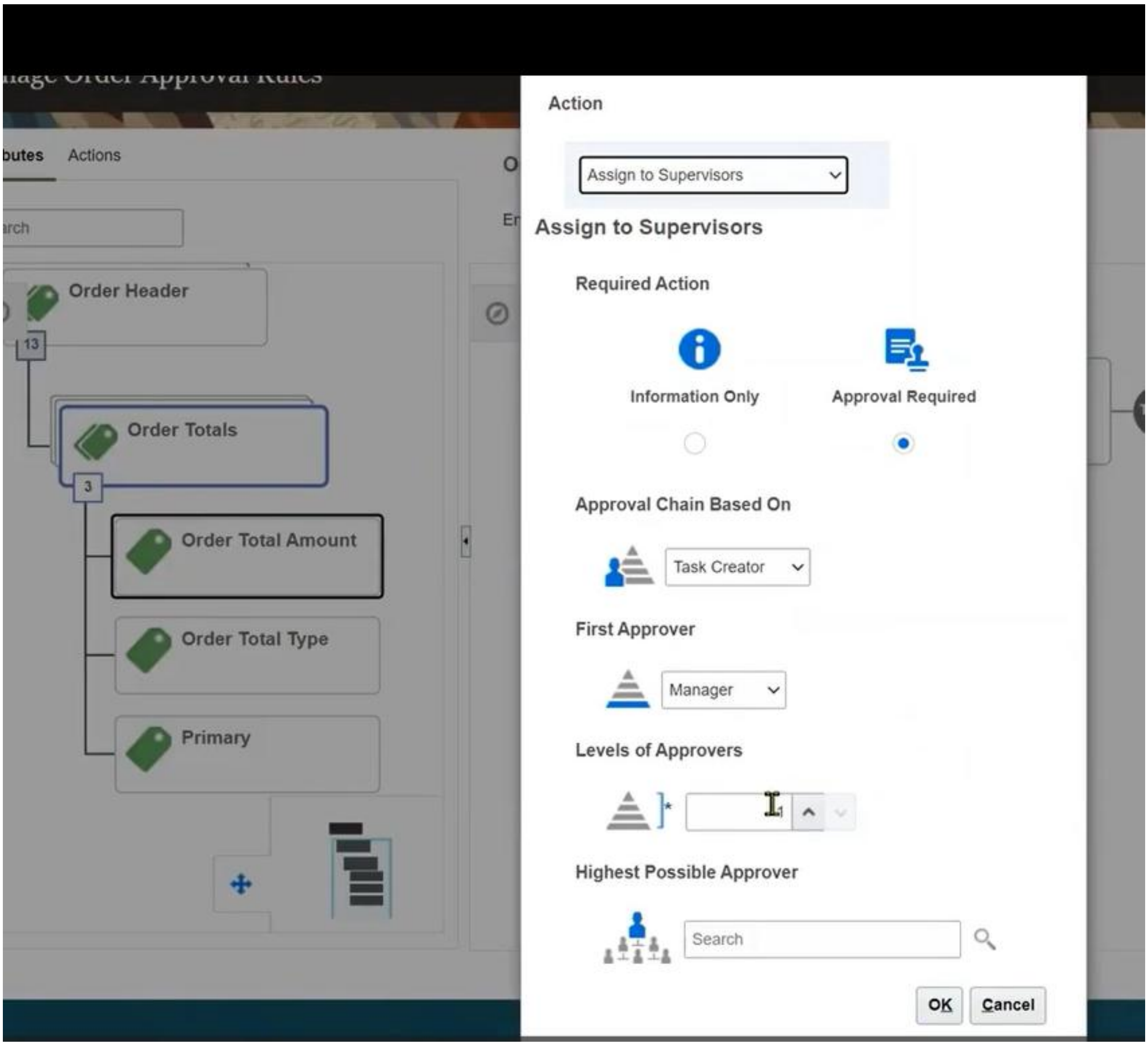
Click on the circle perform an action.



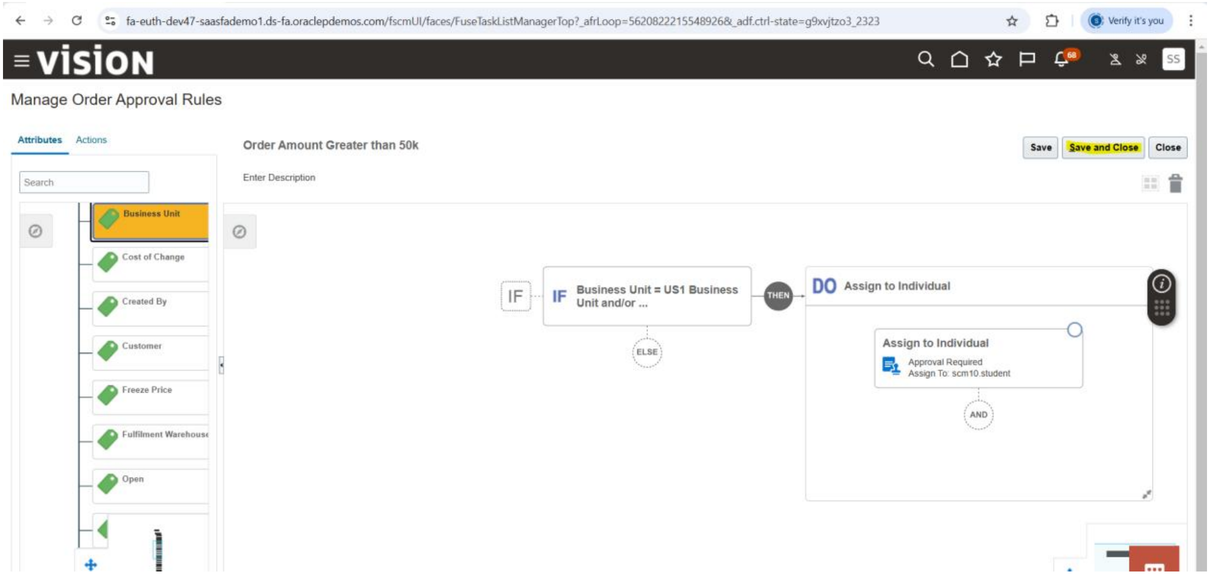
Choose what hierarchy you want for approval



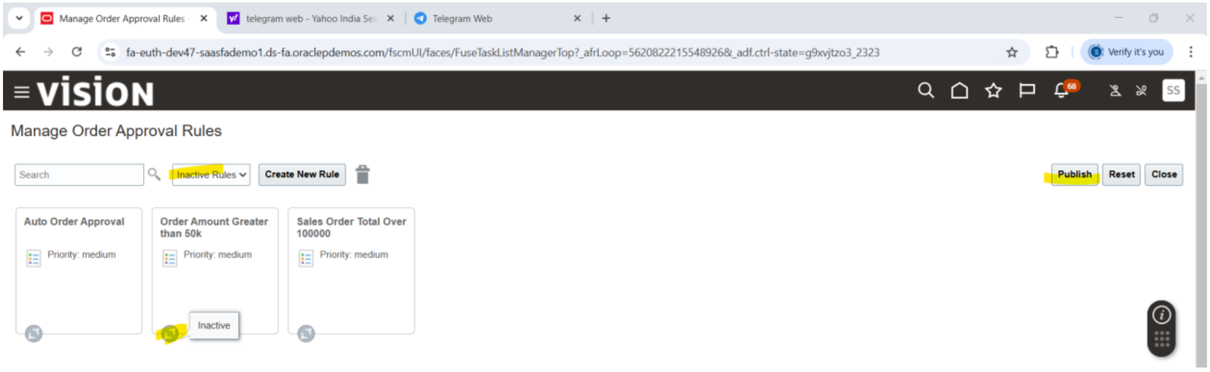
I am assigning to specific worker, like scm10.student.

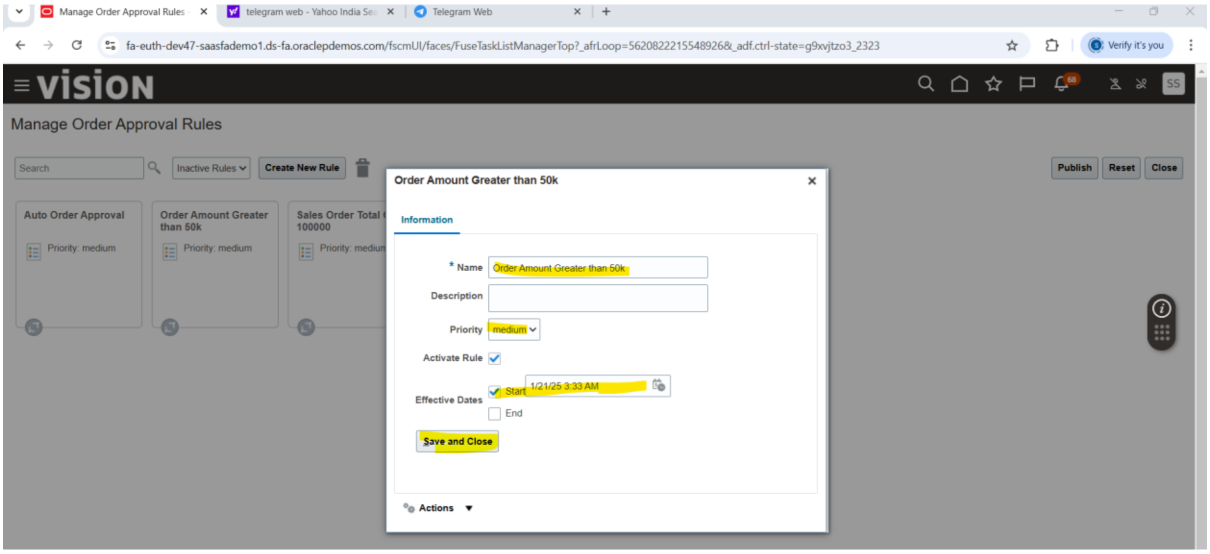


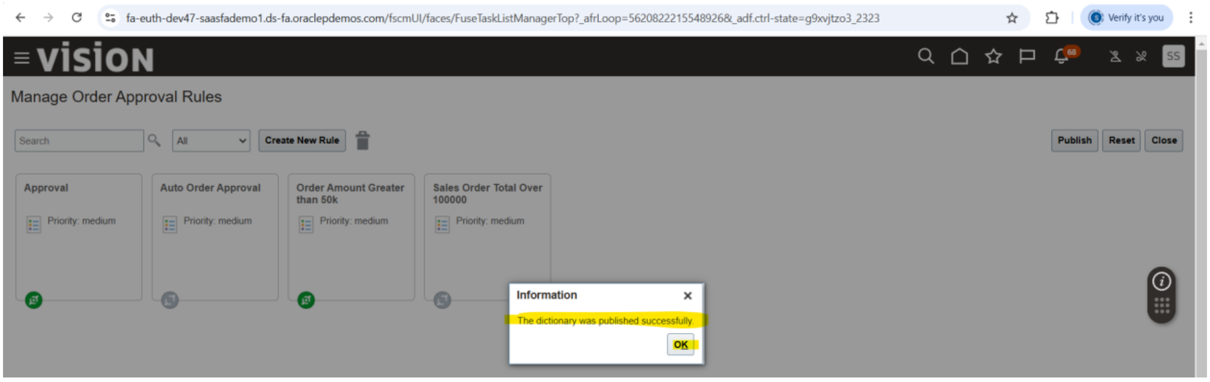
You can select supervisor r hierarchy as well.



Save and close.

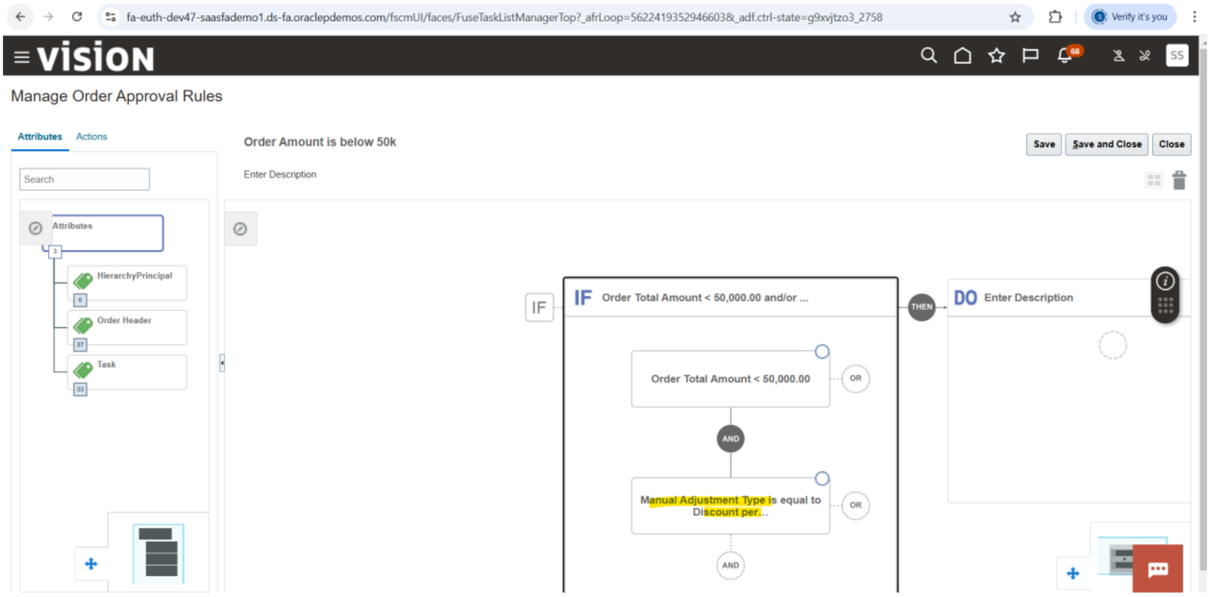




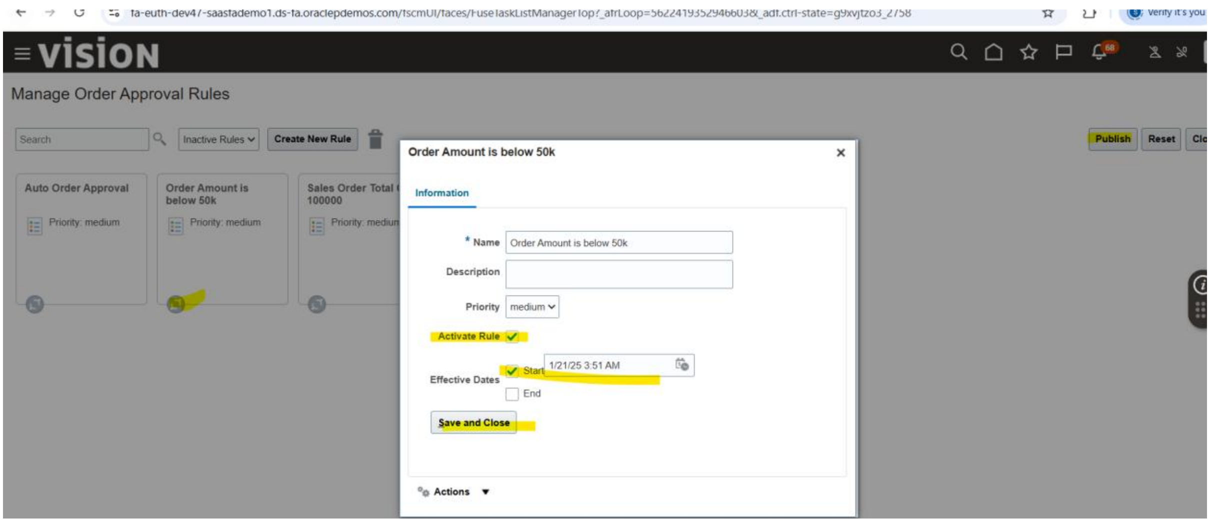


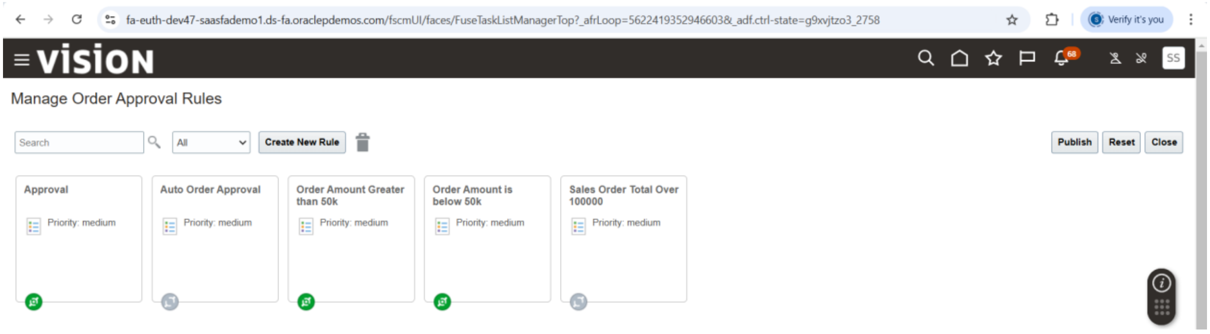
Not only based on BU, we can write approval rules based on order type, customer etc.

If you are providing any discounts,



We will use Manual Adjustment type, I am assigning approval required from task creator and specific worker like manage etc.

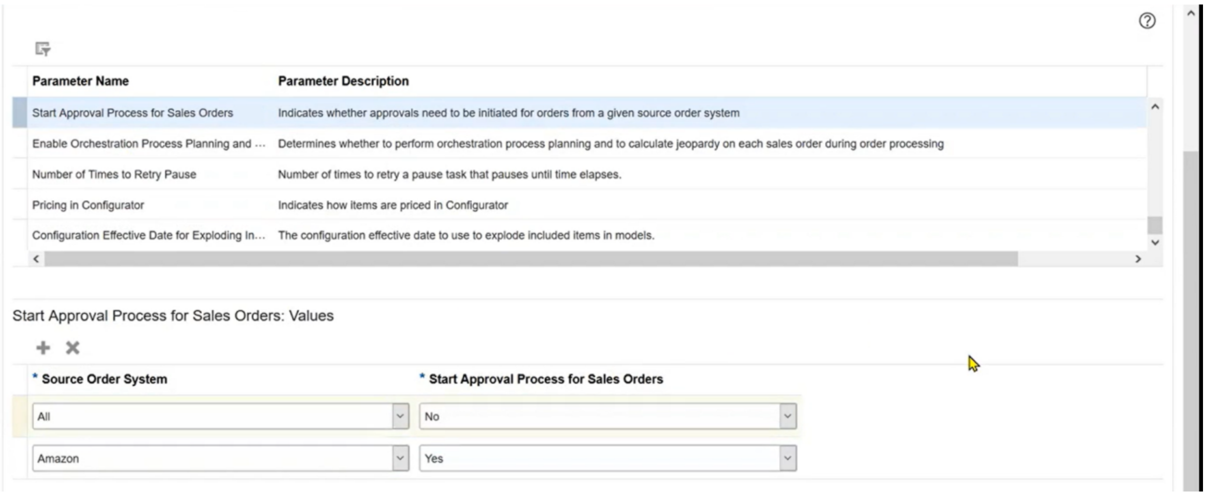


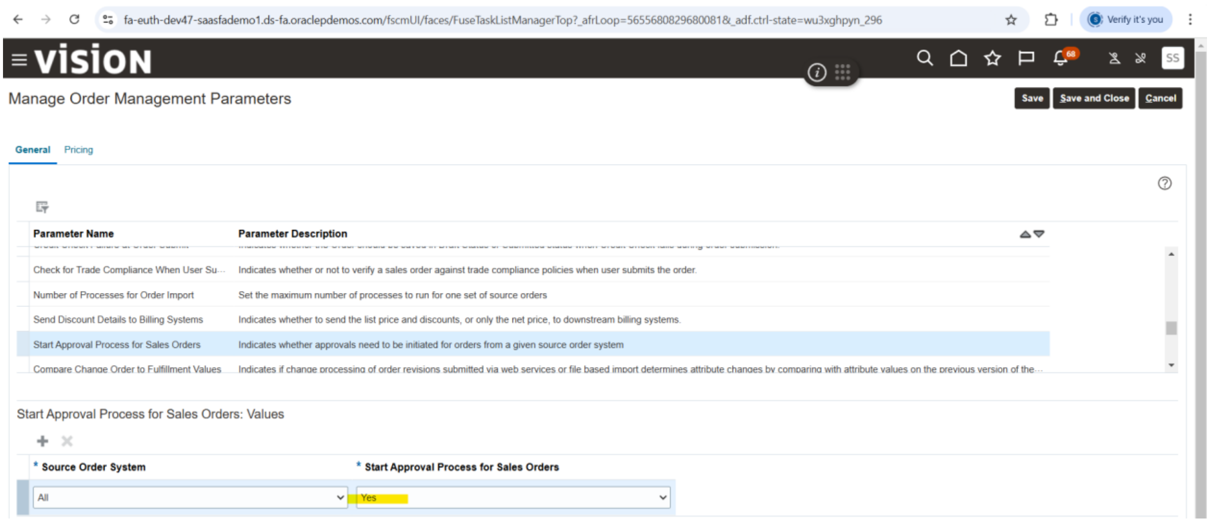


Publish it. Go and verify the values are defaulted.

Normally while creating the sales orders, we need to enter a lot of fields in the sales order creation page, so we will default some information. This concept is called pre transformation rules for sales orders.

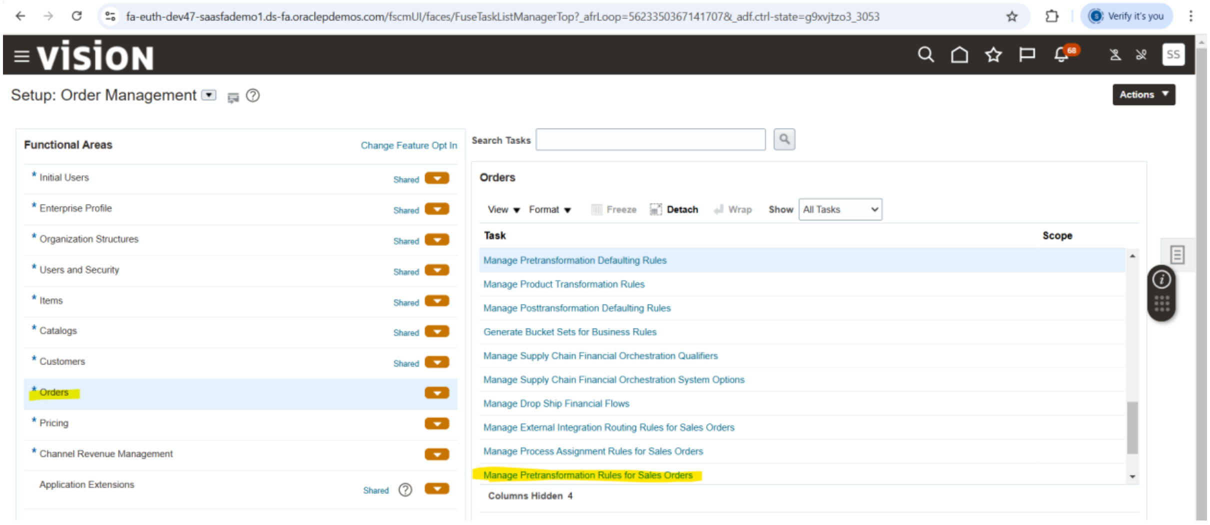
For sales order approvals, you have to enable approvals required or not

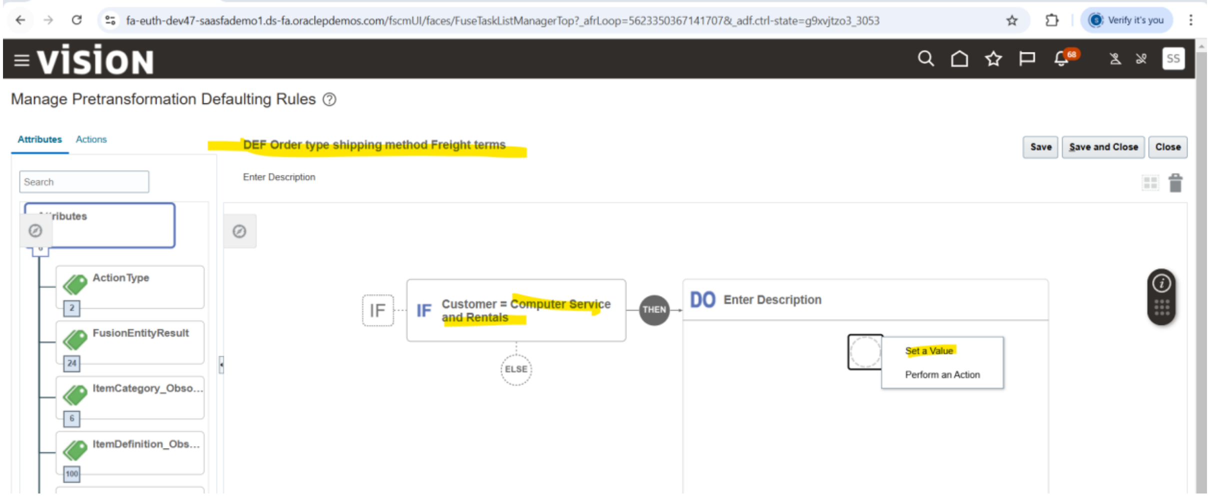




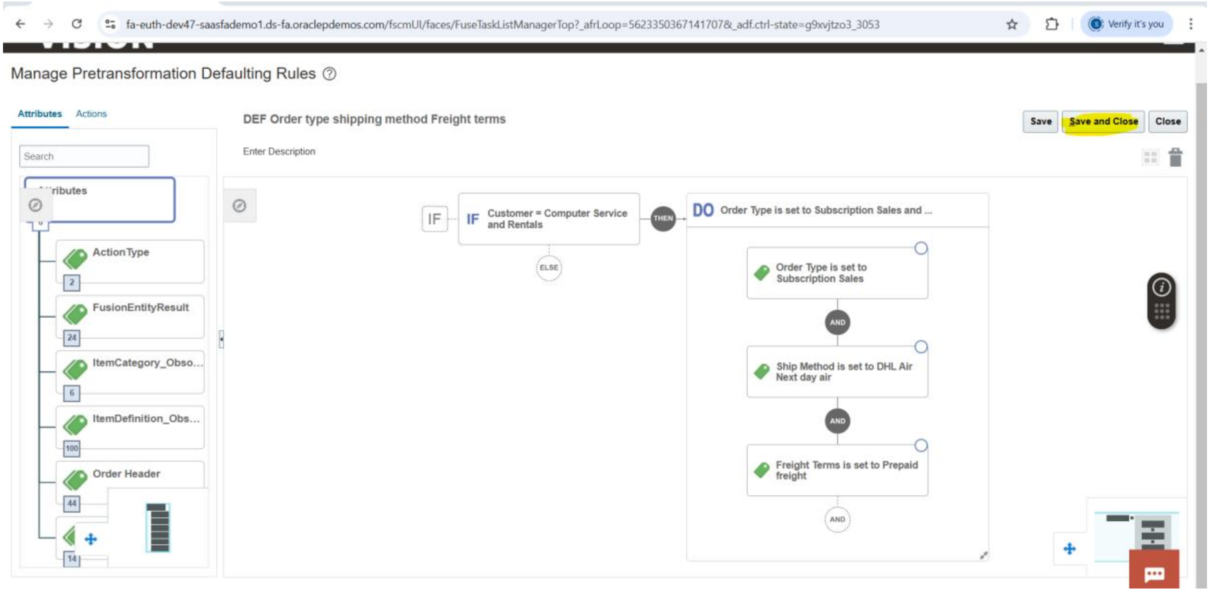
Based on the source

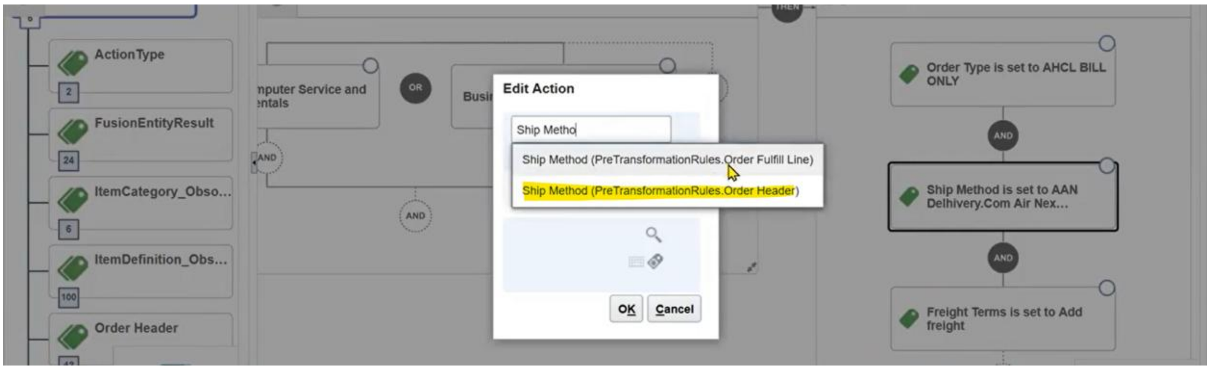
pre transformation rules for sales orders:-



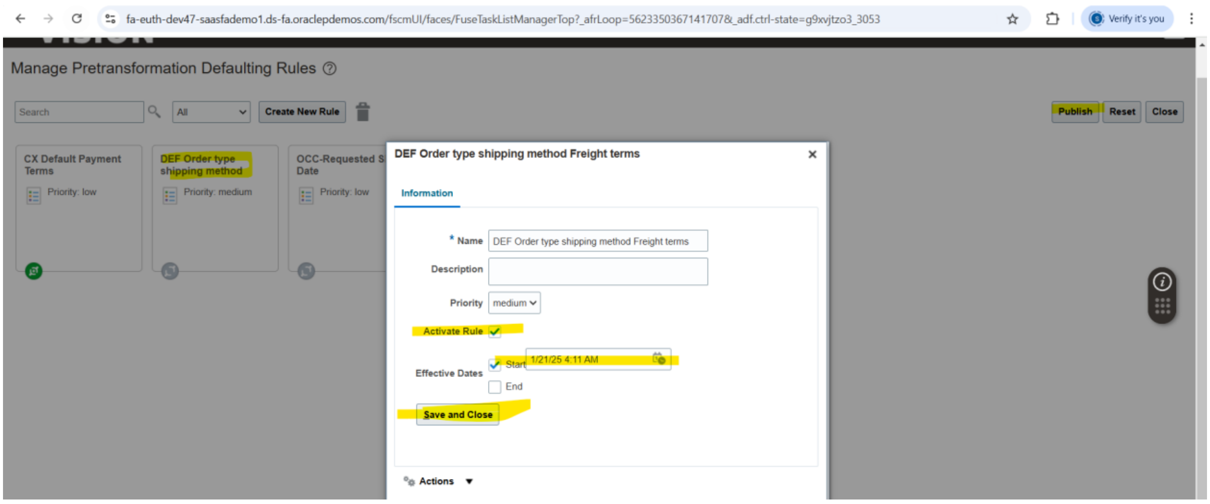


I am writing the condition based on the customer for any BU.

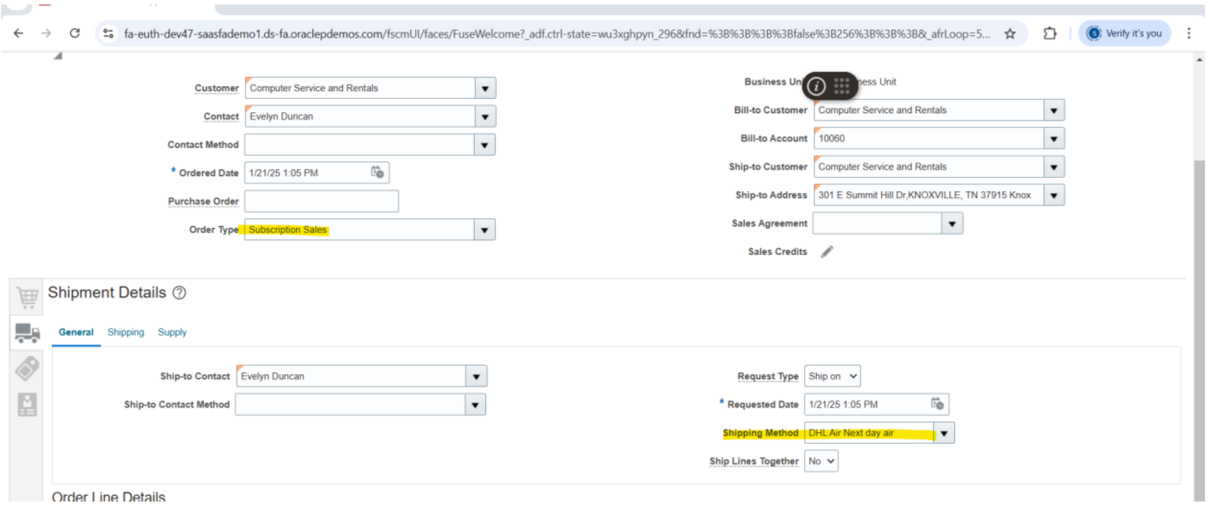




I am setting the default values, order type, ship method, and freight terms.

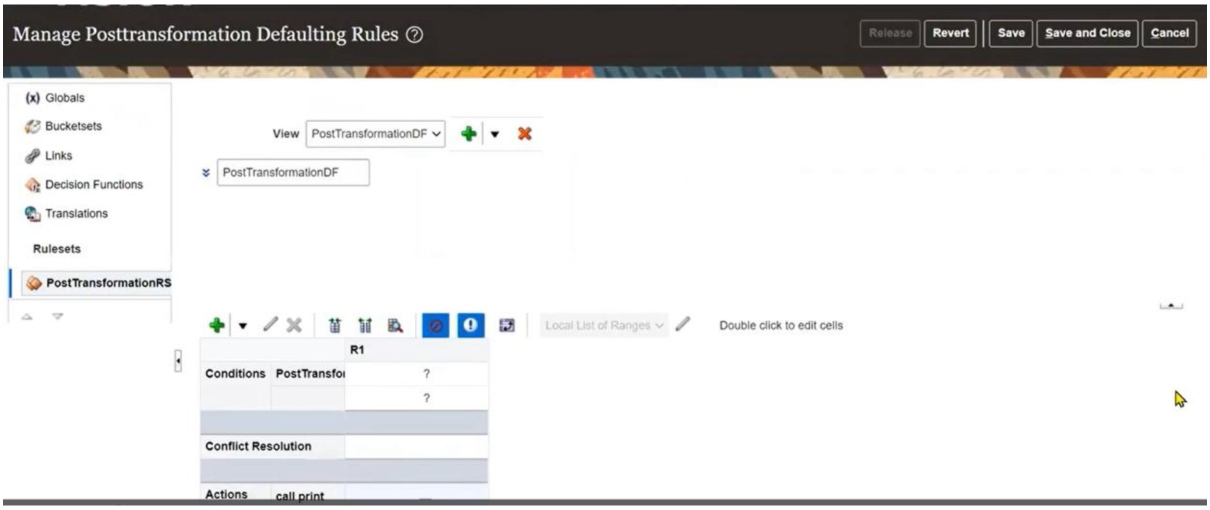


Activate and publish it.



Post transformation rules: -

After submitting the sales order, still we can able to see some default values, post transformation rules are not user friendly, we have to write conditions under expression language. These are difficult to implement, in real time, raise SR, oracle will provide the conditions, rules etc.



What are the situations we will use, for example.

Order Management Account Receivables

Order Type: Amazon Bill only AR Invoice Transaction Type: Amazon Invoice TX type

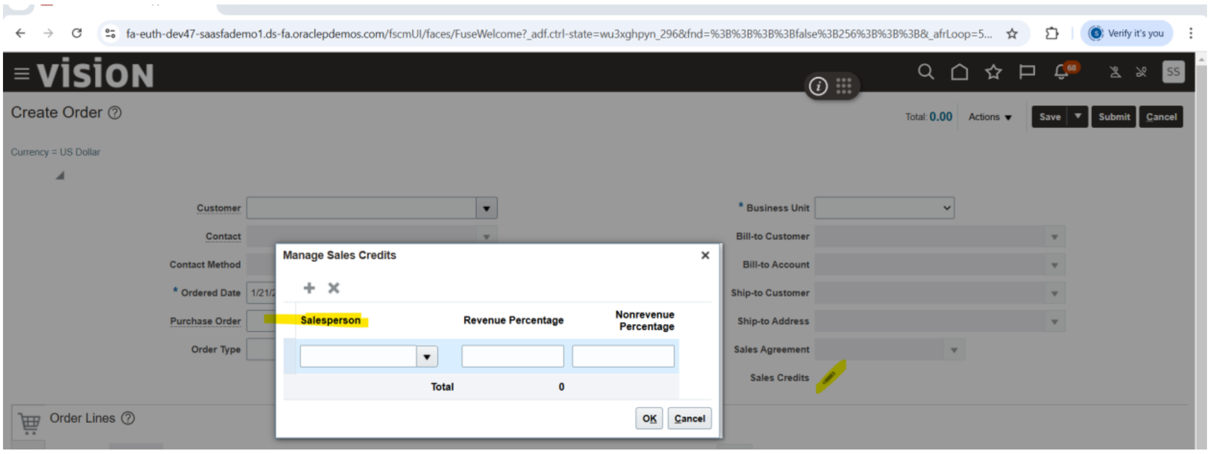
Fusion: Post Transformation rule: Order Type →AR Invoice Transaction type.

How to Skip the Reservation Step from Orchestration Process (Doc ID 2291214.1)

When you want to skip the reservation step, goto the orchestration process, do the unreserve operation for the line.

Sales person: -

Normally we will enter the sales person name while creating the sales orders.

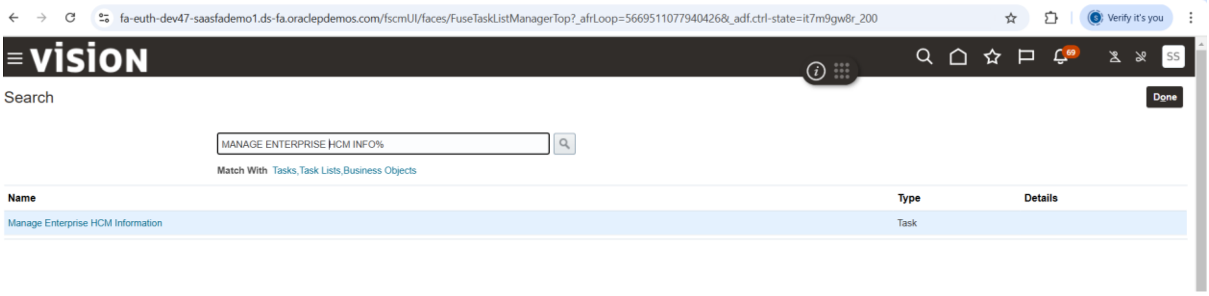


From the sales credits, we can add the sales person.

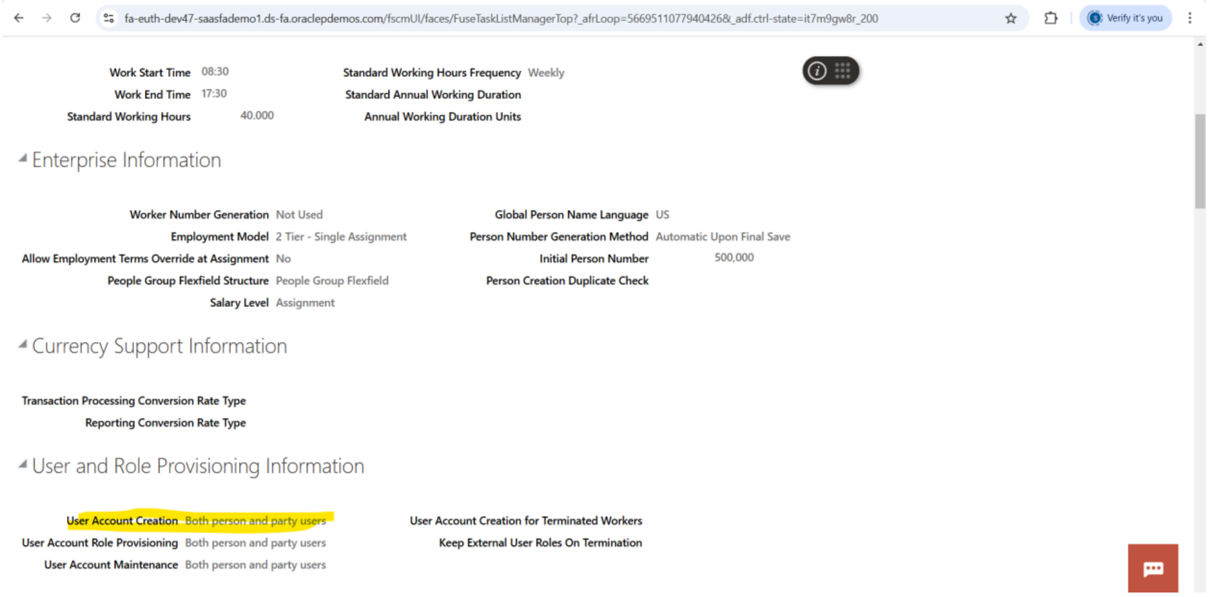
Sales person (receive the order from the customer) → e-mail the details to the customer service team→ Customer service (Order entry team)→ pick,ship(Inventory users)→ invoice, receipt(Finance). Sales person also we can create like employees only.

Oracle license: 20: Sales persons can be created like employee users we are creating.

Oracle will provide license, how many persons per license.

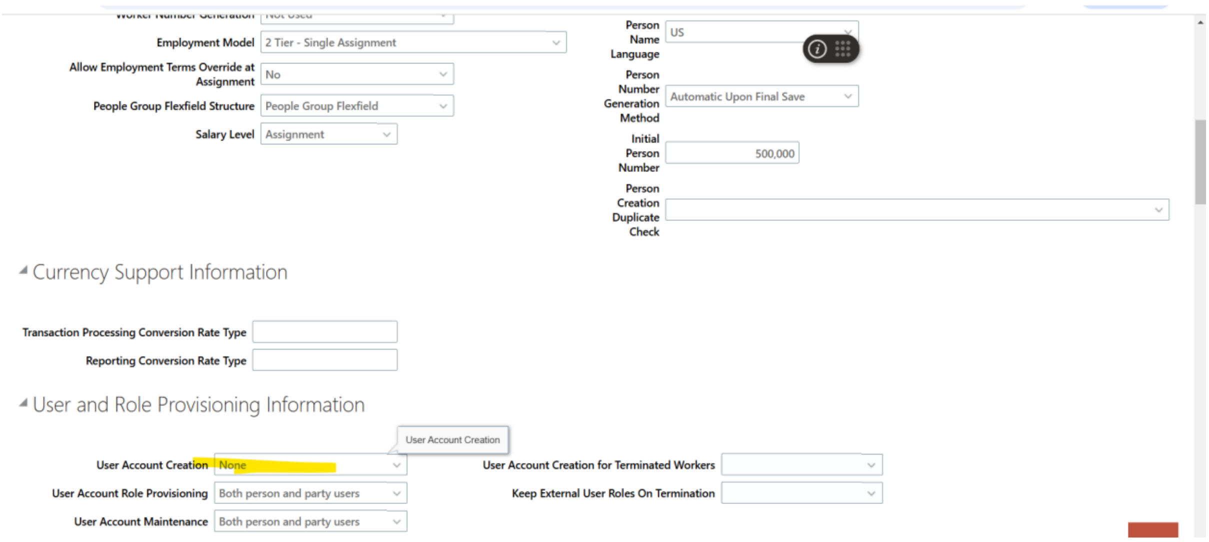


GOTO Manage Enterprise HCM Info,

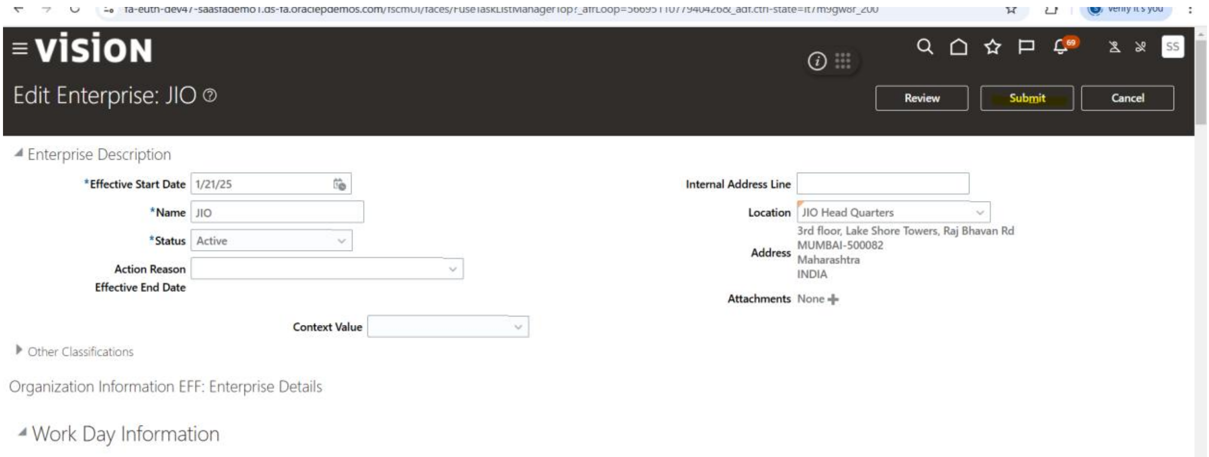


We should keep user account creation none.

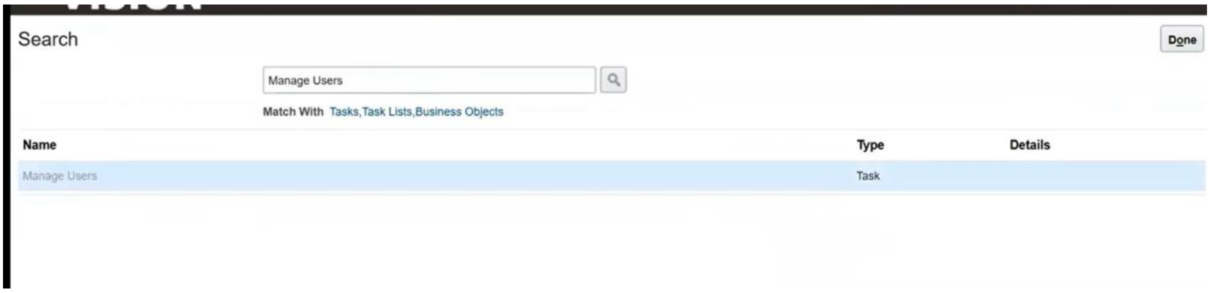
Actions> update

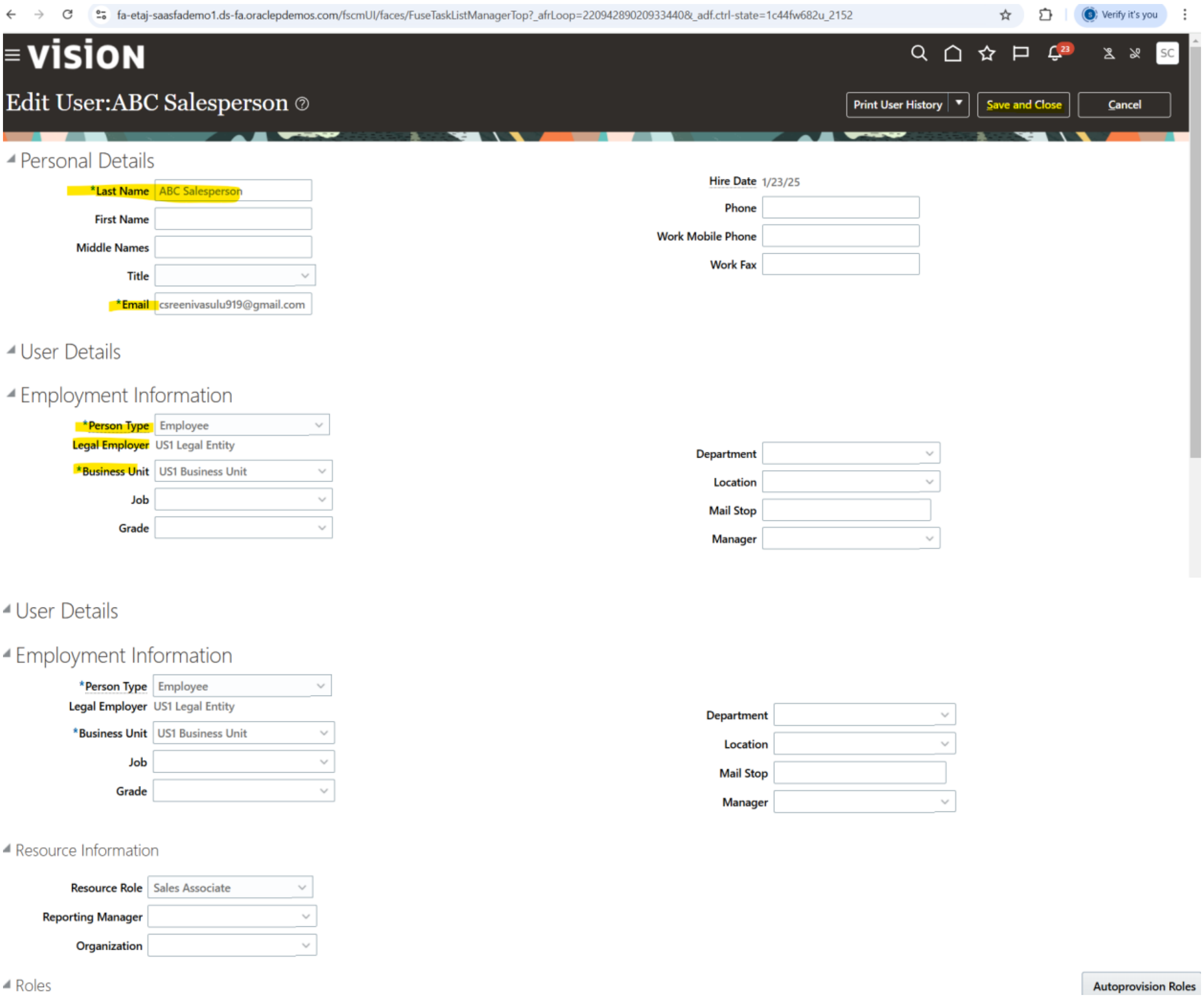


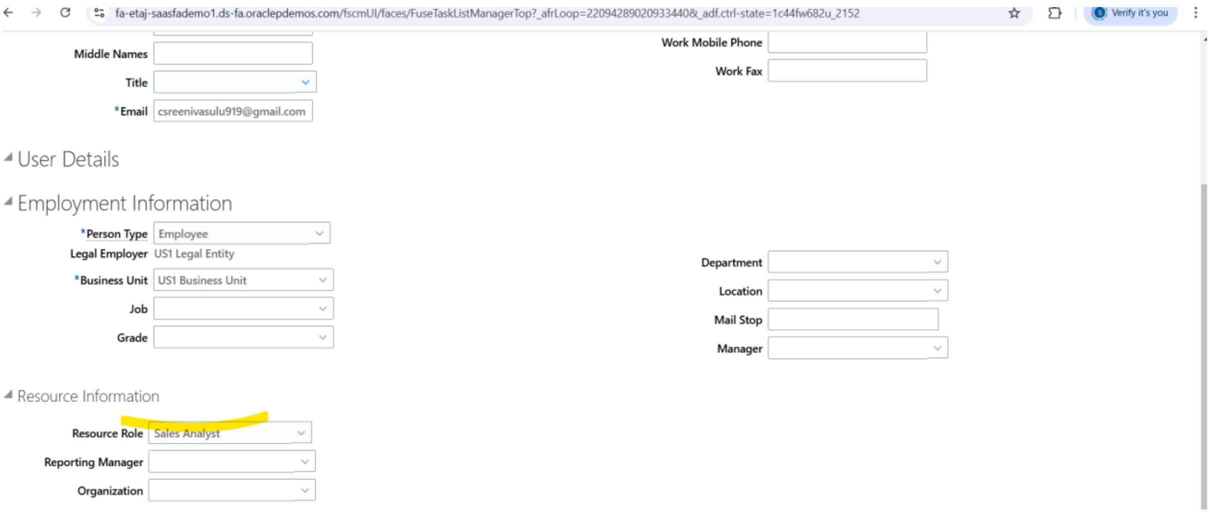
Before creating user, keep this as none. After creating the sales order, again rollback the changes.


VISION
Edit Enterprise: JIO
Review
Submit
Cancel
Enterprise Description
*Effective Start Date 1/21/25
*Name JIO
*Status Active
Action Reason
Effective End Date
Context Value
Internal Address Line
Location JIO Head Quarters
Address 3rd floor, Lake Shore Towers, Raj Bhavan Rd
MUMBAI-500082
Maharashtra
INDIA
Attachments None
Other Classifications
Organization Information EFF: Enterprise Details
Work Day Information

Submit it.

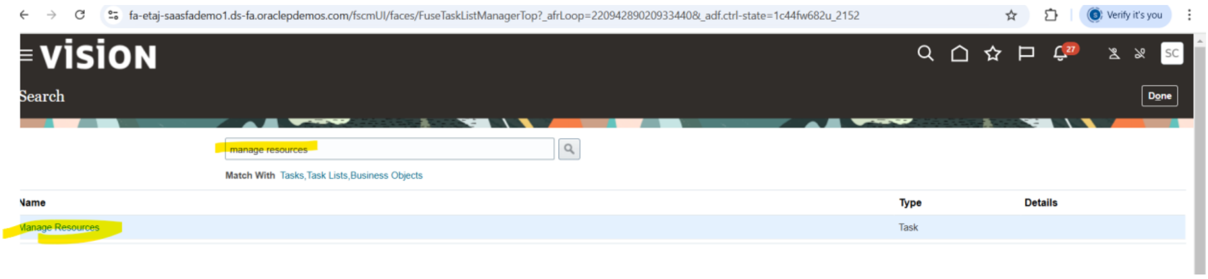

Search
Done
Manage Users
Match With Tasks,Task Lists,Business Objects
Name
Type
Details
Manage Users
Task

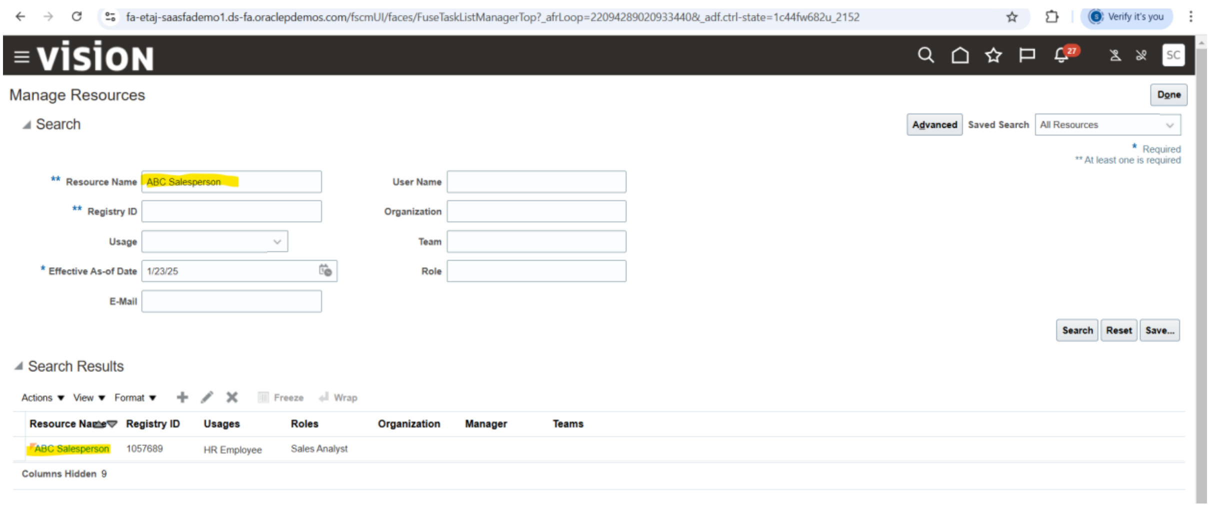

fa-etaj-saasfademo1.ds-fa.oraclepdemos.com/fscmUI/faces/FuseTaskListManagerTop?_afrLoop=220942890209334408_adf.ctrl-state=1c44fw682u_2152
VISION
Edit User:ABC Salesperson
Print User History
Save and Close
Cancel
Personal Details
*Last Name ABC Salesperson
First Name
Middle Names
Title
*Email csreenivasulu919@gmail.com
Hire Date 1/23/25
Phone
Work Mobile Phone
Work Fax
User Details
Employment Information
*Person Type Employee
Legal Employer US1 Legal Entity
*Business Unit US1 Business Unit
Job
Grade
Department
Location
Mail Stop
Manager
Resource Information
Resource Role Sales Associate
Reporting Manager
Organization
Roles
Autoprovision Roles



Save and close.

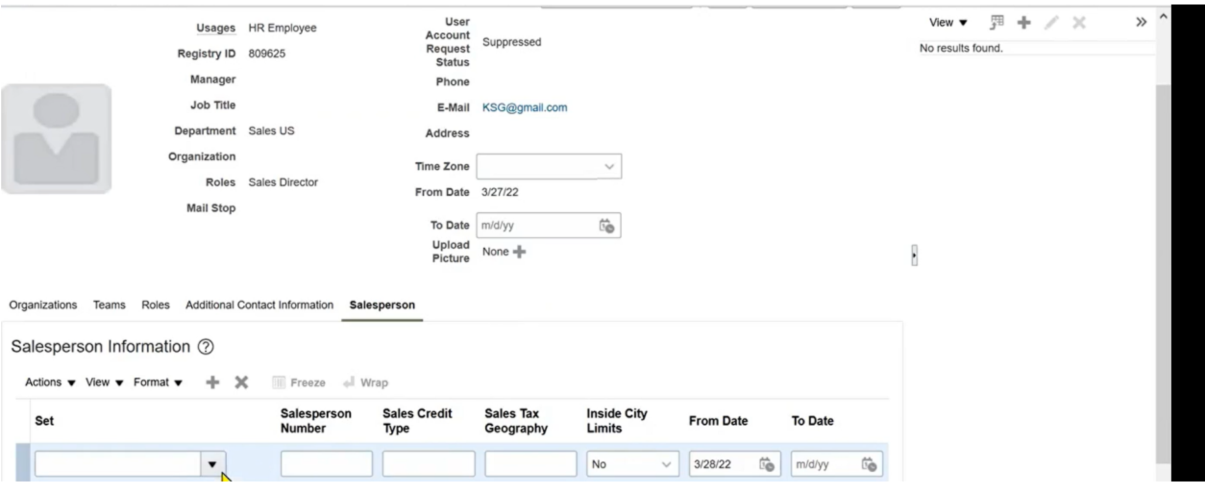
Sales persons are communicating with the customers. After creating the sales persons, we have one more step called mange resources

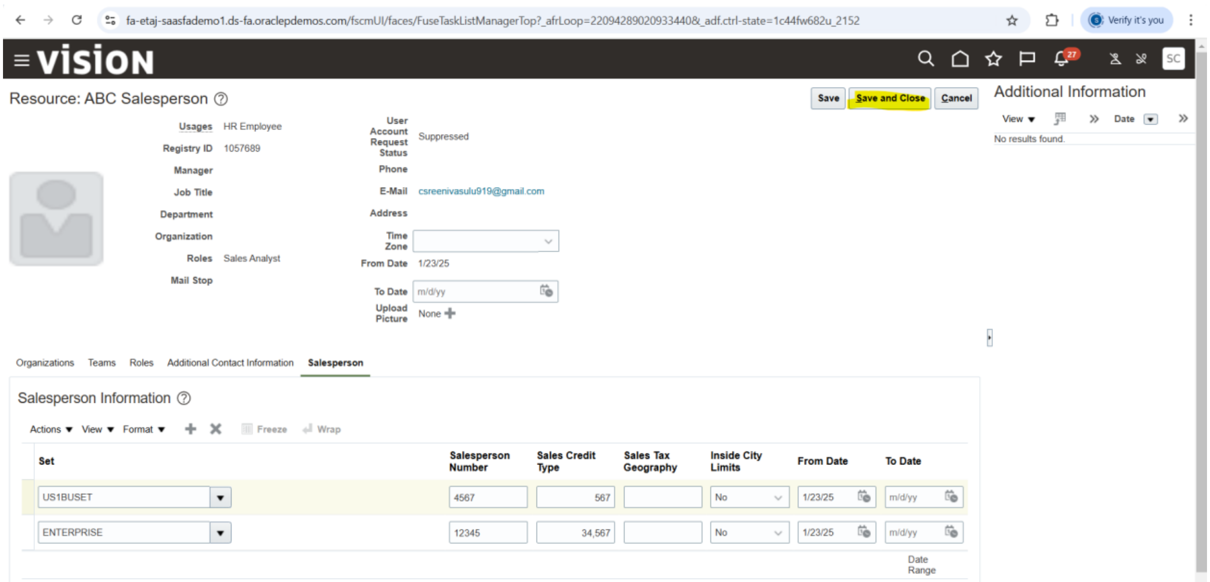




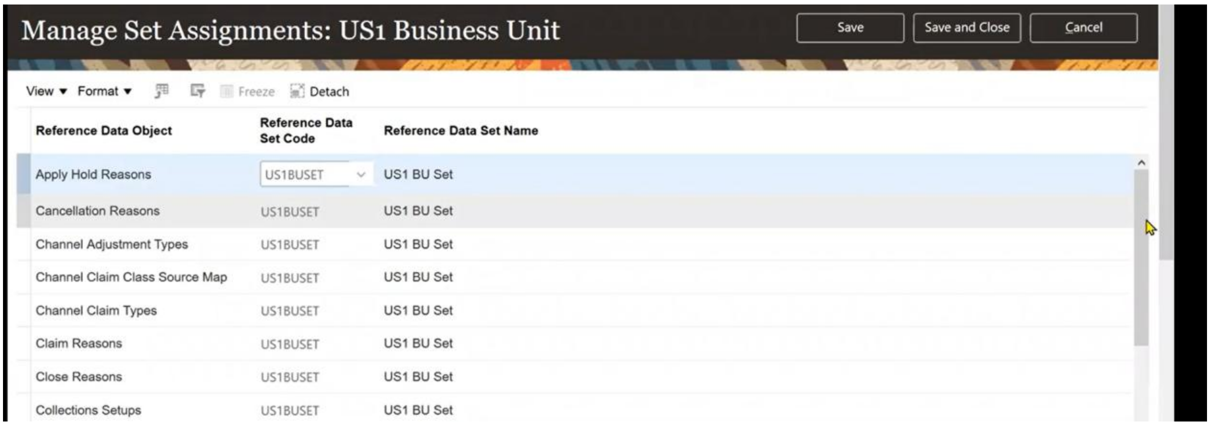
Edit, it

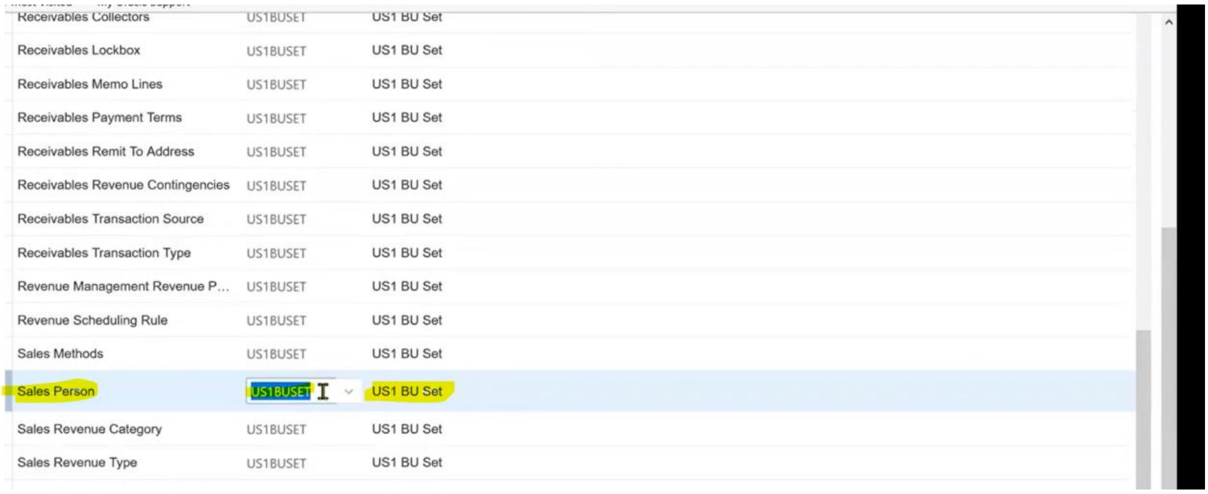
Add, this sales person to the reference data set.



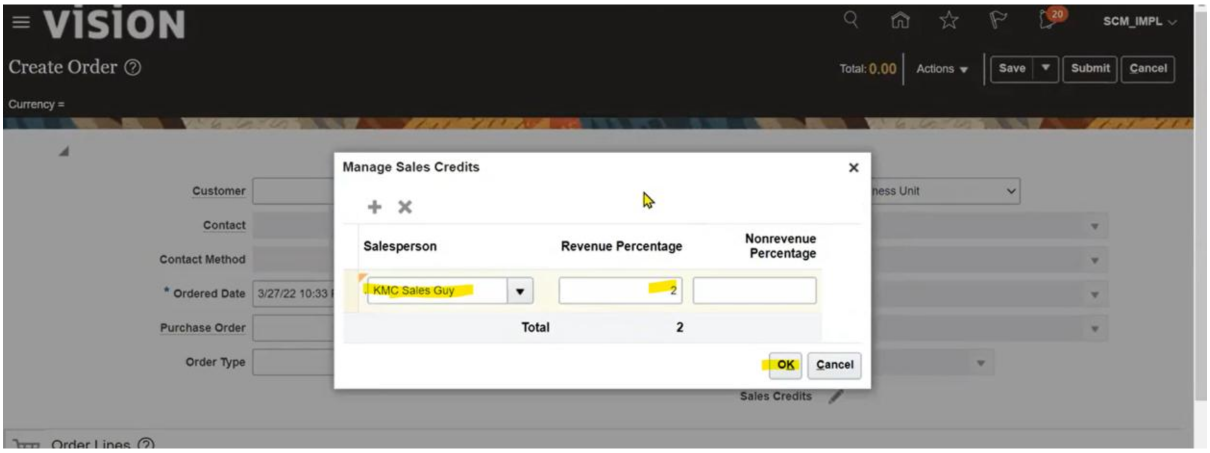


Save it. You can able to see the reference data set information for all the setups, from the below task.

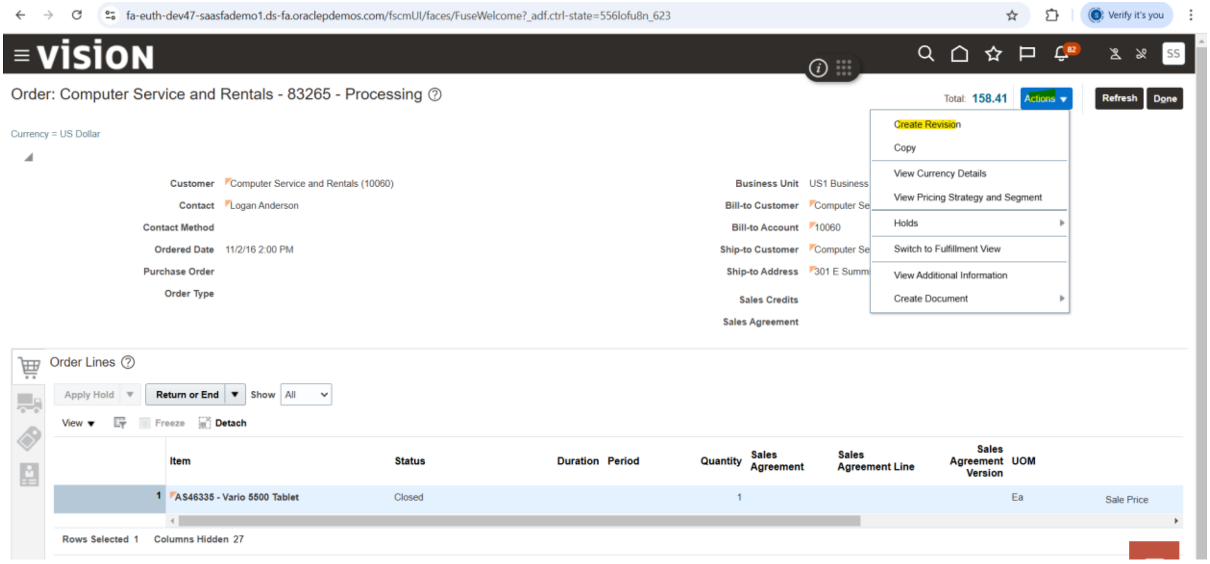




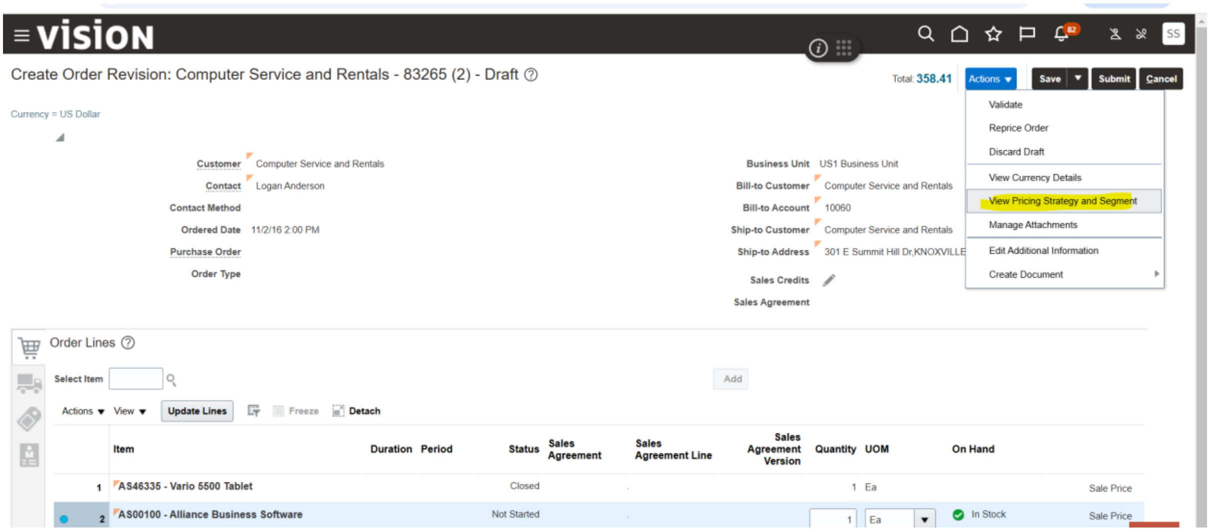
Goto Order management, add the sales person, when you want to create the order



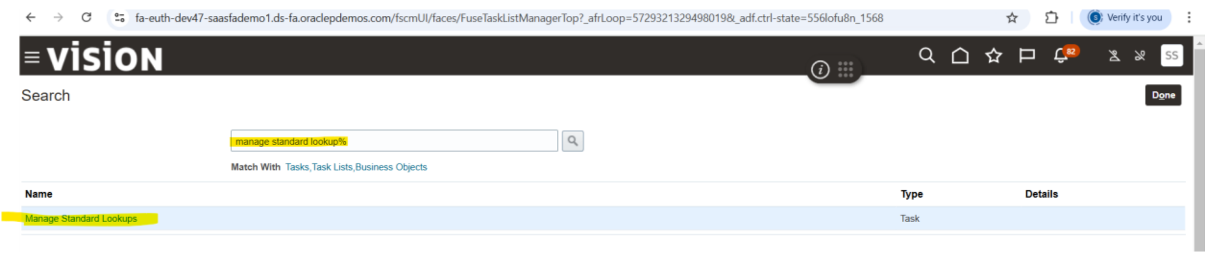
If you want to add the lines to the existing order, we can do from the Actions> create revision



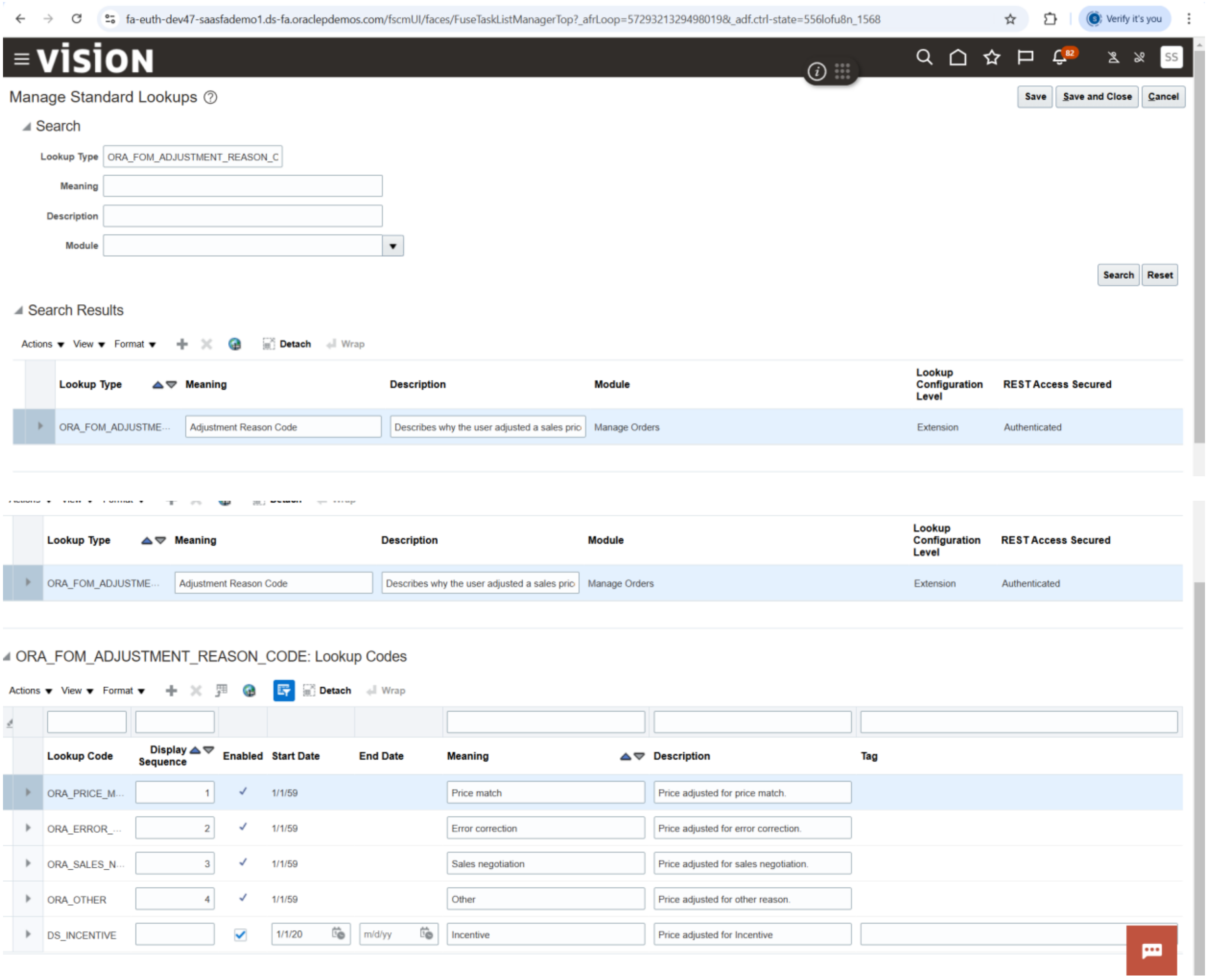
If you want to view the pricing strategy and segment, we can view from this navigation,



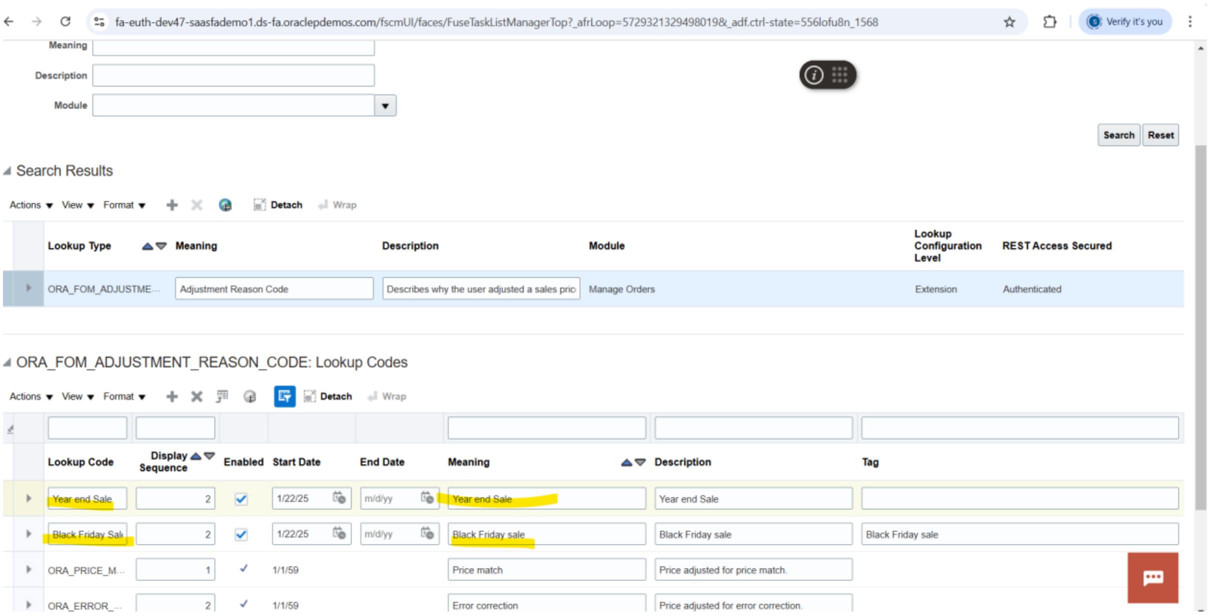
Adjustment/Discount reasons, we will create from the following lookups:



Lookup code: ORA_FOM_ADJUSTMENT_REASON_CODE



Lookup codes start with ORA are seeded ones.



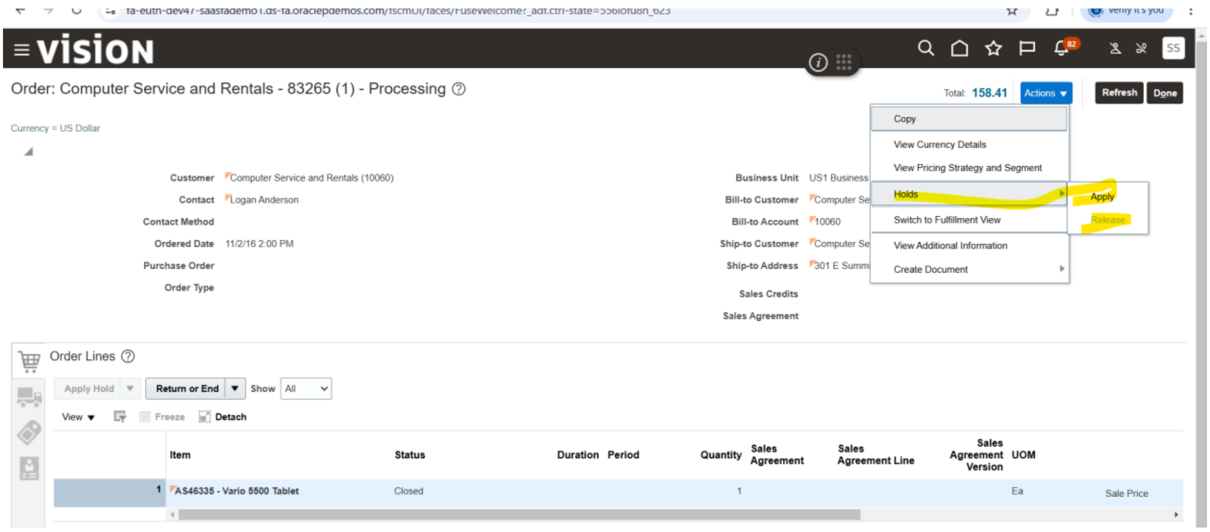
I have created reasons through the lookup code

Holds: -

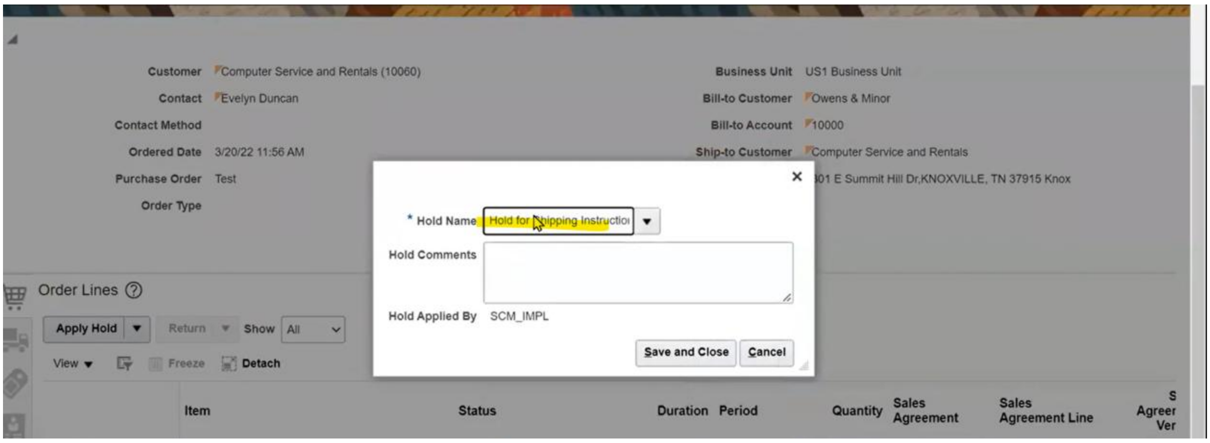
Automatic Hold – Credit Hold - automatic holds are applied automatically when the customer don't have the credit limit. We can implement the automatic holds by creating the sales order with credit limit, more than the customer have.

Manual hold – Applied manually- we are keeping the sales order hold manually for different reasons, like covid conditions, lock down, we will not ship the orders.

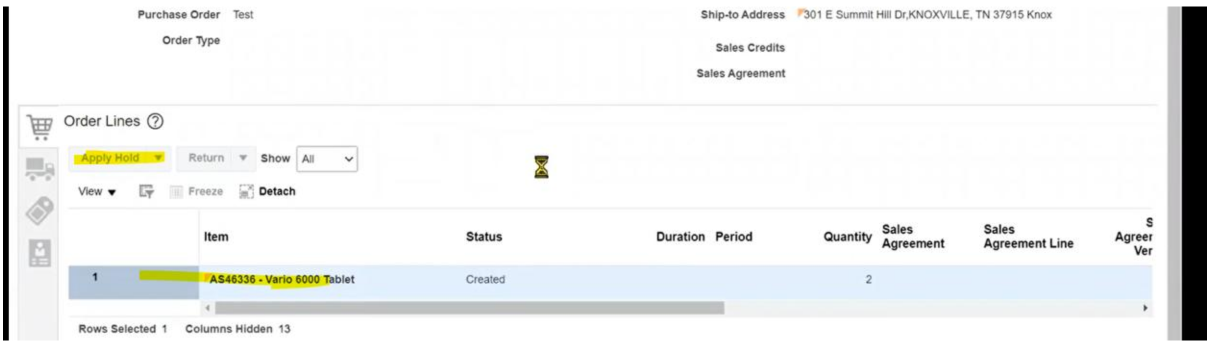
We can release the holds at header and line level, from goto actions> release the holds.



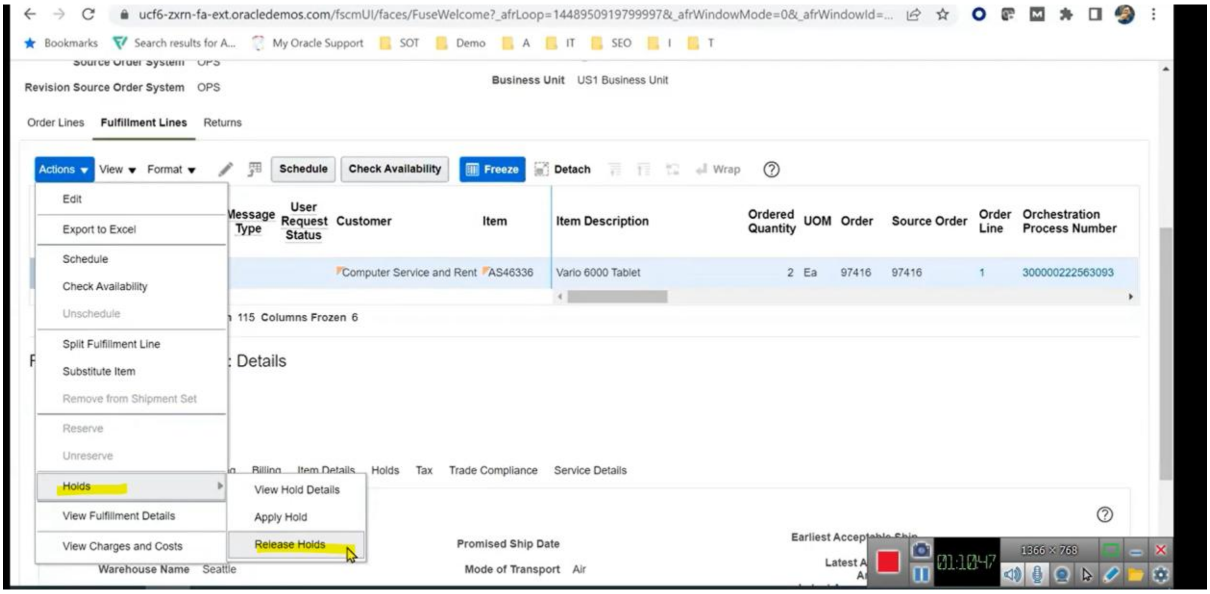
We can apply and release the holds manually.

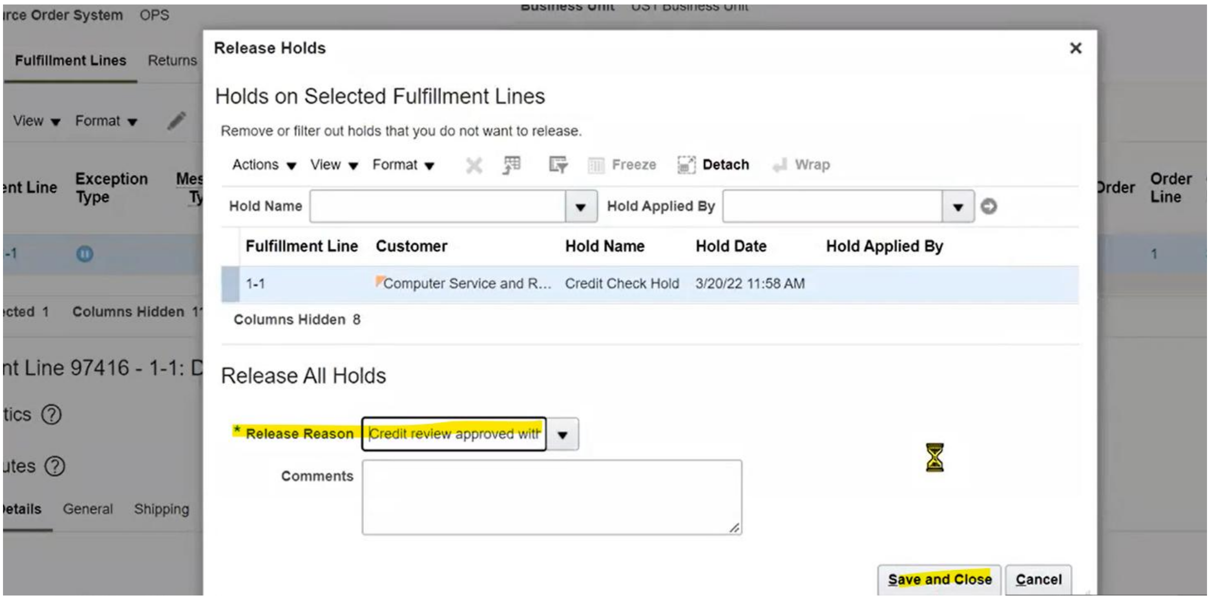


Specify the reason while applying the holds.at line level also we can apply the holds, and specify the reasons.

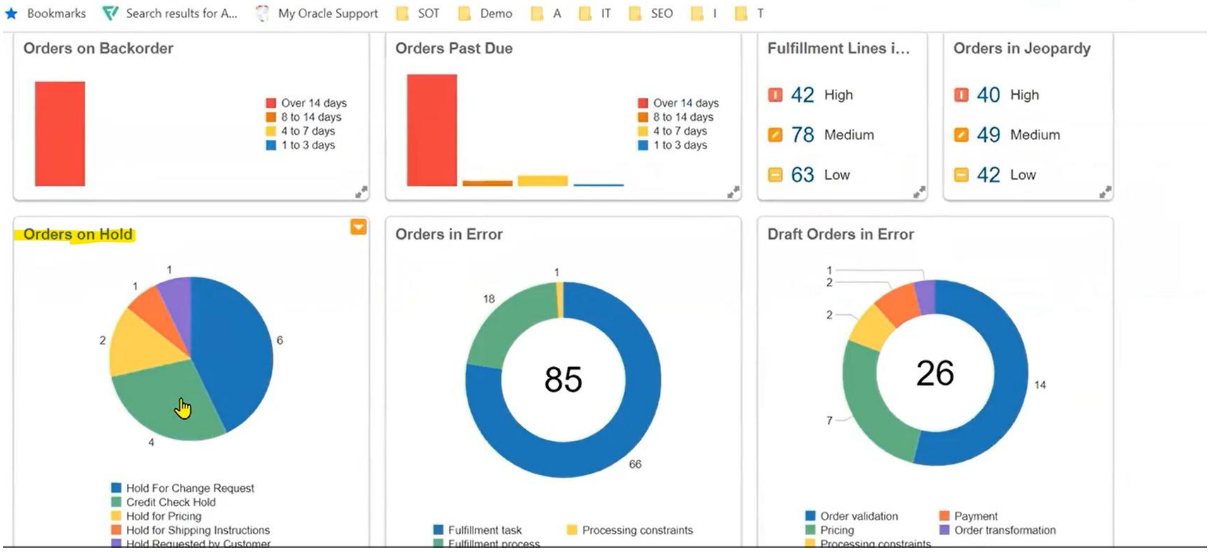


Credit holds can be released from the fulfilment lines



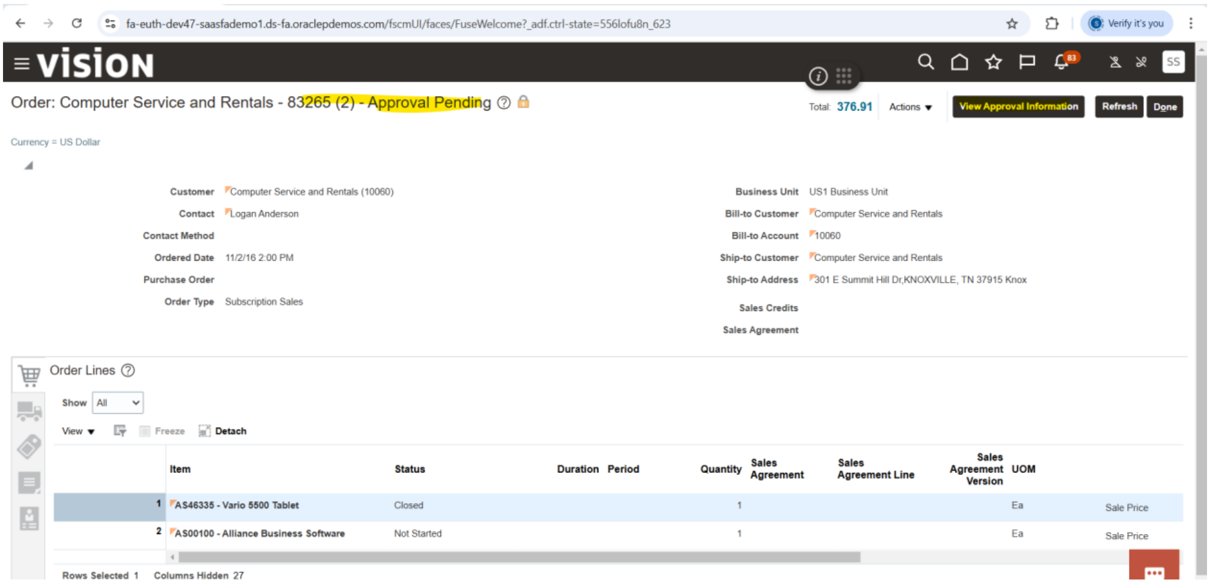


We can release by specifying the reason.

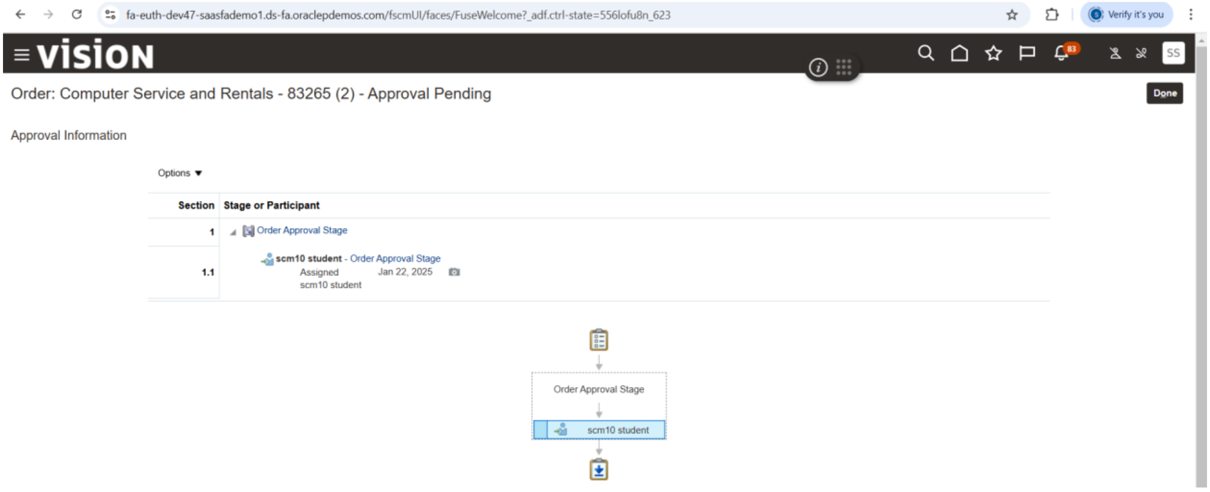


Order hold infolets are available, you can see it. How many orders are having holds, different holds.

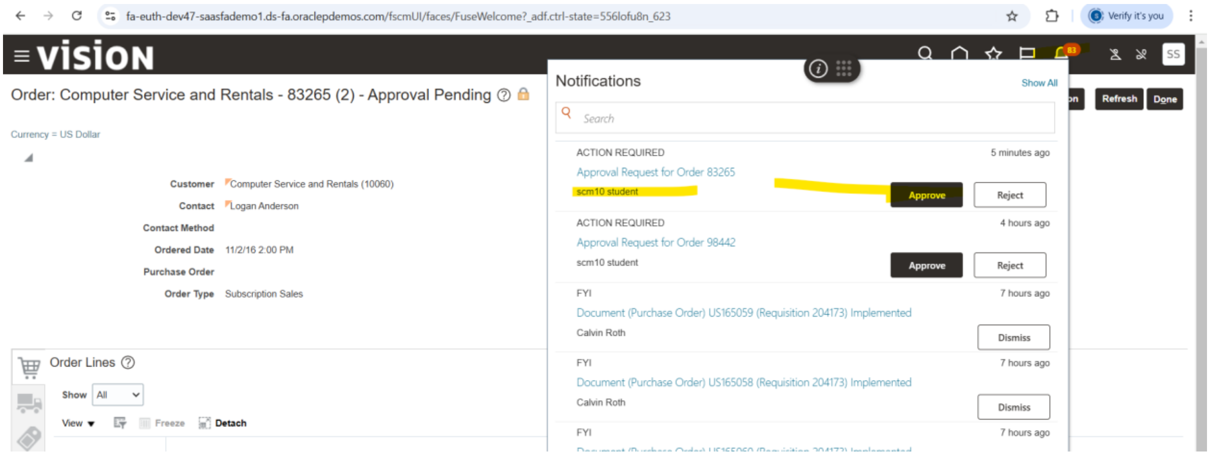
Whenever you submitted the order with approval rules, enabled, it will go for approvals, it will appear as shown below.



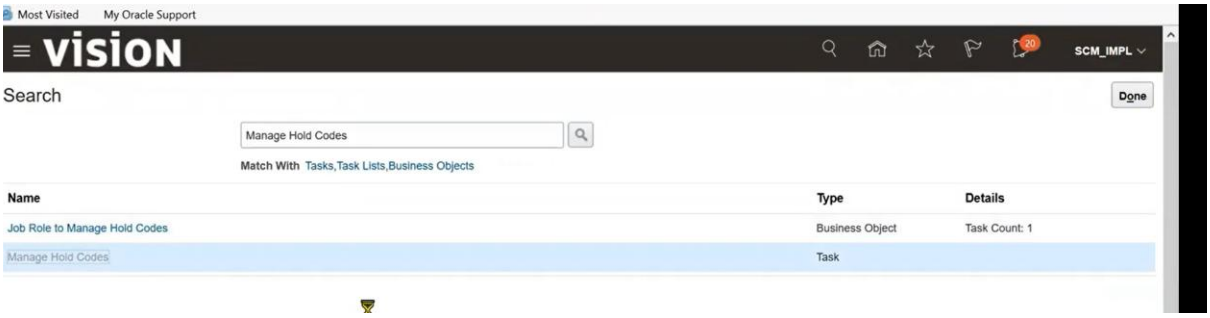
Click on view approval information, to know who needs to approve it.

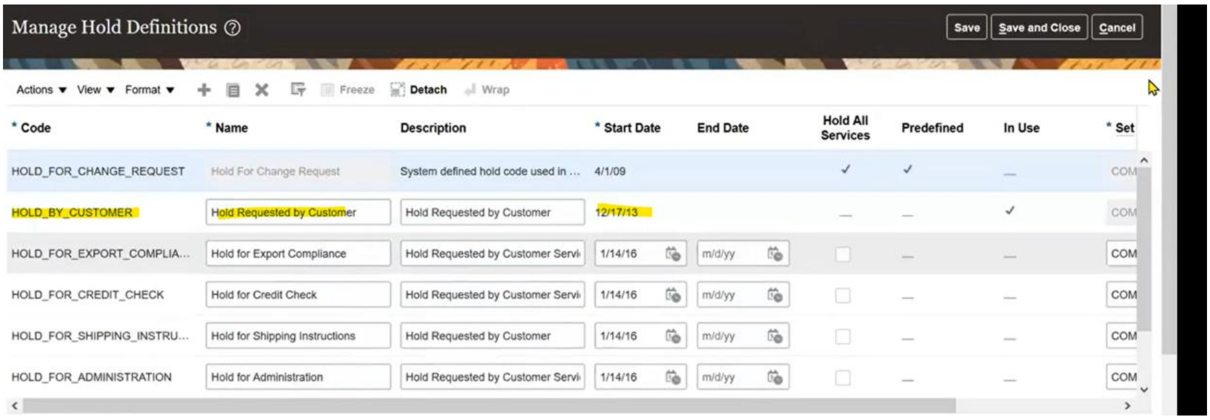


Scm10.student, needs to approve, it. Go and verify, he will get the notification, approve it.



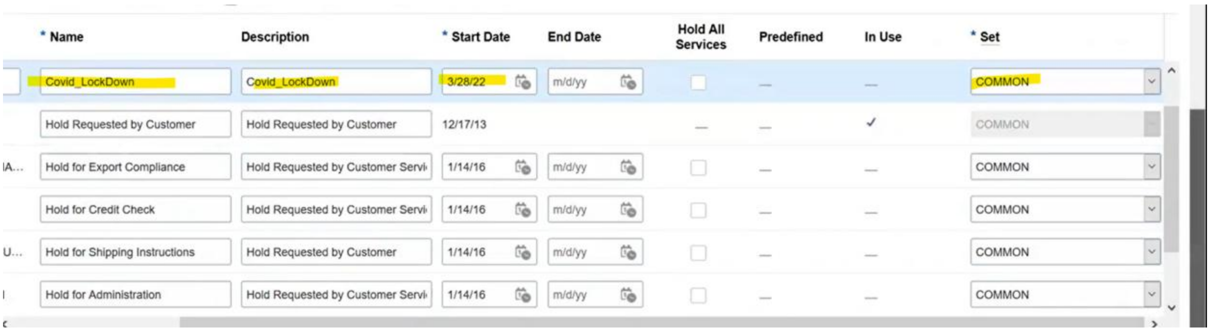
Manage hold codes: -

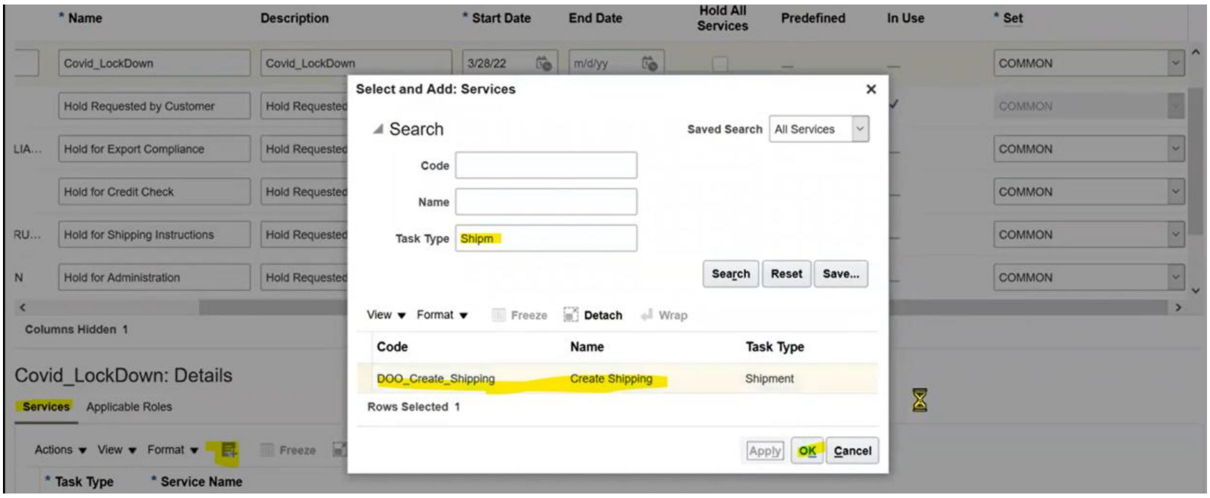




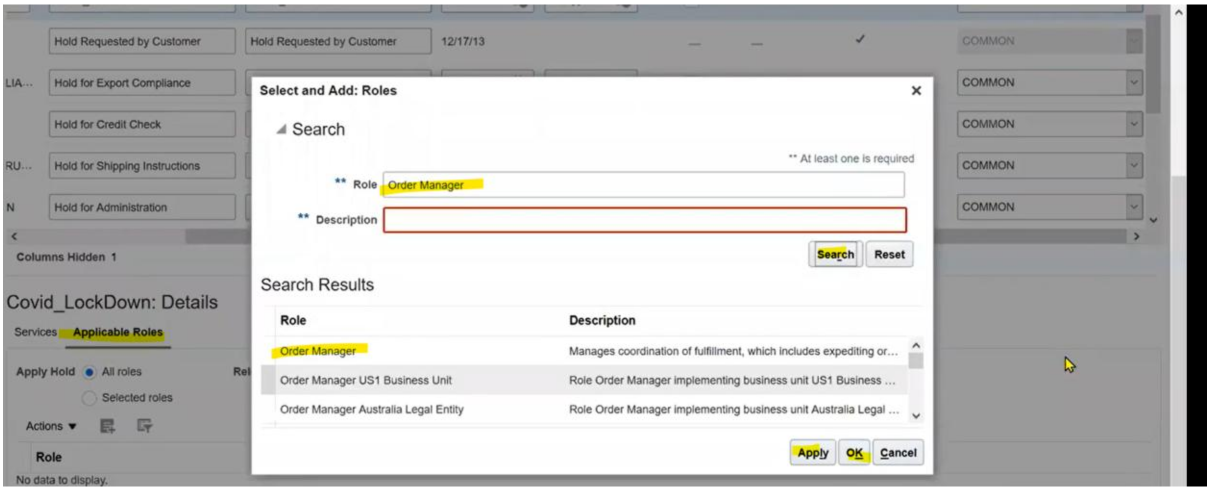
Here it contains the hold codes and reasons for the codes.

Click on +, to create a new hold reason

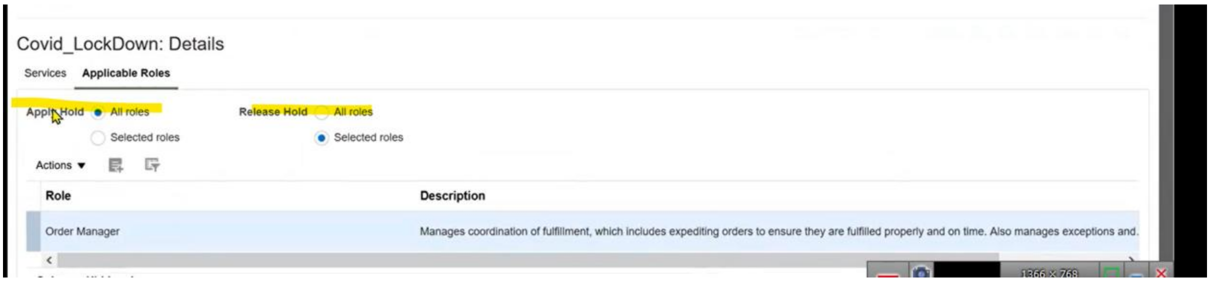




What you want to hold, specify the service, here I am holding only shipping services.

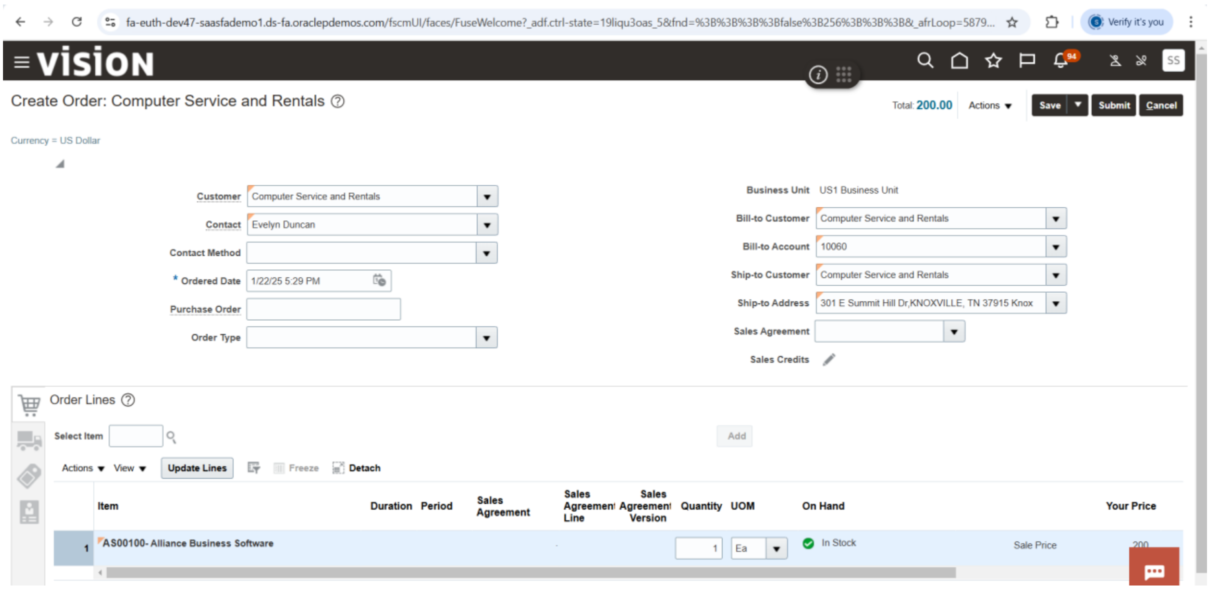


Roles required to apply holds or release holds, holds can be applied by anyone, but release can be done by only managers.



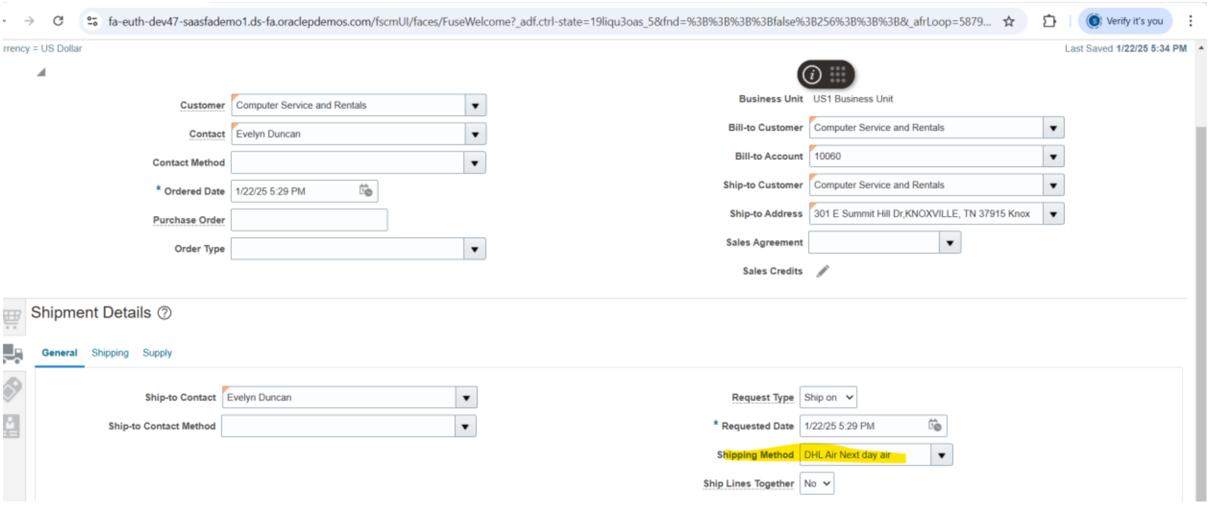
Creating a standard sales order:-

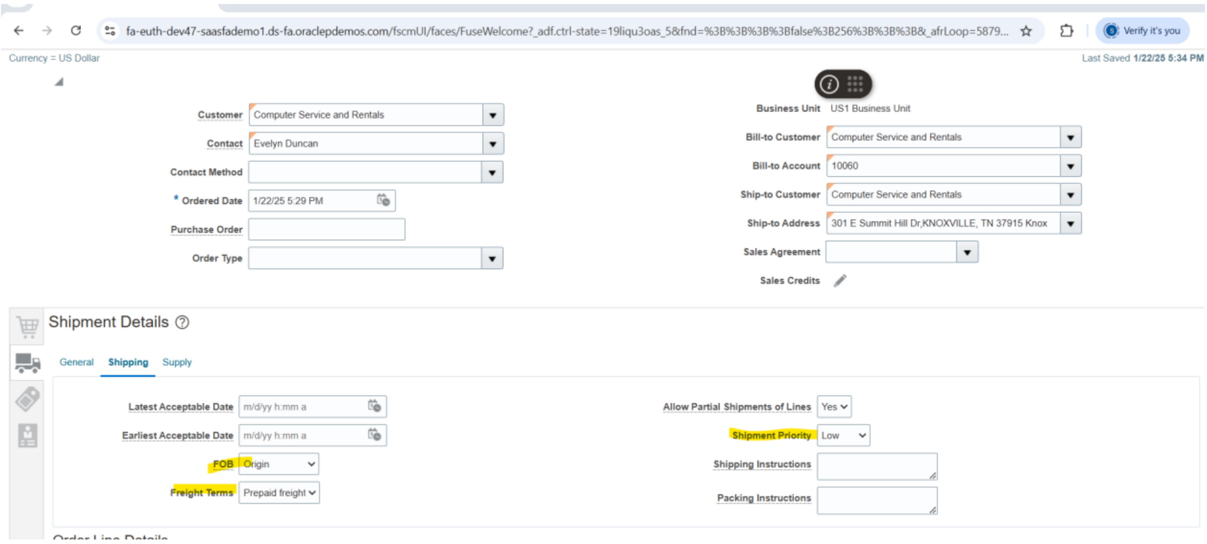
Navigation: Order management> Create order



Enter the customer details, lines(by adding the items), save. Each item cost is 200, coming form pricelist.

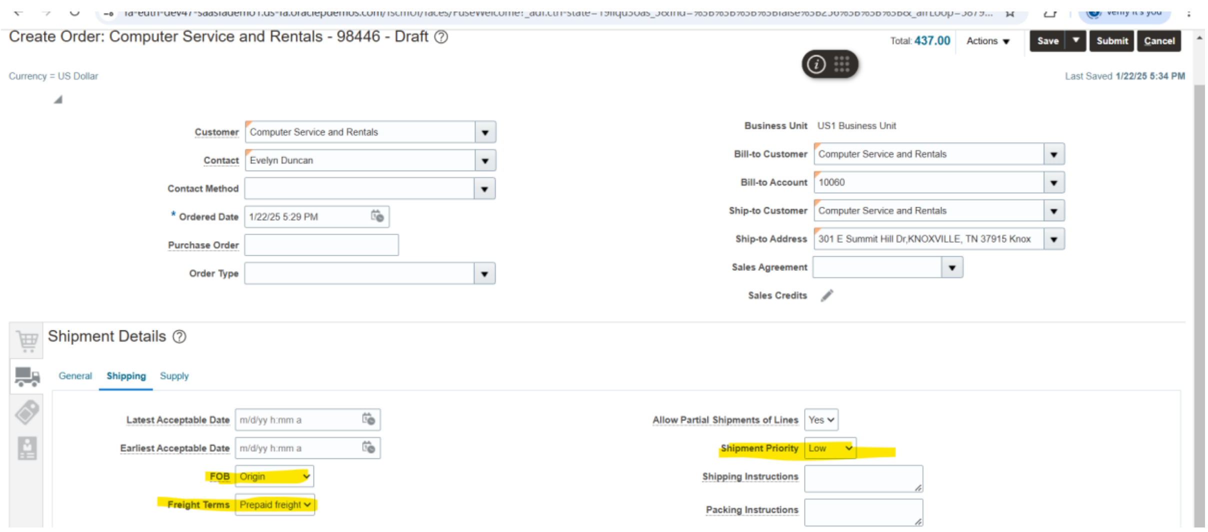
We can provide the price breaks/discounts as well.



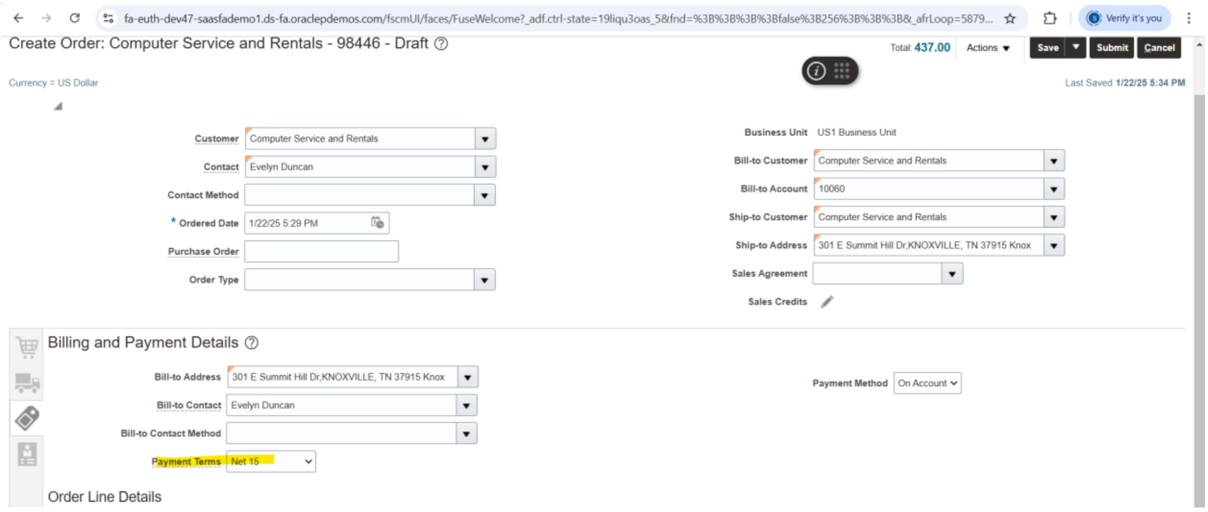


FOB, Freight Terms, Shipping Priority will be chosen.

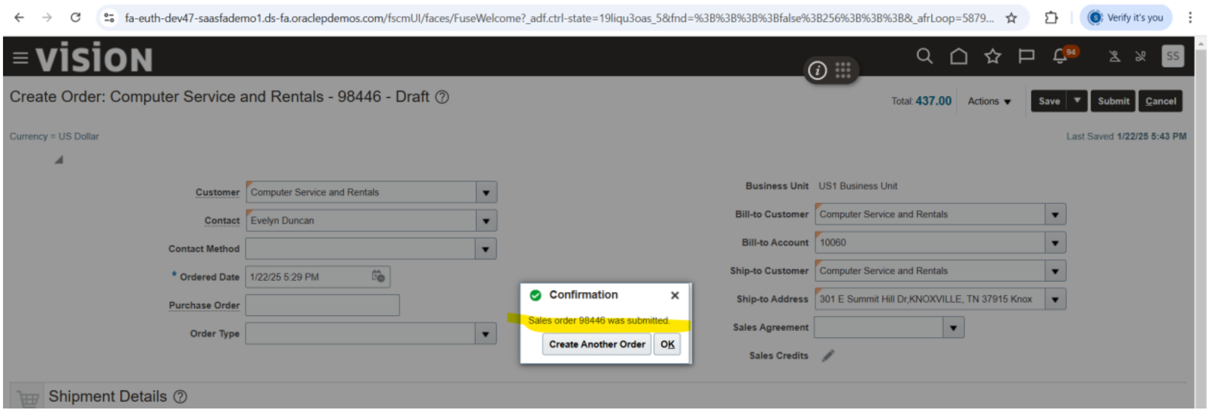
Shipping method selected here.



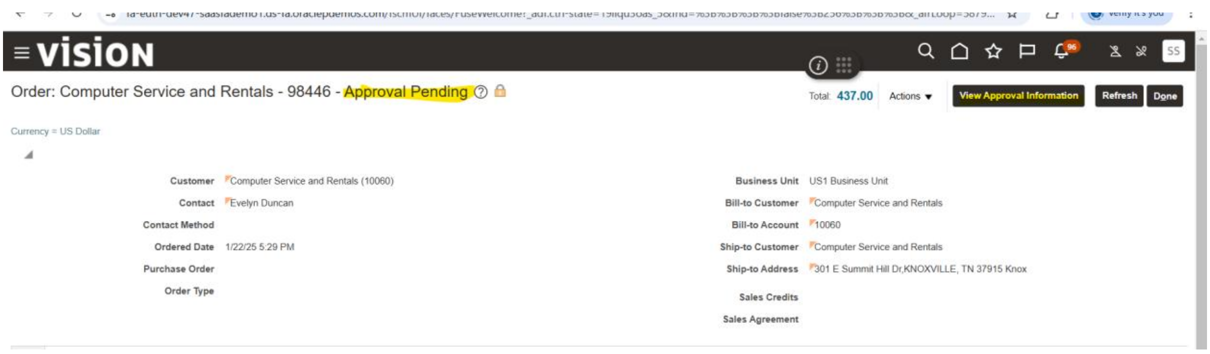
If you select, warehouse, in GOP source identification will be bypassed.



payment terms are default from the customer.

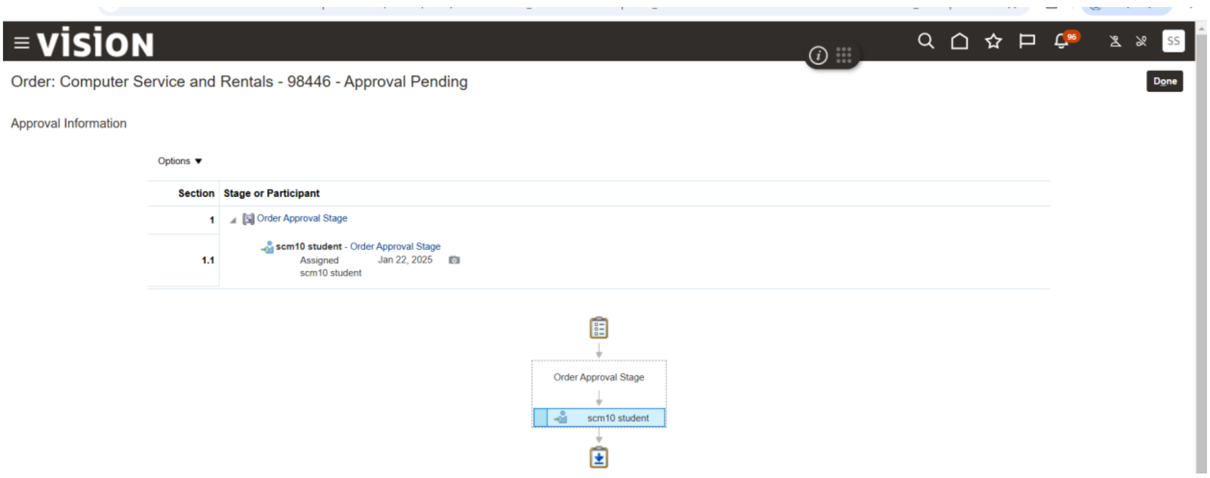


Sales order number: 98446 .

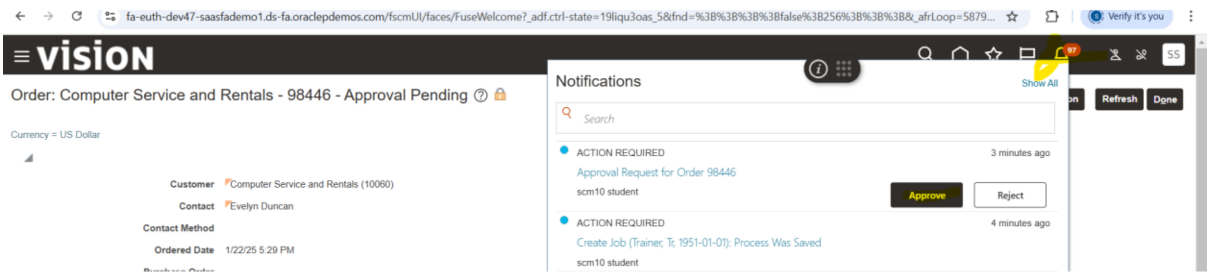


Once submitted, sales order approvals are activated, so it is going to approval pending status.

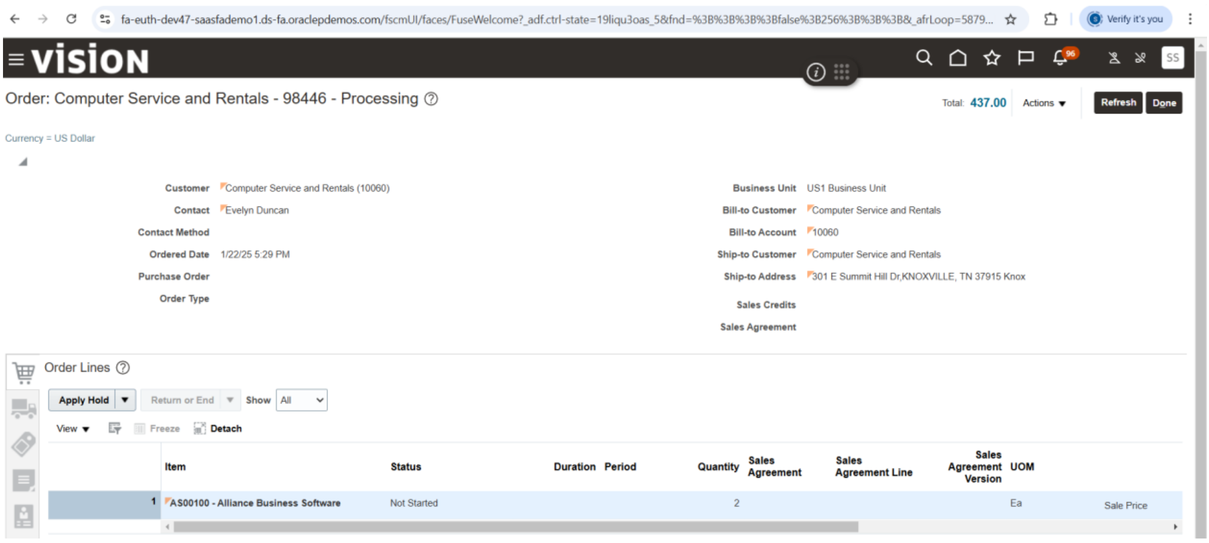
Click on view approval information.

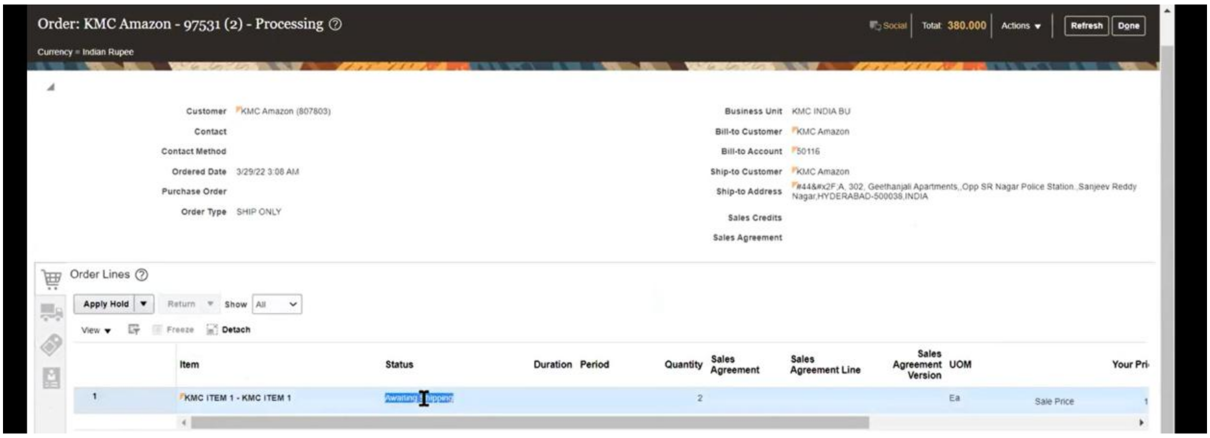


Scm10 needs to approve the sales order, until he approve, the sales order is in approval pending status,



Once scm10.student approves, the sales order, then header status will be changed from approval pending to processing





After that we will do picking and shipping process.

Order line status changes from not started→ schedule → reserve → awaiting shipping → Awaiting billing -→ billing → closed.

Some interview questions:

SI NO	Module	Question	Anwers	Basic	Inte
1	Sales order	What is sales order?	A contactual document between sales organization and consumer for supplying materia		
2		What is Standard sales order?	It is sales order in which product supplier ship the material and bill to the customer is kr		
3		What is ship only ?	When supplier ship the demo/sample product without bill, it is known as ship only .		
4		What is bill only ?	When supplier bill to customer without shipment is known as bill only .		
5		What is Return sales order?	Supplier credit to the customer for returned material is known as Return sales order.		
6		What is Return only ?	Supplier not paying for customer returned material then it is known as return only.		
7		What is Credit only?	Crediting the amount to customer for damaged product without receiving material.		
8		What is Order to Cash Cycle?	Sales Order against Source enquiry>Assess Credit Limit>Billing>Payment Receipt>postin		
9		What is drop ship sales order?	The sales organization wont deilever the product directly to the customer, sales organiz		
10		What is back to back order?	Customer place the order to organization and organization place purchase order to sup		
11		What is back order sales order?	When there is not enough quantity on hand to fullfill the sales order then order goes to		
12		What is Transfer order?	Transfer order is internal sales order to fullfill internal requisition wih document suppor		
13		explain header status in sales order?	Draft > processing > closed (update or close sales order)		
14		Explain line status in sales order?	Created > scheduled > reserved > awaiting shipping > shipped > awaiting biling > closed		
15		Can we apply discount while creating sales order? how?	yes . We can apply discount at line from drop down edit option and we can select disco		
16		What is significance of orchestration?	It is used to Identifying nest step in sales order.		