

### Sales order Approvals: -

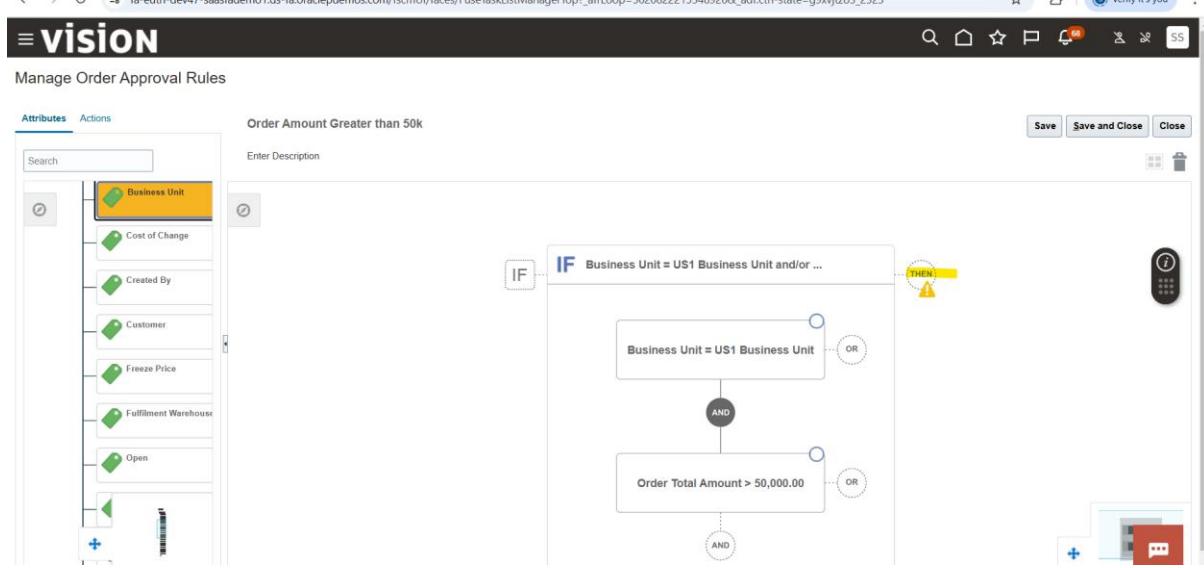
<b>Sales Order Approvals</b>	Manage order approvals standards/discounts
	Activate and check the approvals
	Enable sales order approvals
<b>Pre Transformation Rules (Def Rules)</b>	Manage pre transformation Defaulting Rules for sales order
<b>Post Transformation Rules</b>	Manage Post transformation Defaulting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

### Manage order approvals:

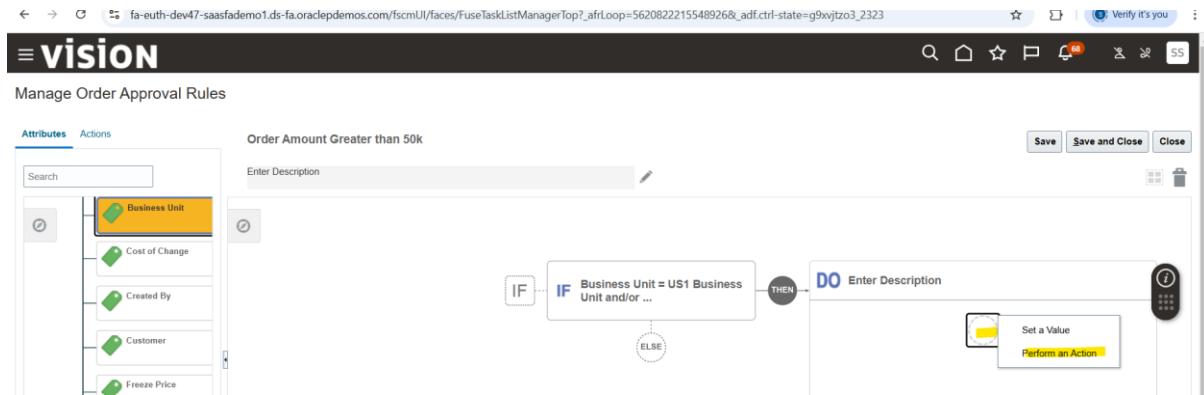
The screenshot shows the Oracle Vision application interface. On the left, there is a sidebar titled 'Functional Areas' with various options like 'Initial Users', 'Enterprise Profile', 'Organization Structures', etc., some of which are marked with a yellow star. The 'Orders' option is selected and highlighted with a yellow box. In the main content area, there is a 'Search Tasks' bar and a list of tasks under the 'Orders' category. One task, 'Manage Order Approval Rules', is also highlighted with a yellow box.

This screenshot shows the 'Manage Order Approval Rules' dialog box. It has tabs for 'Attributes' and 'Actions'. Under 'Attributes', there is a search bar and a list of conditions including 'Business Unit', 'Cost of Change', 'Created By', 'Customer', 'Freeze Price', and 'Fulfillment Warehouse'. The 'Business Unit' condition is selected and highlighted with a yellow box. The 'Actions' tab is active, showing a condition builder. A condition is being created with the text 'Order Amount Greater than 50K'. The 'IF' part of the condition is set to 'Business Unit' with the value 'US1 Business Unit'. The 'THEN' part is currently empty. There are 'Save', 'Save and Close', and 'Close' buttons at the top right of the dialog.

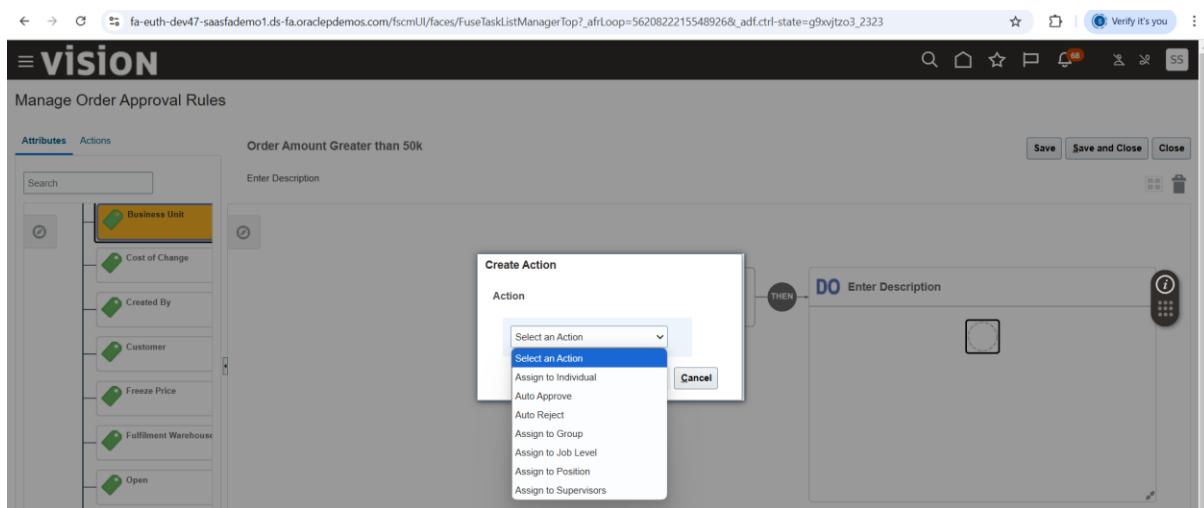
Here we are writing the rules.



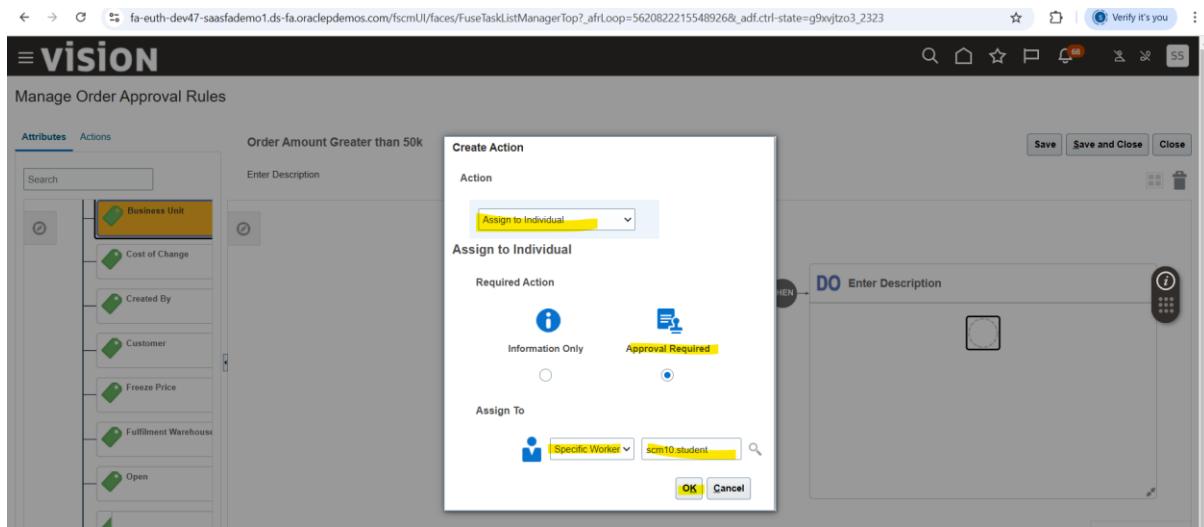
If the sales order is from US1 Business Unit, and amount>50,000, then click on DO



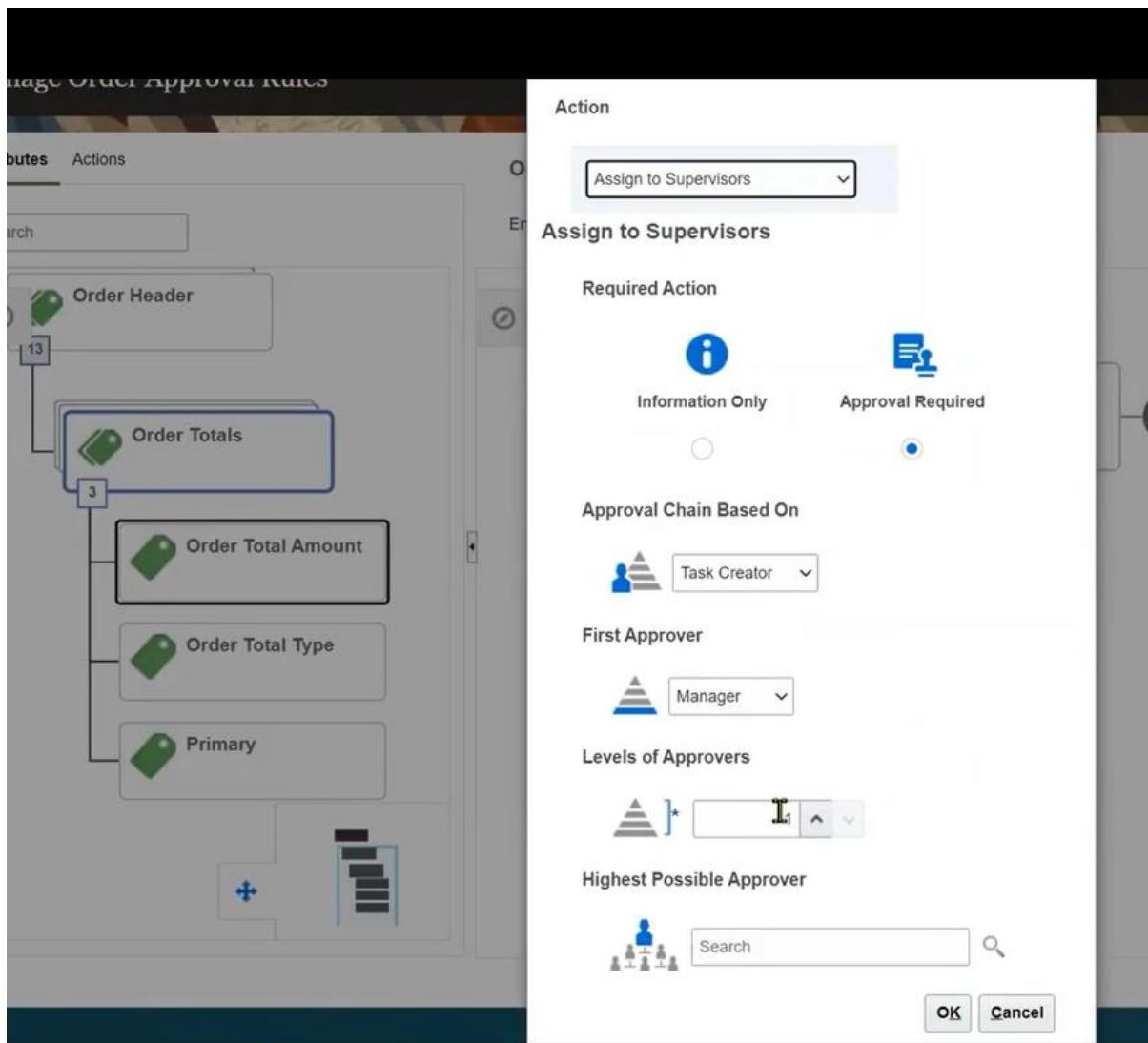
Click on the circle perform an action.



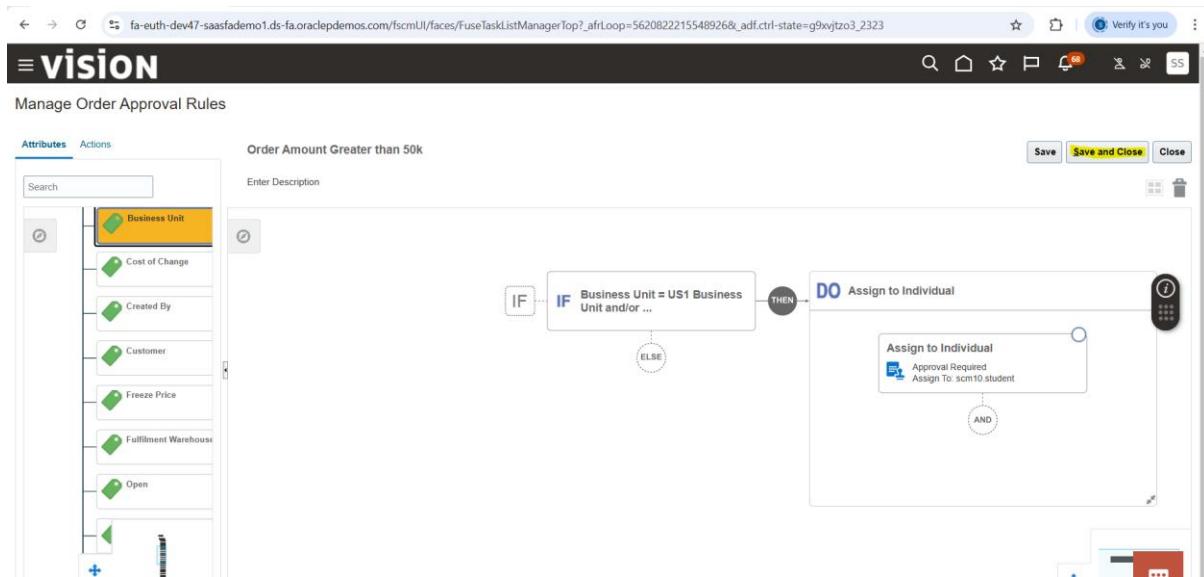
Choose what hierarchy you want for approval



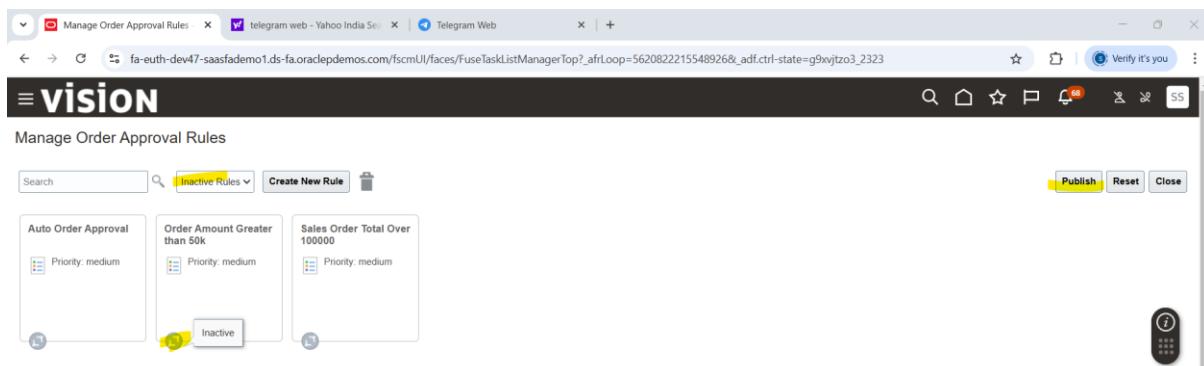
I am assigning to specific worker, like scm10.student.



You can select supervisor or hierarchy as well.



Save and close.



Manage Order Approval Rules

Search Inactive Rules Create New Rule

Auto Order Approval Priority: medium

Order Amount Greater than 50k Priority: medium

Sales Order Total Over 100000 Priority: medium

Order Amount Greater than 50k

Information

\* Name Order Amount Greater than 50k

Description

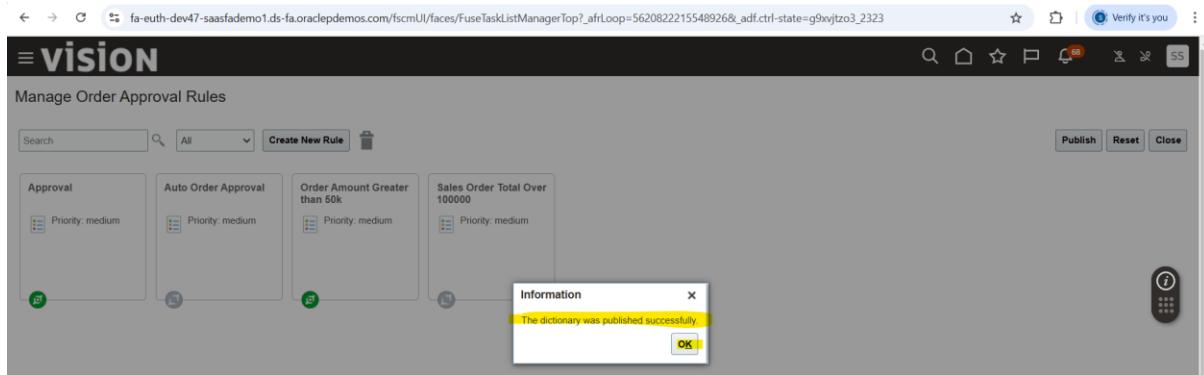
Priority medium

Activate Rule

Effective Dates  Start 1/25/2023 3:33 AM   End

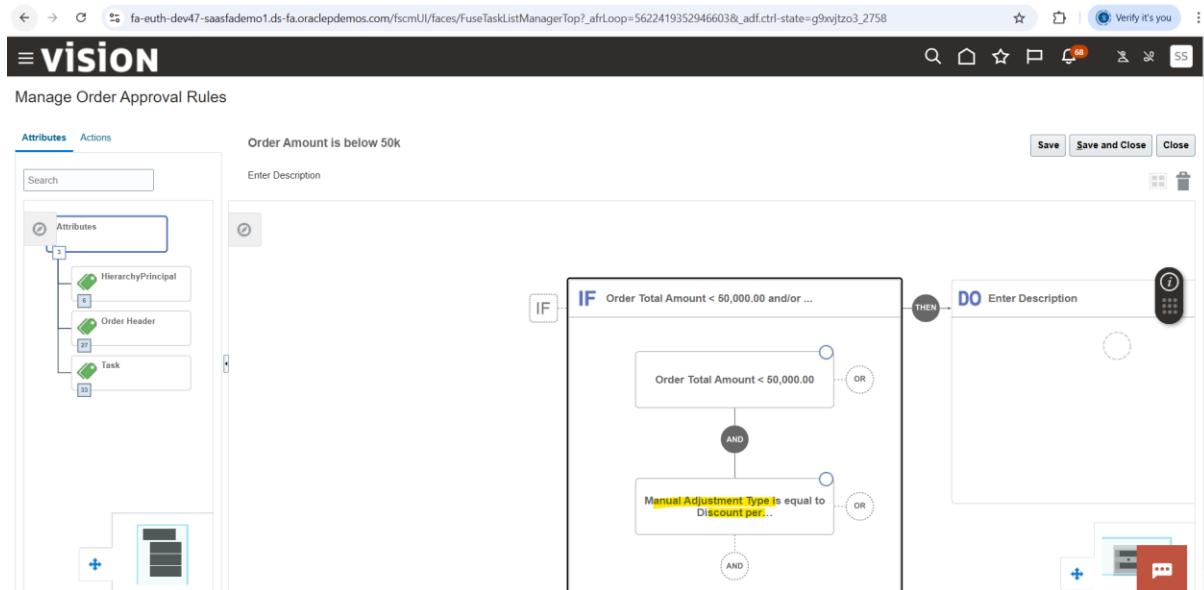
Save and Close

Actions Logs

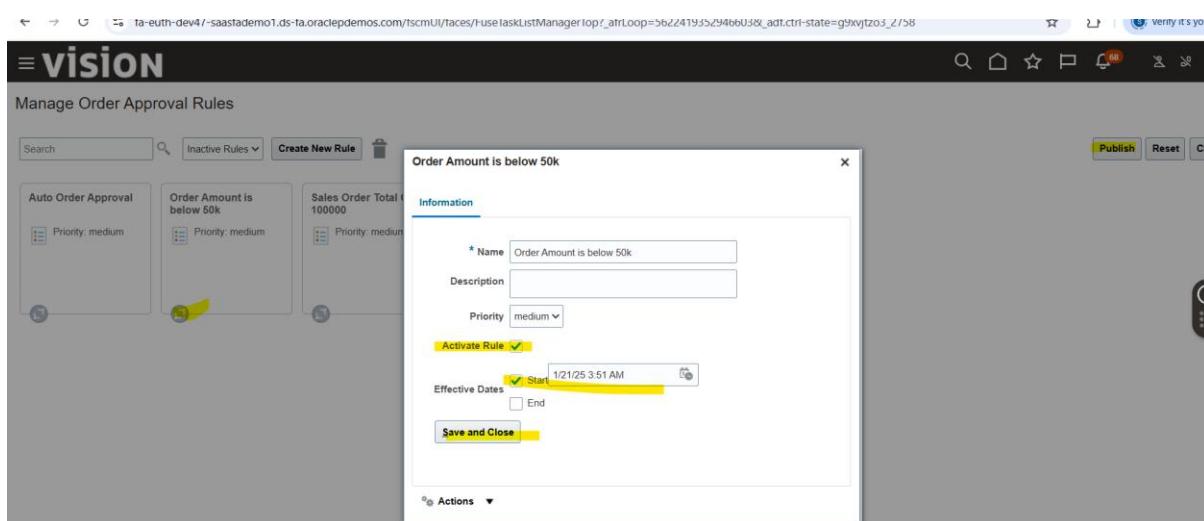


Not only based on BU, we can write approval rules based on order type, customer etc.

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.



The screenshot shows the Oracle Fusion Task List Manager interface. At the top, there is a search bar, a dropdown menu, and several icons. Below the header, the title "VISION" is displayed, followed by "Manage Order Approval Rules". There is a "Create New Rule" button and a trash can icon. A "Search" field with a magnifying glass icon, a dropdown menu set to "All", and a "Create New Rule" button are also present. On the right side, there are "Publish", "Reset", and "Close" buttons. The main area contains five rule cards, each with a green circular status indicator:

- Approval**: Priority: medium
- Auto Order Approval**: Priority: medium
- Order Amount Greater than 50k**: Priority: medium
- Order Amount is below 50k**: Priority: medium
- Sales Order Total Over 100000**: Priority: medium

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

The screenshot shows the Oracle Fusion Task List Manager interface. It displays a list of parameters under the heading "Start Approval Process for Sales Orders". The table has two columns: "Parameter Name" and "Parameter Description". The "Parameter Name" column includes "Start Approval Process for Sales Orders", "Enable Orchestration Process Planning and ...", "Number of Times to Retry Pause", "Pricing in Configurator", and "Configuration Effective Date for Exploding In...". The "Parameter Description" column provides details for each parameter. Below this table, there is a section titled "Start Approval Process for Sales Orders: Values" with a configuration interface. It shows three dropdown menus:

- \* Source Order System: All
- \* Start Approval Process for Sales Orders: No
- Amazon: Yes

The screenshot shows the Oracle Fusion Task List Manager interface. It displays a list of parameters under the heading "Start Approval Process for Sales Orders". The table has two columns: "Parameter Name" and "Parameter Description". The "Parameter Name" column includes "Check for Trade Compliance When User Su...", "Number of Processes for Order Import", "Send Discount Details to Billing Systems", "Start Approval Process for Sales Orders", and "Compare Change Order to Fulfillment Values". The "Parameter Description" column provides details for each parameter. Below this table, there is a section titled "Start Approval Process for Sales Orders: Values" with a configuration interface. It shows three dropdown menus:

- \* Source Order System: All
- \* Start Approval Process for Sales Orders: Yes

Based on the source

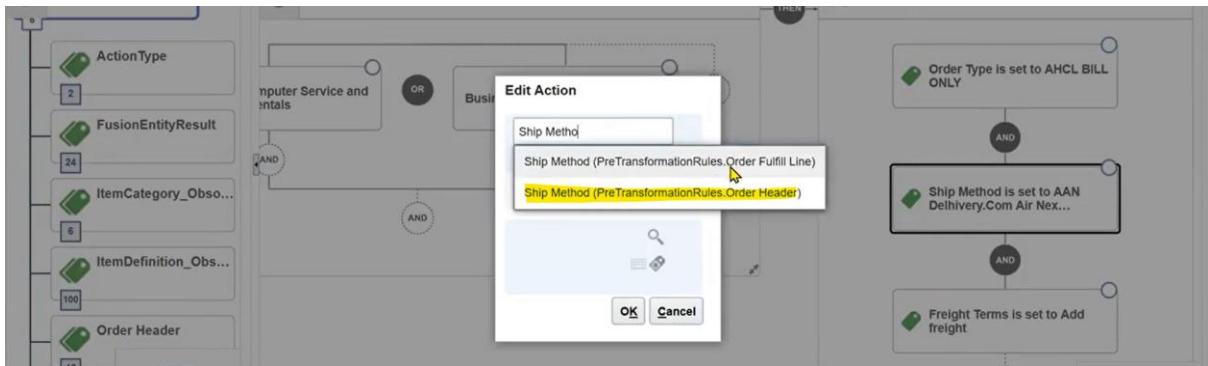
### pre transformation rules for sales orders:-

The screenshot shows the Oracle Fusion Task List Manager interface. On the left, there's a sidebar titled 'Functional Areas' with various categories like 'Initial Users', 'Enterprise Profile', 'Organization Structures', etc. Under 'Orders', there's a sub-section with tasks such as 'Manage Pretransformation Defaulting Rules', 'Manage Product Transformation Rules', etc. The 'Manage Pretransformation Defaulting Rules' task is highlighted with a yellow box.

This screenshot shows the 'Manage Pretransformation Defaulting Rules' configuration screen. It displays a flowchart editor with a condition node labeled 'IF Customer = Computer Service and Rentals' connected to a 'DO Enter Description' node. The condition part of the rule is highlighted with a yellow box.

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

This screenshot shows a more complex rule configuration. It starts with an 'IF Customer = Computer Service and Rentals' condition, which then triggers a 'DO Order Type is set to Subscription Sales and ...' action. This action is followed by a series of AND conditions: 'Order Type is set to Subscription Sales', 'Ship Method is set to DHL Air Next day air', and 'Freight Terms is set to Prepaid freight'. The first condition in this sequence is highlighted with a yellow box.



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

Order Type: Amazon Bill only

Account Receivables

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.

Name	Type	Details
Manage Enterprise HCM Information	Task	

GOTO Manage Enterprise HCM Info,

**Enterprise Information**

Work Start Time: 08:30 Standard Working Hours Frequency: Weekly  
 Work End Time: 17:30 Standard Annual Working Duration:  
 Standard Working Hours: 40.000 Annual Working Duration Units

**Currency Support Information**

Transaction Processing Conversion Rate Type  
 Reporting Conversion Rate Type

**User and Role Provisioning Information**

User Account Creation: Both person and party users  
 User Account Role Provisioning: Both person and party users  
 User Account Maintenance: Both person and party users

We should keep user account creation none.

Actions > update

**Enterprise Information**

Work Start Time: 08:30 Standard Working Hours Frequency: Weekly  
 Work End Time: 17:30 Standard Annual Working Duration:  
 Standard Working Hours: 40.000 Annual Working Duration Units

**Currency Support Information**

Transaction Processing Conversion Rate Type  
 Reporting Conversion Rate Type

**User and Role Provisioning Information**

User Account Creation: None  
 User Account Role Provisioning: Both person and party users  
 User Account Maintenance: Both person and party users

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

**VISION**

### Edit Enterprise: JIO

**Enterprise Description**

*Effective Start Date	1/21/25	Internal Address Line	
*Name	JIO	Location	JIO Head Quarters 3rd floor, Lake Shore Towers, Raj Bhavan Rd MUMBAI-500082
*Status	Active	Address	Maharashtra INDIA
Action Reason		Attachments	None
Effective End Date		Context Value	

**Other Classifications**

Organization Information EFF: Enterprise Details

**Work Day Information**

**Submit it.**

**Search**

Manage Users

Match With Tasks, Task Lists, Business Objects

Name	Type	Details
Manage Users	Task	

**VISION**

### Edit User:ABC Salesperson

**Personal Details**

*Last Name	ABC Salesperson	Hire Date	1/23/25
First Name		Phone	
Middle Names		Work Mobile Phone	
Title		Work Fax	
*Email	csreenivasulu919@gmail.com		

**User Details**

**Employment Information**

*Person Type	Employee	Department	
Legal Employer	US1 Legal Entity	Location	
*Business Unit	US1 Business Unit	Mail Stop	
Job		Manager	
Grade			

**User Details**

**Employment Information**

*Person Type	Employee	Department	
Legal Employer	US1 Legal Entity	Location	
*Business Unit	US1 Business Unit	Mail Stop	
Job		Manager	
Grade			

**Resource Information**

Resource Role	Sales Associate	Department	
Reporting Manager		Location	
Organization		Mail Stop	
		Manager	

**Roles**

Autoprovision Roles

The screenshot shows a form for creating a user. It includes fields for Middle Names, Title, Email, Work Mobile Phone, Work Fax, Person Type (Employee), Legal Employer (USI Legal Entity), Business Unit (US1 Business Unit), Job, Grade, Department, Location, Mail Stop, Manager, Resource Role (Sales Analyst), Reporting Manager, and Organization.

Save and close.

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

The screenshot shows a search results page for 'Manage Resources'. A yellow box highlights the search bar containing 'manage resources'. The results table has columns for Name, Type, and Details, with one entry for 'Task'.

The screenshot shows the 'Manage Resources' search interface. It includes search filters for Resource Name (ABC Salesperson), Registry ID, Usage, Effective As-of Date (1/23/25), E-Mail, and search criteria for User Name, Organization, Team, and Role. The results table shows a single row for 'ABC Salesperson' with details: Registry ID 1057689, Usage HR Employee, and Role Sales Analyst. Buttons for Advanced, Saved Search, and Done are visible.

Edit, it

Add, this sales person to the reference data set.

The screenshot shows the Oracle Fusion Applications Salesperson setup screen. At the top, there is a detailed form for a Salesperson named HR Employee with Registry ID 809625. The form includes fields for Manager, Job Title, Department (Sales US), Organization, Roles (Sales Director), and Mail Stop. Below this is a table titled "Salesperson Information" with columns: Set, Salesperson Number, Sales Credit Type, Sales Tax Geography, Inside City Limits, From Date, and To Date. The "Set" column contains two entries: "US1BUSET" and "ENTERPRISE". The "Salesperson Number" column shows values 4567 and 567 respectively. The "From Date" column shows 1/23/25. The "To Date" column shows "mid/yy". The "Sales Tax Geography" and "Inside City Limits" columns are empty. The "Save" button is highlighted in yellow.

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

The screenshot shows the "Manage Set Assignments: US1 Business Unit" screen. It displays a table with three columns: Reference Data Object, Reference Data Set Code, and Reference Data Set Name. The table lists various business objects and their assignments to the "US1BUSET" reference data set. The "Reference Data Set Code" column shows "US1BUSET" for all rows. The "Reference Data Set Name" column shows "US1 BU Set" for all rows. The "Save" button is highlighted in yellow.

Reference Data Object	Reference Data Set Code	Reference Data Set Name
Apply Hold Reasons	US1BUSET	US1 BU Set
Cancellation Reasons	US1BUSET	US1 BU Set
Channel Adjustment Types	US1BUSET	US1 BU Set
Channel Claim Class Source Map	US1BUSET	US1 BU Set
Channel Claim Types	US1BUSET	US1 BU Set
Claim Reasons	US1BUSET	US1 BU Set
Close Reasons	US1BUSET	US1 BU Set
Collections Setups	US1BUSET	US1 BU Set

Receivables Collectors	US1BUSET	US1 BU Set
Receivables Lockbox	US1BUSET	US1 BU Set
Receivables Memo Lines	US1BUSET	US1 BU Set
Receivables Payment Terms	US1BUSET	US1 BU Set
Receivables Remit To Address	US1BUSET	US1 BU Set
Receivables Revenue Contingencies	US1BUSET	US1 BU Set
Receivables Transaction Source	US1BUSET	US1 BU Set
Receivables Transaction Type	US1BUSET	US1 BU Set
Revenue Management Revenue P...	US1BUSET	US1 BU Set
Revenue Scheduling Rule	US1BUSET	US1 BU Set
Sales Methods	US1BUSET	US1 BU Set
<b>Sales Person</b>	<b>US1BUSET</b>	<b>US1 BU Set</b>
Sales Revenue Category	US1BUSET	US1 BU Set
Sales Revenue Type	US1BUSET	US1 BU Set

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

The screenshot shows the VISION Order Management interface. A modal dialog box titled "Manage Sales Credits" is open. It contains a table with three columns: "Salesperson", "Revenue Percentage", and "Nonrevenue Percentage". There is one entry: "KMC\_Sales Guy" with "Revenue Percentage" set to "2". At the bottom of the dialog are "OK" and "Cancel" buttons. The background shows fields for "Customer", "Contact", "Contact Method", "Ordered Date" (3/27/22 10:33), "Purchase Order", and "Order Type". Below the dialog, there is a sidebar with links like "Sale Person", "Manage Resources", "Line Adjustment Lookups", "Adjustment Reason", "Generic Holds", "Credit Hold", and "Credit Limit".

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

Currency = US Dollar

**Customer:** Computer Service and Rentals (10060)  
**Contact:** Logan Anderson  
**Contact Method:**  
**Ordered Date:** 11/2/16 2:00 PM  
**Purchase Order:**  
**Order Type:**

Item	Status	Duration Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM
1 AS46335 - Vario 5500 Tablet	Closed		1			Ea	Sale Price

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

Currency = US Dollar

**Customer:** Computer Service and Rentals  
**Contact:** Logan Anderson  
**Contact Method:**  
**Ordered Date:** 11/2/16 2:00 PM  
**Purchase Order:**  
**Order Type:**

Item	Duration Period	Status	Sales Agreement	Sales Agreement Line	Sales Agreement Version	Quantity	UOM	On Hand
1 AS46335 - Vario 5500 Tablet		Closed				1	Ea	Sale Price
2 AS00100 - Alliance Business Software		Not Started				1	Ea	In Stock

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

Search

Manage Standard Lookups

Match With Tasks, Task Lists, Business Objects

Name	Type	Details
Manage Standard Lookups	Task	

Lookup code: ORA\_FOM\_ADJUSTMENT\_REASON\_CODE

Manage Standard Lookups

Search

Lookup Type	Meaning	Description	Module	Lookup Configuration Level	REST Access Secured
ORA_FOM_ADJUSTMENT_REASON_C	Adjustment Reason Code	Describes why the user adjusted a sales price	Manage Orders	Extension	Authenticated

ORA\_FOM\_ADJUSTMENT\_REASON\_CODE: Lookup Codes

Lookup Code	Display Sequence	Enabled	Start Date	End Date	Meaning	Description	Tag
ORA_PRICE_MATCH	1	✓	1/1/59		Price match	Price adjusted for price match.	
ORA_ERROR_CORRECTION	2	✓	1/1/59		Error correction	Price adjusted for error correction.	
ORA_SALES_NEGOTIATION	3	✓	1/1/59		Sales negotiation	Price adjusted for sales negotiation.	
ORA_OTHER	4	✓	1/1/59		Other	Price adjusted for other reason.	
DS_INCENTIVE		✓	1/1/20	m/d/y	Incentive	Price adjusted for Incentive	

Lookup codes start with ORA are seeded ones.

Search Results

Lookup Type	Meaning	Description	Module	Lookup Configuration Level	REST Access Secured
ORA_FOM_ADJUSTMENT_REASON_CODE	Adjustment Reason Code	Describes why the user adjusted a sales price	Manage Orders	Extension	Authenticated

ORA\_FOM\_ADJUSTMENT\_REASON\_CODE: Lookup Codes

Lookup Code	Display Sequence	Enabled	Start Date	End Date	Meaning	Description	Tag
Year end Sale	2	✓	1/22/25	m/d/y	Year end Sale	Year end Sale	
Black Friday Sale	2	✓	1/22/25	m/d/y	Black Friday sale	Black Friday sale	Black Friday sale
ORA_PRICE_MATCH	1	✓	1/1/59		Price match	Price adjusted for price match.	
ORA_ERROR_CORRECTION	2	✓	1/1/59		Error correction	Price adjusted for error correction.	

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.

The screenshot shows a sales order header for 'Computer Service and Rentals - 83265 (1) - Processing'. A context menu is open over the header area, with 'Holds' highlighted. Other options in the menu include Copy, View Currency Details, View Pricing Strategy and Segment, Switch to Fulfillment View, View Additional Information, and Create Document. Below the header, there's a table for 'Order Lines' showing one item: 'AS46335 - Vario 5500 Tablet' with a quantity of 1. The status is 'Closed'.

We can apply and release the holds manually.

The screenshot shows a sales order header for 'Computer Service and Rentals - 83265 (1) - Processing'. A context menu is open over the header area, with 'Holds' highlighted. Other options in the menu include Copy, View Currency Details, View Pricing Strategy and Segment, Switch to Fulfillment View, View Additional Information, and Create Document. Below the header, there's a table for 'Order Lines' showing one item: 'AS46335 - Vario 5500 Tablet' with a quantity of 1. The status is 'Closed'.

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

The screenshot shows a sales order header for 'Computer Service and Rentals - 83265 (1) - Processing'. A context menu is open over the header area, with 'Holds' highlighted. Other options in the menu include Copy, View Currency Details, View Pricing Strategy and Segment, Switch to Fulfillment View, View Additional Information, and Create Document. Below the header, there's a table for 'Order Lines' showing one item: 'AS46335 - Vario 5500 Tablet' with a quantity of 1. The status is 'Created'.

## Credit holds can be released from the fulfillment lines

The screenshot shows the Oracle SCM Order System interface. The main window displays a grid of fulfillment lines. A context menu is open over a specific row, with the 'Holds' option selected. A submenu under 'Holds' shows several options: 'View Hold Details', 'Apply Hold', and 'Release Holds'. The 'Release Holds' option is highlighted with a cursor.

**Release Holds**

Holds on Selected Fulfillment Lines

Remove or filter out holds that you do not want to release.

Fulfillment Line	Customer	Hold Name	Hold Date	Hold Applied By
1-1	Computer Service and R...	Credit Check Hold	3/20/22 11:58 AM	Computer Service and R...

Release All Holds

\* Release Reason: Credit review approved with

Comments:

Save and Close Cancel

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.

Customer: Computer Service and Rentals (10060)

Contact: Logan Anderson

Contact Method:

Ordered Date: 11/2/16 2:00 PM

Purchase Order

Order Type: Subscription Sales

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

**Order Lines**

Item	Status	Duration	Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM
1 AS46335 - Vario 5500 Tablet	Closed			1				Ea
2 AS00100 - Alliance Business Software	Not Started			1				Ea

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

Order: Computer Service and Rentals - 83265 (2) - Approval Pending

Approval Information

Options ▾

Section	Stage or Participant
1	Order Approval Stage scm10 student - Order Approval Stage Assigned Jan 22, 2025
1.1	scm10 student

Order Approval Stage

```

graph TD
    Start([Start]) --> Stage[Order Approval Stage]
    Stage --> User[scm10 student]
    User --> End([End])
  
```

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

Order: Computer Service and Rentals - 83265 (2) - Approval Pending

Notifications

Search

ACTION REQUIRED  
Approval Request for Order 83265  
scm10 student **Approve** Reject 5 minutes ago

ACTION REQUIRED  
Approval Request for Order 98442  
scm10 student **Approve** Reject 4 hours ago

FYI  
Document (Purchase Order) US165059 (Requisition 204173) Implemented  
Calvin Roth Dismiss 7 hours ago

FYI  
Document (Purchase Order) US165058 (Requisition 204173) Implemented  
Calvin Roth Dismiss 7 hours ago

Manage hold codes: -

Most Visited My Oracle Support

VISION

Search

Manage Hold Codes

Match With Tasks, Task Lists, Business Objects

Name	Type	Details
Job Role to Manage Hold Codes	Business Object	Task Count: 1
<a href="#">Manage Hold Codes</a>	Task	

Manage Hold Definitions								
Actions ▾ View ▾ Format ▾ <input type="button" value="Save"/> <input type="button" value="Save and Close"/> <input type="button" value="Cancel"/>								
* Code	* Name	Description	* Start Date	End Date	Hold All Services	Predefined	In Use	* Set
HOLD_FOR_CHANGE_REQUEST	Hold For Change Request	System defined hold code used in ...	4/1/09		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	—	COMMON
HOLD_BY_CUSTOMER	Hold Requested by Customer	Hold Requested by Customer	12/17/13		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	COMMON
HOLD_FOR_EXPORT_COMPLIA...	Hold for Export Compliance	Hold Requested by Customer Servi	1/14/16	<input type="button" value="m/d/yy"/>	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
HOLD_FOR_CREDIT_CHECK	Hold for Credit Check	Hold Requested by Customer Servi	1/14/16	<input type="button" value="m/d/yy"/>	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
HOLD_FOR SHIPPING_INSTRU...	Hold for Shipping Instructions	Hold Requested by Customer	1/14/16	<input type="button" value="m/d/yy"/>	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
HOLD_FOR_ADMINISTRATION	Hold for Administration	Hold Requested by Customer Servi	1/14/16	<input type="button" value="m/d/yy"/>	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON

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

Click on +, to create a new hold reason

* Name	Description	* Start Date	End Date	Hold All Services	Predefined	In Use	* Set
Covid_LockDown	Covid_LockDown	3/28/22	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	—	—	COMMON
Hold Requested by Customer	Hold Requested by Customer	12/17/13		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COMMON
Hold for Export Compliance	Hold Requested by Customer Servi	1/14/16	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
Hold for Credit Check	Hold Requested by Customer Servi	1/14/16	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
Hold for Shipping Instructions	Hold Requested by Customer	1/14/16	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
Hold for Administration	Hold Requested by Customer Servi	1/14/16	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON

* Name	Description	* Start Date	End Date	Hold All Services	Predefined	In Use	* Set
Covid_LockDown	Covid_LockDown	3/28/22	<input type="button" value="m/d/yy"/>	<input type="checkbox"/>	—	—	COMMON
Hold Requested by Customer	Hold Requested by Customer			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COMMON
Hold for Export Compliance	Hold Requested by Customer Servi			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
Hold for Credit Check	Hold Requested by Customer Servi			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
Hold for Shipping Instructions	Hold Requested by Customer			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON
Hold for Administration	Hold Requested by Customer Servi			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	COMMON

Columns Hidden 1


**Services** Applicable Roles

Actions ▾ View ▾ Format ▾

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

Select and Add: Services

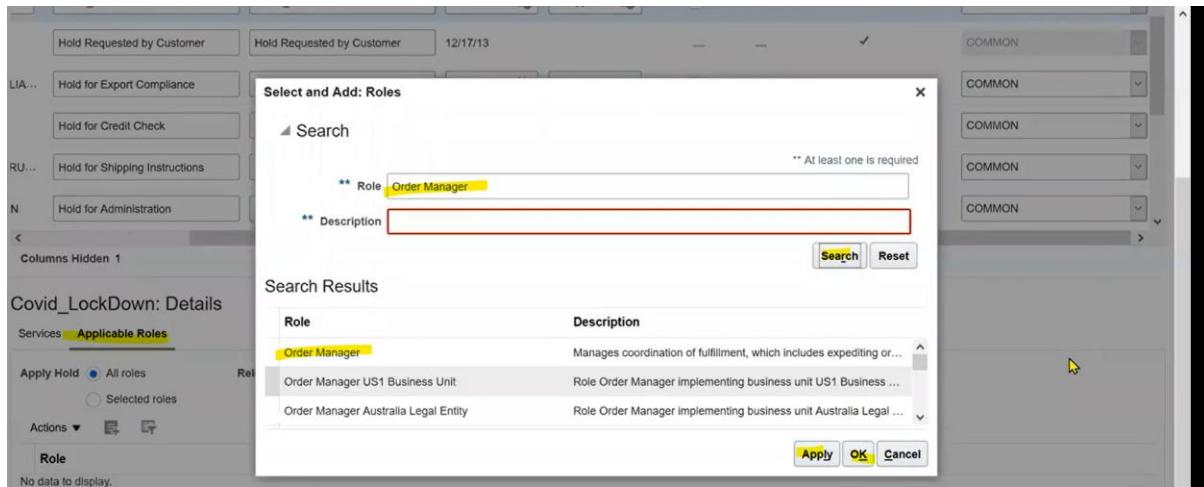
Search

Saved Search

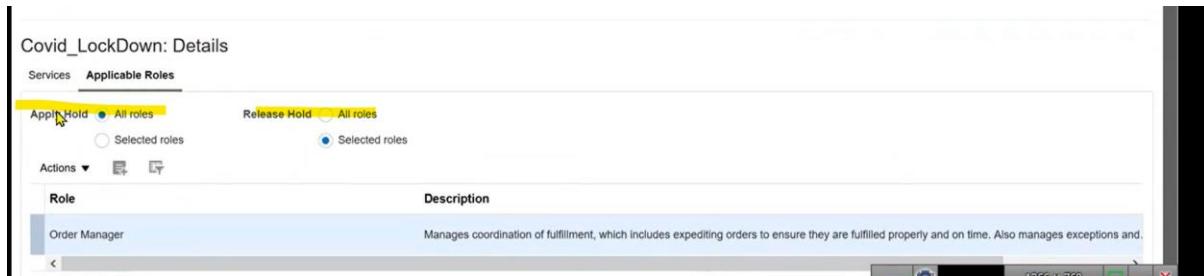
Code:   
Name:   
Task Type:

Code	Name	Task Type
DOO_Create_Shipping	Create Shipping	Shipment

Rows Selected 1



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 from pricelist.

We can provide the price breaks/discounts as well.

Currency = US Dollar

Last Saved 1/22/25 5:34 PM

Customer	Computer Service and Rentals
Contact	Evelyn Duncan
Contact Method	
* Ordered Date	1/22/25 5:29 PM
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 Agreement	
Sales Credits	

### Shipment Details

General Shipping Supply

Ship-to Contact	Evelyn Duncan
Ship-to Contact Method	
Request Type	Ship on
* Requested Date	1/22/25 5:29 PM
Shipping Method	DHL Air Next day air
Ship Lines Together	No

Currency = US Dollar

Last Saved 1/22/25 5:34 PM

Customer	Computer Service and Rentals
Contact	Evelyn Duncan
Contact Method	
* Ordered Date	1/22/25 5:29 PM
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 Agreement	
Sales Credits	

### Shipment Details

General Shipping Supply

Latest Acceptable Date	m/d/y h:mm a
Earliest Acceptable Date	m/d/y h:mm a
FOB	Origin
Freight Terms	Prepaid freight
Allow Partial Shipments of Lines	Yes
Shipment Priority	Low
Shipping Instructions	
Packing Instructions	

FOB, Freight Terms, Shipping Priority will be chosen.

Shipping method selected here.

Create Order: Computer Service and Rentals - 98446 - Draft

Total: 437.00 Actions Save Submit Cancel

Currency = US Dollar

Last Saved 1/22/25 5:34 PM

Customer	Computer Service and Rentals
Contact	Evelyn Duncan
Contact Method	
* Ordered Date	1/22/25 5:29 PM
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 Agreement	
Sales Credits	

Shipment Details

General Shipping Supply

Latest Acceptable Date	m/d/y h:mm a
Earliest Acceptable Date	m/d/y h:mm a
FOB	Origin
Freight Terms	Prepaid freight
Allow Partial Shipments of Lines	Yes
Shipment Priority	Low
Shipping Instructions	
Packing Instructions	

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

fa-euth-dev47-saasfademo1.ds-fa.oraclepdemos.com/fscmUI/faces/FuseWelcome?\_adf.ctrl-state=19liqu3oas\_5&fnd=%3B%3B%3B%3Bfalse%3B256%3B%3B&\_afrLoop=5879... ☆ Save Submit Cancel

Create Order: Computer Service and Rentals - 98446 - Draft ⑦

Currency = US Dollar

**Billing and Payment Details ⑦**

Bill-to Address: 301 E Summit Hill Dr,KNOXVILLE, TN 37915 Knox  
Bill-to Contact: Evelyn Duncan  
Bill-to Contact Method:  
Payment Terms: Net 15

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:  
Sales Credits

Last Saved 1/22/25 5:34 PM

payment terms are default from the customer.

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Create Order: Computer Service and Rentals - 98446 - Draft ⑦

Currency = US Dollar

**Billing and Payment Details ⑦**

Bill-to Address: 301 E Summit Hill Dr,KNOXVILLE, TN 37915 Knox  
Bill-to Contact: Evelyn Duncan  
Bill-to Contact Method:  
Payment Terms: Net 15

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:  
Sales Credits

Last Saved 1/22/25 5:43 PM

**Confirmation**  
Sales order 98446 was submitted.  
Create Another Order OK

Sales order number: 98446 .

fa-euth-dev47-saasfademo1.ds-fa.oraclepdemos.com/fscmUI/faces/FuseWelcome?\_adf.ctrl-state=19liqu3oas\_5&fnd=%3B%3B%3B%3Bfalse%3B256%3B%3B&\_afrLoop=5879... ☆ Save Submit Done

Create Order: Computer Service and Rentals - 98446 - Approval Pending ⑦

Currency = US Dollar

**Billing and Payment Details ⑦**

Customer: Computer Service and Rentals (10060)  
Contact: Evelyn Duncan  
Contact Method:  
Ordered Date: 1/22/25 5:29 PM  
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

Total: 437.00 Actions View Approval Information Refresh Done

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

Click on view approval information.

Order: Computer Service and Rentals - 98446 - Approval Pending

Approval Information

Section	Stage or Participant
1	scm10 student - Order Approval Stage Assigned: Jan 22, 2025 scm10 student

```

graph TD
    OA[Order Approval Stage] --> OA[Order Approval Stage]
    OA --> S[scm10 student]
  
```

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

Order: Computer Service and Rentals - 98446 - Approval Pending

Currency = US Dollar

Customer: Computer Service and Rentals (10060)  
Contact: Evelyn Duncan  
Contact Method:  
Ordered Date: 1/22/25 5:29 PM

Notifications

- ACTION REQUIRED Approval Request for Order 98446  
scm10 student Approve Reject 3 minutes ago
- ACTION REQUIRED Create Job (Trainer, Tr 1951-01-01): Process Was Saved  
scm10 student 4 minutes ago

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

Order: Computer Service and Rentals - 98446 - Processing

Total: 437.00 Actions ▾ Refresh Done

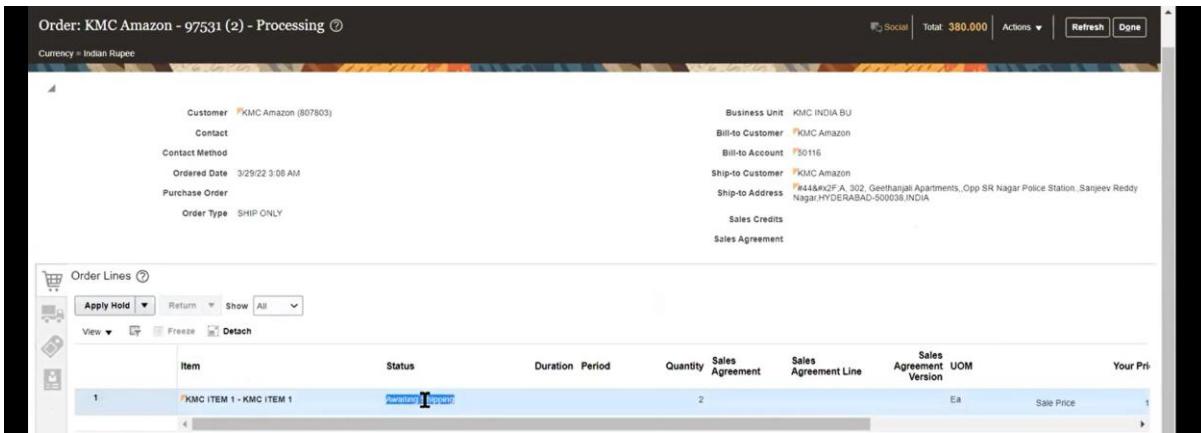
Currency = US Dollar

Customer: Computer Service and Rentals (10060)  
Contact: Evelyn Duncan  
Contact Method:  
Ordered Date: 1/22/25 5:29 PM  
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

Order Lines

Item	Status	Duration Period	Quantity	Sales Agreement	Sales Agreement Line	Sales Agreement Version	UOM
1 AS00100 - Alliance Business Software	Not Started		2				Ea



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:

Sl NO	Module	Question	Answers	Basic	Inte
1	Sales order	What is sales order?	A contractual document between sales organization and consumer for supplying material.		
2		What is Standard sales order?	It is sales order in which product supplier ship the material and bill to the customer is known as standard sales order.		
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>posting		
9		What is drop ship sales order?	The sales organization wont deliver the product directly to the customer, sales organization place the order to organization and organization place purchase order to supplier.		
10		What is back to back order?	Customer place the order to organization and organization place purchase order to supplier.		
11		What is back order sales order?	When there is not enough quantity on hand to fulfill the sales order then order goes to back order.		
12		What is Transfer order?	Transfer order is internal sales order to fulfill internal requisition with document support.		
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 billing > 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 discount.		
16		What is significance of orchestration?	It is used to identify next step in sales order.		