

Return Sales order: -

Return items that you have already shipped so you can move them from your customer back to your organization. You create a return order that returns the items on the original sales order.

We make item as return item

The screenshot shows the 'Create Item' form in the Oracle Vision application. The form is titled 'Create Item' and includes a 'Save' button. The item name is 'Return Item' and the description is 'Return Item'. The item class is 'Root Item Class', approval status is 'Approved', and completeness score is 'Fscm test'. The item is created by 'Fscm test' on 1/23/25 at 7:55 AM. The item status is 'Active', lifecycle phase is 'Active', user item type is 'Purchased Item', and pack type is 'Base Unit or Each'. The revision is 'A'.

The 'Specifications' tab is selected, showing the 'Item Organization: Sales and Order Management' section. The 'Order Management' section includes the following settings:

- Customer Ordered: Yes
- Customer Orders Enabled: Yes
- ATP Components: None
- Picking Rule: (dropdown)
- RMA Inspection Required: No
- Eligibility Rule: (dropdown)
- Internally Transferable: No
- Order Management Transaction Enabled: Yes
- Order Management Indivisible: (dropdown)
- Transfer Orders Enabled: No
- Check ATP: None
- Returnable: Yes
- Financing Allowed: (dropdown)
- Sales Product Type: (dropdown)
- Back-to-Back Enabled: No
- Default Sales Order Source Type: Internal

A tooltip for the 'Returnable' field states: 'Indicate whether an item is to be drop shipped. If the value is external, the item will be drop shipped. If the value is internal, it won't be drop shipped.'

Item: Return Item

Description: Return Item

Item Class: Root Item Class

Approval Status: Approved

Completeness Score

Created By: fscm.test

Item Status: Active

Lifecycle Phase: Active

User Item Type: Purchased Item

Pack Type: Base Unit or Each

Revision: A

Creation Date: 1/23/25 7:55 AM

Overview Specifications Structures Attachments **Associations** Relationships Categories Quality History

Organizations Supplier Organizations

Actions View Format Reassign Freeze Detach Wrap

Organization	Organization Name	Item Status	Primary Unit of Measure	Tracking Unit of Measure	Pricing	Secondary Unit of Measure	Defaulting Control	Positive Deviation Factor	Negative Deviation Factor	Approval Status	Change Order Line	Chai Stat
000	Operations	Active	Ea	Primary	Primary	-	-	0	0	Approved		
001	Seattle	Active	Ea	Primary	Primary	-	-	0	0	Approved		
002	Atlanta	Active	Ea	Primary	Primary	-	-	0	0	Approved		

Take the existing item(which is having pricelist etc) having returnable option at inventory level,
Assign this return item to the organizations as well.

vision Manage Receiving Parameters

Inventory Organization: 001

Change Organization Save Save and Close Cancel

General

Ship-to Exception Action: Warning

ASN Control Action: Warning

Early Receipt Tolerance in Days: 60

Late Receipt Tolerance in Days: 60

Receipt Days Exceed Action: None

Overreceipt Tolerance: 50

Overreceipt Action: None

Receipt Routing: Direct delivery

Use quality inspection plan: ☒

Allow substitute receipts: ☐

Allow unordered receipts: ☐

Enforce blind receiving: ☐

Print receipt traveler: ☐

Include closed purchase orders for receipts: ☐

Allow routing override: ☒

Process all lines together: ☐

Print shipping documents for returns to suppliers: ☒

Print shipping documents for drop ship orders: ☐

Print shipping documents for return material authorizations: ☒

Publish transactional business events: ☐

Allow defaulting of lots and serial numbers from ASN: ☐

Allow defaulting of lots and serial numbers from transfer order: ☐

Autocreate deliveries for expense destination receipts: ☐

Autocreate deliveries for PAR location receipts: ☐

Receipt Number

Generation: Automatic

Type: Numeric

Check the receiving parameters as well for orgs you want to receive the return orders, like 001 and 002.

Add receiving agent role to our user.

The screenshot shows the Oracle Vision 'Manage Data Access for Users' interface. A 'Create Data Access for Users' dialog is open, allowing configuration for the user 'scm.test'. The dialog includes fields for Role (Receiving), Security Context (Inventory orga), and Security Context Value (001). Below the dialog, the 'Order Lines' section displays a table with one line item: 'KMC ITEM 1 - KMC ITEM 1' with status 'Shipped' and quantity '2'. The 'Return' button is highlighted in the 'Order Lines' toolbar.

Sales order created, for the return item, it is shipped., on the closed status order also we can create return sales order.

Select the line after shipped, click on return, **return All lines.**

The screenshot shows the 'Return Items' dialog in Oracle Vision. The dialog displays a table with one row: 'KMC ITEM 1' with return quantity '1', returnable quantity '2', and return type 'Ea'. A dropdown menu is open for the 'Return Type' field, showing various return options. The 'Return for credit and return the item' option is selected.

Select the return item, out of 2 quantities, return quantity is 1, return type (select the return for credit and return the item).

Return type: Customer return the item, and we have to pay the amount for the customer.

Customer: KMC Amazon (807803) Business Unit: KMC INDIA BU
 Contact: KMC Amazon Bill-to Customer: KMC Amazon
 Contact Method: Bill-to Account: 50116
 Ordered Date: 3/29/22 3:08 AM Ship-to Customer: KMC Amazon
 Purchase Order: Ship-to Address: #44/A, 302, Geethanjali Apartments,,Opp SR Nagar Police Station,,Sanjeev Reddy Nagar,HYDERABAD-500038,INDIA

Order Type: SHIP ONLY

Return Items

* Return Item	* Return Quantity	Returnable Quantity	* Return UOM	* Return Type	Return Reason	Original Sales Order	Original
1 KMC ITEM 1	1	2	Ea	Return for credit and return the item	The item is damaged	97531	

Create Order Cancel

Return reason: the item is damaged.

Customer: KMC Amazon (807803) Business Unit: KMC INDIA BU
 Contact: KMC Amazon Bill-to Customer: KMC Amazon
 Contact Method: Bill-to Account: 50116
 Ordered Date: 3/29/22 3:08 AM Ship-to Customer: KMC Amazon
 Purchase Order: Ship-to Address: #44/A, 302, Geethanjali Apartments,,Opp SR Nagar Police Station,,Sanjeev Reddy Nagar,HYDERABAD-500038,INDIA

Order Type: SHIP ONLY

Return Items

* Return Item	* Return Quantity	Returnable Quantity	* Return UOM	* Return Type	Return Reason	Original Sales Order	Original
1 KMC ITEM 1	1	2	Ea	Return for credit and return the item	The item is damaged	97531	

Create Order Cancel

Click on create order.

Return order is created, how can we identify the amount shows in negative.

ORACLE

Create Order: KMC Amazon

Currency = Indian Rupee

Total: -190.000 Actions Save Submit Cancel

Customer: KMC Amazon Business Unit: KMC INDIA BU
 Contact: KMC Amazon Bill-to Customer: KMC Amazon
 Contact Method: Bill-to Account: 50116
 * Ordered Date: 3/30/22 2:48 AM Ship-to Customer: KMC Amazon
 Purchase Order: Ship-to Address: #44/A, 302, Geethanjali Apartments,,
 Order Type: SHIP ONLY Sales Agreement: Sales Credits:

Total

Total List Price	0.000
Discount	0.000
Total Net Price	0.000
Shipping	0.000
Total Tax	0.000
Total Credit	-190.000
Pay Now	-190.000

Done

ORACLE

Create Order: KMC Amazon - 97536 - Approval Pending ?

Currency = Indian Rupee

Business Unit: KMC INDIA BU

Customer: KMC Amazon

Contact: [Empty]

Contact Method: [Empty]

* Ordered Date: 3/30/22 2:48 AM

Purchase Order: [Empty]

Order Type: SHIP ONLY

Bill-to Customer: KMC Amazon

Bill-to Account: 50116

Ship-to Customer: KMC Amazon

Ship-to Address: #44/A, 302, Geethanjali Apartments,,

Sales Agreement: [Empty]

Sales Credits: [Empty]

Order Lines ?

Confirmation

Sales order 97536 was submitted.

Create Another Order OK

Submit the sales order, sales order number will be created.

Order: KMC Amazon - 97536 - Processing ?

Currency = Indian Rupee

Business Unit: KMC INDIA BU

Customer: KMC Amazon (807803)

Contact: [Empty]

Contact Method: [Empty]

Ordered Date: 3/30/22 2:48 AM

Purchase Order: [Empty]

Order Type: SHIP ONLY

Bill-to Customer: KMC Amazon

Bill-to Account: 50116

Ship-to Customer: KMC Amazon

Ship-to Address: #44/A, 302, Geethanjali Apartments,,Opp SR Nagar Police Station,,Sanjeev Reddy Nagar,HYDERABAD-500038,INDIA

Sales Credits: [Empty]

Sales Agreement: [Empty]

Order Lines ?

Apply Hold Return Show All

Refresh Done

ORACLE

Order: KMC Amazon - 97536 - Processing ?

Currency = Indian Rupee

Business Unit: KMC INDIA BU

Customer: KMC Amazon (807803)

Contact: [Empty]

Contact Method: [Empty]

Ordered Date: 3/30/22 2:48 AM

Purchase Order: [Empty]

Order Type: SHIP ONLY

Bill-to Customer: KMC Amazon

Bill-to Account: 50116

Ship-to Customer: KMC Amazon

Ship-to Address: #44/A, 302, Geethanjali Apartments,,Opp SR Nagar Police Station,,Sanjeev Reddy Nagar,HYDERABAD-500038,INDIA

Sales Credits: [Empty]

Sales Agreement: [Empty]

Order Lines ?

Apply Hold Return Show All

View Pricing Strategy and Segment

Pricing Segment: Distributor PS

Segment Explanation: The applicable pricing segment for this transaction is Pricing Segment=Distributor PS Precedence=100 because Revenue Potential=null Customer Size=null Cost To Serve=null Customer Value=Distributor Customer Rating=null

Strategy Name: KMC Distributor PST

Strategy Explanation: The applicable pricing strategy for this transaction is Pricing Strategy=KMC Distributor PST Precedence=10 because Channel Method=null Transaction Type=null Pricing Segment=Distributor PS

Done

Based on the pricing strategy it will identify the

In case return sales orders, separate pricelist called return pricelist will be created.

Sales price, return price is different, then we have to create return price list.

Most Visited My Oracle Support

ORACLE

Order: KMC Amazon - 97536 - Processing ⓘ

Currency = Indian Rupee

Customer: KMC Amazon (807803)

Contact

Contact Method

Ordered Date: 3/30/22 2:48 AM

Purchase Order

Order Type: SHIP ONLY

Business Unit: KMC INDIA BU

Bill-to Customer: KMC Amazon

Bill-to Account: F50116

Ship-to Customer: KMC Amazon

Ship-to Address: #44&x2F A, 302, Geethanjali Apartments, Opp SR Nagar Police Station, Sanjeev Reddy Nagar, HYDERABAD-500038, INDIA

Sales Credits

Sales Agreement

Order Lines ⓘ

Apply Hold Return Show All

View Freeze Detach

Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement UOM
1	KMC ITEM 1 - KMC ITEM 1 Original Order 97531	Awaiting Receiving		1			

Goto switch to fulfilment view

Order: KMC Amazon - 97536 - Processing ⓘ

Customer: KMC Amazon

Customer Registry ID: 807803

Purchase Order

Status: Processing

User Request Status

On Hold

Source Order System: OPS

Revision Source Order System

Source Order Revision: 1

Source Order Revision Date

Source Order: 97536

Source Document Type: Sales order

Ordered Date: 3/30/22 2:48 AM

Processes Assigned: Yes

Message Type

Business Unit: KMC INDIA BU

Customer Contact

Reason for Change Order

Comments

Canceled Date

Attachments: None

Additional Information ⓘ

Order Lines Fulfillment Lines Returns ⓘ

Actions View View Format Apply Hold Release Holds Freeze Detach T T Wrap ⓘ

Order Line	Item	Item Description	Ordered Quantity	UOM	Status	User Request Status	On Hold	Additional Information
1	KMC ITEM 1	KMC ITEM 1	1	Ea	Processing			ⓘ

Goto the returns, we can able to see the return order lines.

Customer: KMC Amazon

Customer Registry ID: 807803

Order: 97536

Process Transaction Value: -190,000 INR

Process Standardized Value: -2.71 USD

Status: Awaiting Receiving

Locked: No

Jeopardy Score

Jeopardy Reason

Jeopardy Priority

Message Type

Actual Start Date: 3/30/22 2:49 AM

Actual Completion Date

Planned Completion Date

Planned Fulfillment Date

Actual Fulfillment Date

Required Fulfillment Date

Ordered Date: 3/30/22 2:48 AM

Paused Tasks

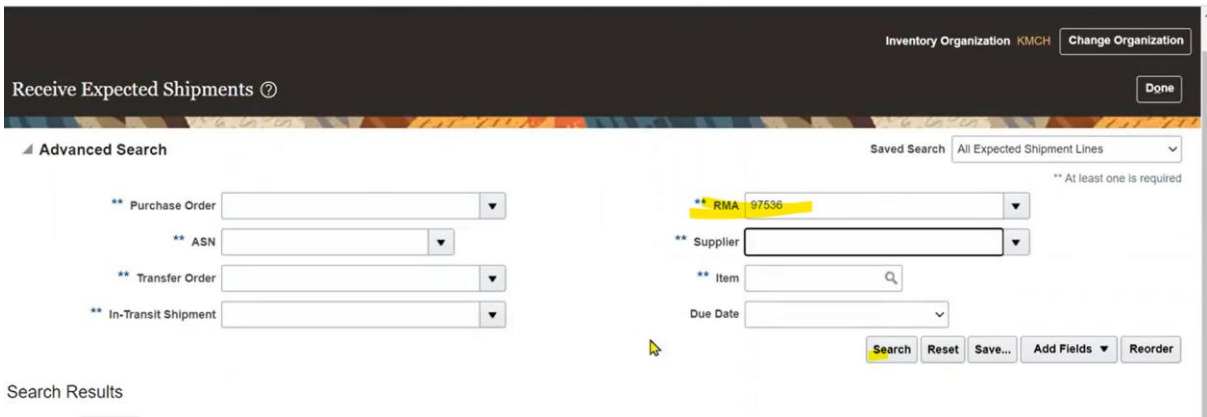
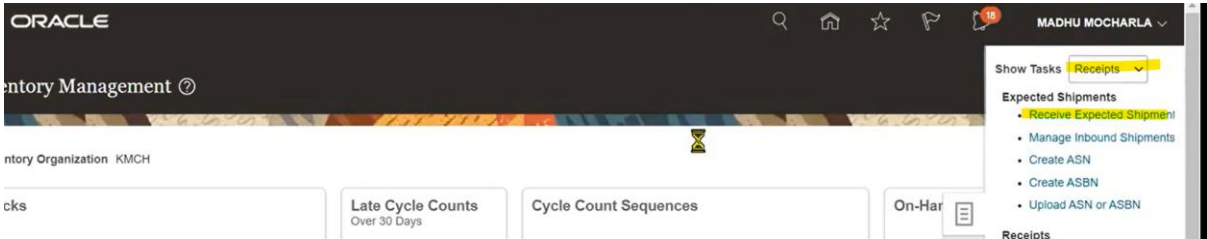
Orchestration Plan Fulfillment Lines

View Actions Zoom To...

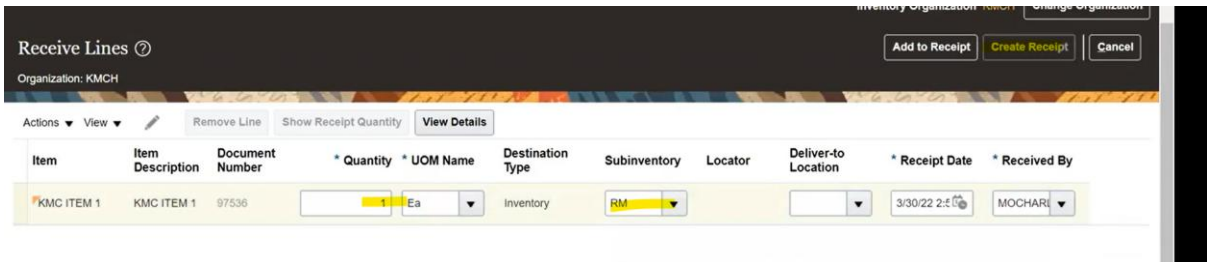
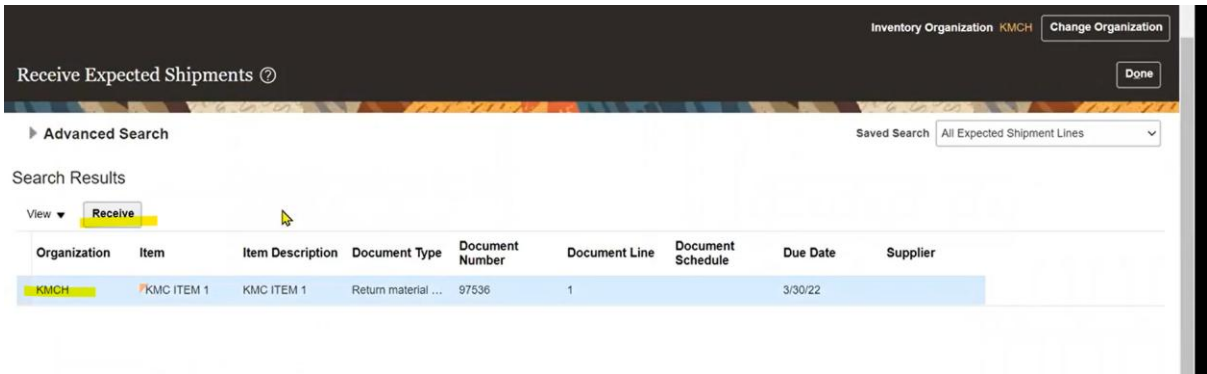
Task Types: All tasks ⓘ

Task Progress	Task	Status	Mar 27, '22	03-29	03-30	03-31	04-01	04-02	04-03	04-04	04-05	04-06
Return Receipt	Return Receipt	Awaiting Receiving										
Asset Management	Asset Management	Not Started										
Invoice	Invoice	Not Started										

We need to receive the goods from the customer.



This is return material ,enter the order.



Create receipt.

Submit it

Once receipt created, the inventory team has to inform to the order entry team about receipt done.

Name	Process ID	Status	Scheduled Time	Submission Time
Age User Context Relevancy Feed			12:00 AM UTC	3/30/22 12:01 AM UTC
Smart Action Auto Ranking			12:00 AM UTC	3/30/22 12:01 AM UTC
Refresh Order Promising Analytics			7:09 PM UTC	3/29/22 7:09 PM UTC
Generate Global Order Promising Data S			7:06 PM UTC	3/29/22 7:06 PM UTC

Job: send receipt confirmation.

When you run the program, the sales order line will be changed from awaiting receipt → return.

Click on submit.

Overview

Search

Search Results

View: ☒ Flat List ☐ Hierarchy

Actions: **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log

Name	Process ID	Status	Scheduled Time	Submission Time
Send Receipt Confirmation	3179676	Succeeded	3/30/22 2:58 AM UTC	3/30/22 2:58 AM UTC
Age User Context Relevancy Feed	3179514	Wait	3/31/22 12:00 AM UTC	3/30/22 12:01 AM UTC
Smart Action Auto Ranking	3179513	Wait	3/31/22 12:00 AM UTC	3/30/22 12:01 AM UTC
Refresh Order Promising Analytics	3179236	Succeeded	3/29/22 7:09 PM UTC	3/29/22 7:09 PM UTC

Once the program is succeeded. You can go and verify the sales order line status.

Order: KMC Amazon - 97536 - Processing

Currency = Indian Rupee

Customer: KMC Amazon (807803)
Contact
Contact Method
Ordered Date: 3/30/22 2:48 AM
Purchase Order
Order Type: SHIP ONLY

Business Unit: KMC INDIA BU
Bill-to Customer: KMC Amazon
Bill-to Account: 50116
Ship-to Customer: KMC Amazon
Ship-to Address: #44/A, 302, Geethanjali Apartments, Opp SR Nagar Police Station, Sanjeev Reddy Nagar, HYDERABAD-500038, INDIA
Sales Credits
Sales Agreement

Order Lines

Apply Hold Return Show All

View Freeze Detach

Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM
1 KMC ITEM 1 - KMC ITEM 1 Original Order 97531	Delivered			1				Ea

Refresh the sales order, the line status will be changed to delivered.

Order: KMC Amazon - 97536 - Processing

Currency = Indian Rupee

Customer: KMC Amazon (807803)
Contact
Contact Method
Ordered Date: 3/30/22 2:48 AM
Purchase Order
Order Type: SHIP ONLY

Business Unit: KMC INDIA BU
Bill-to Customer: KMC Amazon
Bill-to Account: 50116
Ship-to Customer: KMC Amazon
Ship-to Address: #44/A, 302, Geethanjali Apartments, Opp SR Nagar Police Station, Sanjeev Reddy Nagar, HYDERABAD-500038, INDIA
Sales Credits
Sales Agreement

Order Lines

Apply Hold Return Show All

View Freeze Detach

Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM
1 KMC ITEM 1 - KMC ITEM 1 Original Order 97531	Delivered			1				Ea

You can able to see the return order number for the return sales order.

We will create invoice (credit memo) by running the program **import auto invoice program**, automatically application will create the credit memo for the amount reported in the sales order.

In another case, only damage items are return, we will not create any credit memo.

In another case, no need to return the item, it's already damaged, our executive verified, only we will credit the amount to the customer.

➔ In the above scenario, I have created return sales order for the standard sales order, which was shipped.

Now I want to create return sales order directly without referencing the original sales order.

vision
Create Order: Computer Service and Rentals
Currency = US Dollar

Customer: Computer Service and Rentals
Contact: Evelyn Duncan
Contact Method: [Dropdown]
Ordered Date: 1/24/25 3:34 AM
Purchase Order: [Text Field]
Order Type: [Dropdown]

Business Unit: US1 Business Unit
Bill-to Customer: Computer Service and Rentals
Bill-to Account: 10060
Ship-to Customer: Computer Service and Rentals
Ship-to Address: 301 E Summit Hill Dr, KNOXVILLE, TN 37915 Knox
Sales Agreement: [Dropdown]
Sales Credits: [Edit Icon]

Order Lines

Select Item [Search] Add

Actions View Update Lines Freeze Detach

Apply Hold
Release Holds
Add Unreferenced Return Lines

Duration	Period	Sales Agreement	Sales Agreement Line	Sales Agreement Version	Quantity	UOM	On Hand	Your Price
----------	--------	-----------------	----------------------	-------------------------	----------	-----	---------	------------

Enter the business unit and customer details, go to line level.

Actions> Add Unreferenced Return Lines

vision
Create Order: Computer Service and Rentals - 98453 - Draft
Currency = US Dollar

Customer: Computer Service and Rentals
Business Unit: US1 Business Unit

Add Unreferenced Return Lines

Actions View Format Freeze Detach

* Item	* Covered Item	* Return Quantity	* UOM	* Return Type	Duration	Period	Cancellation Effective Date
AS00100		1	Ea	Return for credit			

Columns Hidden: 4

Add Cancel

Add the item, return type is return for credit only.

vision
Create Order: Computer Service and Rentals - 98453 - Draft
Currency = US Dollar

Customer: Computer Service and Rentals
Contact: Evelyn Duncan
Contact Method:
Ordered Date: 1/24/2025 3:34 AM
Purchase Order:
Order Type:
Business Unit: US1 Business Unit
Bill-to Customer: Computer Service and Rentals
Bill-to Account: 10090
Ship-to Customer: Computer Service and Rentals
Ship-to Address: 301 E Summit Hill Dr KNOXVILLE, TN 37915 Knox
Sales Agreement:
Sales Credits:
Total: -200.00
Actions: Save Submit Cancel

Order Lines
Select Item:
Add
Actions: View Update Lines Freeze Detach
Duration Period Sales Agreement Sales Agreement Line Sales Agreement Version Quantity UOM On Hand Your Price Amount Cancellation Effective Date Project Details
1 1 Ea -200 -200.00

Price is coming in negatives,

This is the way how to create return sales order, without referencing the original order.

vision
Create Order: Computer Service and Rentals - 98453 - Draft
Currency = US Dollar
Last Saved 1/24/25 3:41 AM
Total: -218.50
Actions: Save Submit Cancel

Customer: Computer Service and Rentals
Contact: Evelyn Duncan
Contact Method:
Ordered Date: 1/24/25 3:34 AM
Purchase Order:
Order Type:
Business Unit: US1 Business Unit
Bill-to Customer: Computer Service and Rentals
Bill-to Account: 10090
Ship-to Customer: Computer Service and Rentals
Ship-to Address: 301 E Summit Hill Dr KNOXVILLE, TN 37915 Knox
Sales Agreement:
Sales Credits:
Confirmation
Sales order 98453 was submitted
Create Another Order OK

Order Lines
Select Item:
Add
Actions: View Update Lines Freeze Detach
Duration Period Sales Agreement Sales Agreement Line Sales Agreement Version Quantity UOM On Hand Your Price Amount Cancellation Effective Date Project Details
1 1 Ea -200 -200.00

Here I want to create sales orders based on new conditions.

Sales Order Scenarios	LeadTime Based ATP Rule - To Generate Schedule Ship Date
	Partial Picking, Partial Shipping
	Try with No onhand for the item
	Auto (one step process)
	Bill Only Sales Order - Shippable - No
	Ship Only Sales Order - Invoiced Enabled - No, Invoiced - No
	Partial shipment should not be allowed (Sales Order -> Allow Partial Shipment -> No)
	Create a sales order in foreign currency (not in the functional currency)
	Split the Order Line
	Try to apply Manual/Automatic Discounts
	Try the Shipping Charges PL to apply Freight chages to the sales order
	Try with Bulk Release Sales Orders
	Try credit holds, Release the holds

1. If we try use **Lead time Based ATP rules**, the Schedule ship date is calculated, we can able to see the schedule ship date from the fulfilment lines.

Orchestration Plan: **Fulfillment Lines**

Actions: View, Format, Schedule, Check Availability, Freeze, Detach, Wrap

Fulfillment Line	Exception Type	Message Type	User Request Status	Customer	Item	Item Description	Ordered Quantity	UOM	Order	Source Order	Order Line	Orchestration Process Number	Status	Orchestration Process
1-1				Computer Service and Rent	AS4751500	Vision Slimline 5100 Tablet, 128 GB, 8"	1	Ea	90342	90342	1	300000176049935	Closed	DOO_OrderFulfillmentGe

Rows Selected 1 Columns Hidden 121 Columns Frozen 6

Fulfillment Line 90342 - 1-1: Details

Analytics ?

Attributes ?

Supply Details General Shipping Billing Item Details Holds Tax Trade Compliance Service Details

Warehouse	002	Promised Ship Date		Earliest Acceptable Ship Date	
Warehouse Name	Atlanta	Mode of Transport	Air	Latest Acceptable Arrival Date	
Subinventory		Service Level	Next day air	Latest Acceptable Ship Date	
Requested Arrival Date		Allow Split Shipments	✓	Reserved Quantity	1
Requested Ship Date	10/31/18 8:43 AM	Override Schedule	—	Reservable	—
Scheduled Arrival Date	3/19/19 6:59 PM	Allow Item Substitution	—	Carrier	DHL
Scheduled Ship Date	3/18/19 6:59 PM	Substitution Reason			
Promised Arrival Date		Scheduling Reason			

vision

Order: Computer Service and Rentals - 98453 - Approval Pending ?

Total: -218.00 Actions View Approval Information Refresh Done

Currency = US Dollar

Customer	Computer Service and Rentals (10060)	Business Unit	US1 Business Unit
Contact	Evelyn Duncan	Bill-to Customer	Computer Service and Rentals
Contact Method		Bill-to Account	10060
Ordered Date	1/24/25 3:34 AM	Ship-to Customer	Computer Service and Rentals
Purchase Order		Ship-to Address	301 E Summit Hill Dr, KNOXVILLE, TN 37915 Knox
Order Type		Sales Credits	
		Sales Agreement	

Order Lines ?

Show All View Freeze Detach

Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM	Version
AS00100 - Alliance Business Software	Not Started			1				Ea	Sale Price

vision

Order: Computer Service and Rentals - 98453 - Processing ?

Total: -218.00 Actions Refresh Done

Currency = US Dollar

Customer	Computer Service and Rentals (10060)	Business Unit	US1 Business Unit
Contact	Evelyn Duncan	Bill-to Customer	Computer Service and Rentals
Contact Method		Bill-to Account	10060
Ordered Date	1/24/25 3:34 AM	Ship-to Customer	Computer Service and Rentals
Purchase Order		Ship-to Address	301 E Summit Hill Dr, KNOXVILLE, TN 37915 Knox
Order Type		Sales Credits	
		Sales Agreement	

Order Lines ?

Apply Hold Return or End Show All View Freeze Detach

Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM	Version	Your Price	Amount	Ship-to Site	Cancellation Effective Date	Project
AS00100 - Alliance Business Software	Awaiting Billing			1				Ea		Sale Price	-200	-200.00		

Total amount is updated, and the header status also processing.

After refresh, the line status is awaiting billing.

Order: Computer Service and Rentals - 98453 - Processing

Customer: Computer Service and Rentals (10000)
Contact: Evelyn Duncan
Contact Method
Ordered Date: 1/24/25 3:34 AM
Purchase Order
Order Type

Business Unit: US1 Business Unit
Bill-to Customer: Computer Service and Rentals
Bill-to Account: 10060
Ship-to Customer: Computer Service and Rentals
Ship-to Address: 301 E Summit Hill Dr, KNOXVILLE, TN 37915 Knox
Sales Credits
Sales Agreement

Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM	Version
1 AS00100 - Alliance Business Software Original Order: No reference	Awaiting Billing			1				Ea	Sale Price

Sales order created without any reference sales order.

- Partial Picking and partial shipping:** - we can do partial picking and shipping by entering the partial amount while picking and shipping instead of entering the full amount.
Out of 100 quantities, we picked only 60 quantity and shipping those 60 quantities.
we picked only 60 quantity and shipping those 30 quantities.
- Try with No on hand for the item:** - The sales order goes to the backorder.
- Auto One-step Process:-** Pick release, pick confirm, shipments, ship confirms all in one step.
- Bill only sales order:** Shippable – no
- Ship only sales order-** Invoiced Enabled – No, Invoice – No
- Partial Shipment should not be allowed** → (Sale order → Allow Partial Shipment → No)

Customer: [Dropdown]
Contact: [Dropdown]
Contact Method: [Dropdown]
Ordered Date: 1/24/25 6:22 AM
Purchase Order: [Text]
Order Type: [Dropdown]

Business Unit: [Dropdown]
Bill-to Customer: [Dropdown]
Bill-to Account: [Dropdown]
Ship-to Customer: [Dropdown]
Ship-to Address: [Dropdown]
Sales Agreement: [Dropdown]
Sales Credits: [Text]

Shipment Details

General Shipping Supply

Latest Acceptable Date: m/d/yy h:mm a
Earliest Acceptable Date: m/d/yy h:mm a
FOB: [Dropdown]
Freight Terms: [Dropdown]

Allow Partial Shipments of Lines: Yes [No]
Shipment Priority: [No] Yes [Yes]
Shipping Instructions: [Text]
Packing Instructions: [Text]

Order Line Details

Over Item	Quantity	UOM	Requested Date	Ship-to Address	Shipping Method	Shipping Charge	Shipment Set	Availability Status	Ship-to Customer
	1								

Check whether we can able to do partial picking after the above setup set as no.

- Create sales order in Foreign Currency** (not in the functional currency)

Actions> Edit Currency details

The screenshot shows the Oracle 'Create Order' form. The 'Currency' field is set to 'US Dollar'. The form includes fields for Customer, Contact, Contact Method, Ordered Date (1/24/25 6:22 AM), Purchase Order, and Order Type. On the right, there are dropdowns for Business Unit (US Business Unit), Bill-to Customer, Bill-to Account, Ship-to Customer, Ship-to Address, Sales Agreement, and Sales Credits. The total is 0.00.

This is our functional currency.

The screenshot shows the same Oracle 'Create Order' form, but with the 'Actions' menu open. The 'Edit Currency Details' option is highlighted. The 'Business Unit' field is now empty, indicating a change in the functional currency.

We can change it to foreign currency, by Goto actions> edit currency details.

The screenshot shows the 'Edit Currency Details' dialog box open. The 'Order Currency' dropdown is set to 'US Dollar'. The 'Conversion for Accounting' section shows 'Type' as 'Pound Sterling' and 'Rate' as 'US Dollar'. The 'Date' field is set to 'm/d/yy h:mm a'.

We can change to any foreign currency other than the functional before submitting the sales order.

8. Split the sales order line: -

For example, the line is having 2 items for the sales order, we are splitting one line request date is one date, and another one item requested date is another, and also ship to address is also different.

9. Try to apply manual/automatic discount: ,manually we know from line level we can apply the discounts, whereas automatic discounts can also create, once created discounts apply automatically.

10. Try with Bulk release of sales orders: release the bulk sales orders.

11. Try credit hold, release holds:- manual, automatic holds release and apply

12. **Without SR and SA:-** without sourcing rule and sourcing assignment for the item, we can fulfil the order by providing supply information in the sales order, so which means SA, SR is not required, simply provide the organization in the warehouse. (SR and SA are not mandatory)
13. **ATP rule** is mandatory, if there is no ATP rule, by using pre transformation rules, make requested date as schedule ship date.
14. **Ship all the lines together:** if the below setup is Yes, we can ship all the lines together

The screenshot shows the 'Create Order: Computer Service and Rentals' form in Oracle Fusion. The form is divided into several sections. The top section contains customer and business unit information. The 'Customer' is 'Computer Service and Rentals' and the 'Contact' is 'Evelyn Duncan'. The 'Business Unit' is 'US1 Business Unit'. The 'Ship to Customer' is also 'Computer Service and Rentals'. The 'Ship to Address' is '301 E Summit Hill Dr KNOXVILLE, TN 37915 Knox'. The 'Ordered Date' is '1/24/25 12:34 PM'. The 'Requested Date' is also '1/24/25 12:34 PM'. The 'Shipping Method' is 'Ship on'. The 'Ship Lines Together' checkbox is highlighted in yellow and set to 'Yes'.

All the lines has to be shipped at a time. It won't allow one line at a time.
The below are the pending Sales orders, we need to discuss.

Dropship sales order:-

Sales order → submit → Purchase requisition(application automatically creates)
→ Purchase order (ship to location is customer location)
→ Ap invoice to the customer → Payment to the supplier → GL
→ AR invoice to the customer → Receive payment form the customer → GL (post to ledger)

Back-to-Back sales order: - (Buy)

Sales order → submit → Purchase requisition(application automatically creates)
→ Purchase order (ship to location is our warehouse location) → Receive → Picking → shipping → AR invoice to the customer → receive payment from the customer → GL (post in the general ledger).
→ Ap invoice to the customer → Payment to the supplier → GL

Back-to-back make order: -(Make)

Sales order → Submit → Work Order → Complete MFG → Inventory → picking → shipping
→ AR Invoice to the customer → receive (Receive payment form the customer) → GL.

Transfer order:- (Internal Sales order) → to do this costing is mandatory.

Internal Requisition → Transfer order → Pick → shipping → Intercompany invoice is generated.

Standard Sales Order -> Ship & Billing
Ship Only
Bill Only

Dropship Sales Order

Sales Order -> Submit -> Purchase Requisition -> Purchase Order (Ship To Loc: Customer Loc) -> AP Invoice -> Payment -> GL
AR Invoice -> Receive -> GL

Back To Back (Buy)

Sales Order -> Submit-> Purchase Requisition -> Purchase Order (Ship To Loc: Warehouse) -> Receive -> Picking -> Ship
AR Invoice -> Receipt -> GL
AP Invoice -> Payment -> GL

Back To Back (Make)

Sales Order -> Submit -> Work Order -> Complete MFG -> Inventory -> Pick -> Ship -> AR Invoice -> Receive -> GL

Transfer Order (Internal Sales) -> Costing Mod

Internal Requisition -> Transfer Order -> Pick -> Ship -> Intercompany Invoice Created