Oracle

SCM Cloud

Using Order Management

Release 12

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Oracle® SCM Cloud Using Order Management

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Contents

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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

▶ **Watch:** This video tutorial shows you how to find help and use help features.

Additional Resources

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1 **Overview**

Managing Sales Orders: Overview

A customer service representative, order manager, or order administrator can use the Overview page of the Order Management work area to create new sales orders, and to get information about sales orders and the fulfillment systems that your organization uses to fulfill them.

You can do the following work in the Order Management work area:

- Create a new sales order.

- Monitor order status and fulfillment line exceptions.

- View sales orders and the orchestration processes that fulfill them.

- Use Gantt charts, visual alerts, and statuses to identify tasks that are in jeopardy.

- Check item availability, including options and their costs and delivery dates.

- Take corrective action, such as substituting an item or splitting fulfillment lines so that you can supply an item from multiple warehouses.

- Manually schedule fulfillment lines.

- Manage holds.

- Manage messages.

- Recover from errors.

How Order Management Fulfills Your Sales Orders

Your order administrator sets up Order Management and other Oracle applications, such as Oracle Inventory Management, to optimize order fulfillment for your organization. This topic describes a generic order fulfillment implementation. Ask your order administrator for details about how order fulfillment works at your organization.

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The following diagram illustrates how Order Management fulfills a sales order.
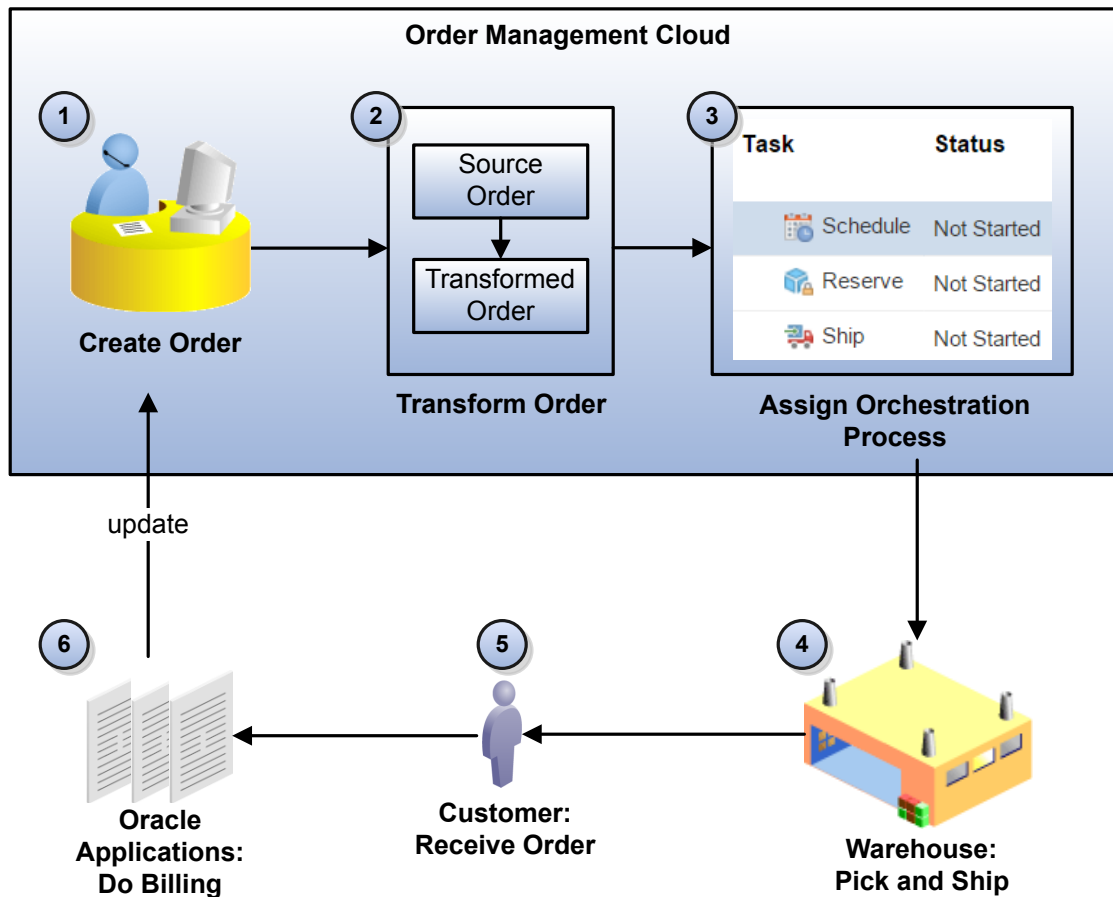
Explanation of Callouts

Order Management does the following work when it fulfills a sales order:

1. You create a new sales order on the Create Order page. You specify the customer in the heading area of this page, you use the Order Lines area to add order lines to the sales order, and then click Submit.

   Some organizations might also import source orders from an order management system into Order Management. For details, see Transforming Source Orders to Sales Orders: How It Works.

2. Order Management transforms each order line into a fulfillment line. For details, see Transforming Order Lines to Fulfillment Lines: How it Works.

3. Order Management creates an orchestration process that fulfills each of the fulfillment lines. The orchestration process references tasks that do fulfillment, such as schedule, reserve inventory, and ship. You can use it to monitor fulfillment status. To schedule fulfillment for the sales order, each orchestration process uses the supplier configuration that your order administrator set up, such as which warehouse will supply the item. For details, see Monitoring Order Fulfillment: Procedure.

4. Order Management sends the sales order to Oracle Fusion Inventory Management, which reserves inventory, picks the item from warehouse shelves, and then ships it to the customer. Inventory Management communicates shipment progress to Order Management during order fulfillment, and Order Management displays these updated statuses in the Order Management work area so that you can monitor fulfillment progress.

5. The customer confirms that they received the item.

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6. Order Management uses the billing configuration that your order administrator set up, such as the payment terms for this customer, to bill the customer for this sales order, and then billing collects the payment. You can also specify billing details in the Billing and Payment Details area of the Create Order page.

   Order Management continuously updates the order status and displays it throughout the Order Management work area during order fulfillment.

Related Topics

- Monitoring Order Fulfillment: Procedure

- Creating Sales Orders: Procedure

Transforming Source Orders to Sales Orders: How It Works

Order Management Cloud transforms each source order that you create in Order Management or that it receives from a source system so that it can optimize order fulfillment.

The following diagram illustrates how Order Management transforms a source order.
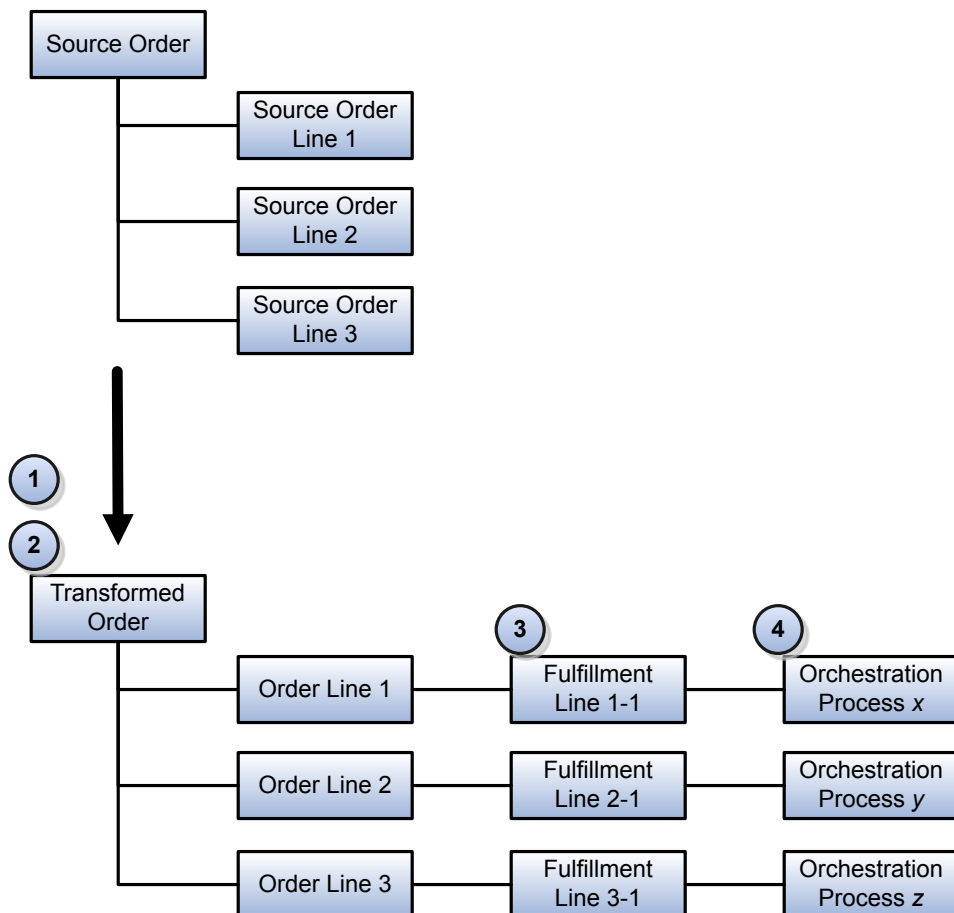
Explanation of Callouts

In this example, Order Management does the following work:

1. Receives a source order that you submit in Order Management or that it gets from a source system. The source order in this example includes three order lines.
2. Separates the source order into logical pieces that it can fulfill, such as fulfillment lines.
3. Assigns each fulfillment line to a new orchestration process that it creates to orchestrate fulfillment for this fulfillment line. For example, it might assign fulfillment line 1-1 to orchestration process 300100090333189, and fulfillment line 1-2 to orchestration process 300100090333210.
4. Starts each orchestration process that performs the tasks that fulfill each fulfillment line. To examine these orchestration processes, you can use the Switch to Fulfillment View action on the Order page of the Order Management work area.

Order Management typically finishes transformation within a few seconds after you click Submit.

Order Management sets the completion date of the final step in each orchestration process to the requested date of the source order. Note that the Last Fulfillment Completion Step specifies the final step of the orchestration process. This final step is not necessarily the last step that Order Management completes in chronological order.

Parts of Sales Orders You Can Use After Order Management Transforms Source Orders

You can use the following parts of a sales order after Order Management transforms a source order. You can use them to monitor and manage order fulfillment.

Part of Sales Order	Description
Order	Includes order lines and fulfillment lines. Note the following: • The relationship that exists between a sales order and a fulfillment line is similar to the relationship that exists between a source order and a source order line. • A sales order that resides in Order Management might not exactly mirror the structure of a source order that resides in an external source system.
Order line	Typically references one fulfillment line. Note the following: • If Order Management splits a fulfillment line, then it maps two or more fulfillment lines to the same order line. • The relationship that exists between a sales order and the order lines preserves some of the original structure of the source order, making it easier to keep track of the original intent of the source order, even if Order Management splits the fulfillment lines that it associates with the sales order.
Fulfillment line	Part of a sales order that you can modify in the Order Management work area. For example, you can do the following modifications: • Schedule or unschedule a fulfillment line. • Reserve items for a fulfillment line. • Substitute an item on a fulfillment line. • Change the warehouse, shipping method, or demand class for a fulfillment line.

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Part of Sales Order	Description
Orchestration process	An order administrator can set up an orchestration process to determine the tasks that this process must perform. You cannot modify an orchestration process in the Order Management work area, but you can monitor an instance of it while it manages each fulfillment line. You can monitor each fulfillment line as it progresses through the orchestration process.
Return fulfillment line	Represents a sales order line that Order Management uses to return items. It is similar to a fulfillment line, but it includes a set of attributes that are specific to returning items.

Related Topics

- Creating Sales Orders: Procedure

Transforming Order Lines to Fulfillment Lines: How it Works

Order Management Cloud transforms the order lines of a sales order that you create into fulfillment lines. These order lines and fulfillment lines might not always mirror each other. The number of fulfillment lines might exceed the number of order lines, or Order Management might use different sequences when it display these lines. It can also transform a source order that it receives from an external source system.

These differences occur because Order Management applies fulfillment requirements to fulfillment lines, such as available inventory, scheduling requirements, or shipping requirements. For example, assume your company receives orders for a laptop computer that comes with multiple accessories, such as a docking station, mouse, and so on. In the following illustration, Order Management transforms order lines to fulfillment lines when it receives a source order from a source system. It transforms a source order for a laptop and accessory package into a sales order that includes individual fulfillment lines for the laptop and for each item that the accessory package contains. It does a similar transformation when you enter a

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sales order directly in Order Management. The transformation that Order Management performs depends on how your order administrator configures Order Management. You can use the Manage Fulfillment Lines page to manage these lines.

Source Order

Line	Quantity	Product	Price
1	1	Laptop	700 USD
1	1	Accessory Package	225 USD

Transformation

Sales Order

Product	Transformed Order Line	Fulfillment Line	Quantity
Laptop	1	1-1	1
Accessory Package	2	2-1	1
Docking Station	2.1	2.1-1	1
Mouse	2.2	2.1-2	1
AC Adapter	2.3	2.1-3	1
Keyboard	2.4	2.1-4	1

Order Management does the following work to transform the source order for this example:

- Transforms two source order lines into six fulfillment lines.

- Uses the price from the source order to populate the price in the sales order.

- Transforms the line for the laptop in the source order to fulfillment line 1 in the sales order.

- Transforms the Accessory Package in the source order to multiple fulfillment lines in the sales order. Each line represents part of the content of the Accessory Package, such as docking station, mouse, AC adapter, and so on.

Related Topics

- Creating Sales Orders: Procedure

Processing Change Orders: How it Works

Order Management Cloud can incorporate a change order that it receives from a variety of sources, such as a source system, a fulfillment system, or the Order Management work area.

Order Management does the following work when it incorporates a change order:

1. Receives a change order from the Order Management work area, a source system, or a fulfillment system.
2. Uses processing constraints to determine whether or not to allow the change. If it allows the change, then Order Management accepts it, and then determines whether or not to adjust the orchestration process to accommodate the change.
3. Identifies the orchestration process steps that have finished and the steps that it must adjust.
4. Sets the status of the tasks that finished before the change occurs, and sets the status for the orchestration process to Change Pending.
5. The fulfillment system accepts the request, and Order Management sets the status of each task to a normal status, such as Completed, when each task that makes the adjustments finishes running.
6. Creates an event when order compensation finishes or when an error occurs during order compensation.

A Gantt chart in the Order Management work area might display the status of a task as canceled. This situation occurs because Order Management might cancel a task, and then run it again, but you happened to view the task while it was in the canceled state.

Related Topics

- Processing Changes That Occur During Order Fulfillment: How It Works

- Revising Sales Orders That You Already Submitted: Procedure

- Creating Sales Orders: Procedure

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2 Managing Sales Orders

Creating and Managing Sales Orders

Logging Into Order Management Cloud: Procedure

You must log into Order Management Cloud before you can create or manage sales orders.

Log into Order Management Cloud:

1. Get the following information that you require to log into Order Management Cloud:

   o URL that provides access to Order Management Cloud.

   o User account and password that allows you to access pages in Order Management Cloud. Your user account must reference a role that has the privileges you require to manage sales orders. It is recommended you use the ORDER_ENTRY_SPEC role.

   For details, ask your order administrator.

2. Use a Web browser, such as Internet Explorer, to navigate to the URL that your order administrator provided in step 1.

3. On the Order Management login page, enter your user name and password, and then press the Enter key.

   Order Management displays the Overview page. You can use this page to create new sales orders and manage existing ones.

Related Topics

- Managing Sales Orders: Overview

Creating Sales Orders: Procedure

You can use the Create Order page of the Order Management work area to create a new sales order.

For the example in this topic, assume you must create a sales order for customer Computer Service and Rentals, and for item Desktop Chassis Model A243. This topic includes example values. You might use different values, depending on your business requirements.

Create a sales order:

1. In the Navigator, click Order Management.
2. On the Overview page, click Tasks, and then click Create Order.
3. On the Create Order page, complete the order header:

   o Enter a value in the Customer field, such as Computer Service and Rentals. Order Management makes other order head fields available after you enter the value. If you cannot locate the customer, then your order administrator must add the customer to Order Management. For details, ask your order administrator.

   o Optional. Specify sales credits. For details, see Managing Sales Credits: Explained.

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    ○ Specify values in other fields, as necessary. Order Management applies any values that you specify in the order header to the entire sales order.

4. In the Order Lines area, in the Select Item field, enter text or a number that identifies the item that your customer is ordering, press TAB on your keyboard, wait for Order Management to display the item details, and then click Add.

    For example, enter Desktop Chassis Model A243.

    If you cannot locate the item, then your order administrator must add it to Order Management. For details, ask your order administrator.

> 💡 **Tip:** To perform an advanced search, click the magnifying glass. In the Search and Select dialog, click Advanced, expand Advanced Search, and then enter a value in a field. For example, in the Item field, enter Computer, and then click Search. Order Management will display all the items that begin with the word Computer.

5. Repeat step 4, but add a different item. For example, enter Monitor - 19".
6. Optional. Validate your sales order. For details, see Validating Sales Orders: Procedure.
7. Click Submit.
8. In the Warning dialog, click Yes.
9. Notice that Order Management added information at the top of the order header, such as **Order: Computer Service and Rentals - 422080 - Processing**, where:

    ○ **Computer Service and Rentals** is the customer name.

    ○ **422080** is the order number.

    ○ **Processing** is the order status.

Order Management transformed your sales order and scheduled it for fulfillment. For details, see Transforming Source Orders to Sales Orders: How it Works.

Related Topics

- Transforming Source Orders to Sales Orders: How It Works

- Managing Sales Orders: Overview

Managing Sales Credits for Sales Orders: Explained

You can use the Sales Credits attribute in the order header of the Create Order page to assign the revenue percentage and nonrevenue percentage of the sales credit that each salesperson receives who is involved with the sales order. Order Management Cloud distributes the credit according to how you specify these percentages.

A sales credit is a percentage of the total revenue of a sales order that a salesperson receives as commission for the order. Your company can use sales credits to report on salesperson performance, report on achieving quota, to assist with calculating compensation, and to assist with forecasting according to territory. You can use the Manage Sales Credits dialog to set the following percentages.

Sales Credit Assignment	Description
Revenue Percentage	Specify the percentage of the total revenue that the salesperson receives as commission for work they performed that is directly related to selling this sales order.

Sales Credit Assignment	Description
	You must distribute exactly 100% of the total revenue of the sales order. For example, assume the revenue for a sales order is $100 and you add two salespeople in the Manage Sales Credits dialog. If you set the revenue percentage for one salesperson to 60, then you must set the revenue percentage for the other salesperson to 40. If you add only one salesperson, then you must set the revenue percentage for this salesperson to 100.
Nonrevenue Percentage	Specify the percentage of the total revenue that the salesperson receives as commission for work they performed that is not directly related to selling this sales order. For example, for revenue from a sales bonus. You can specify a distribution of the percentage that is equal to any fraction of the total revenue of the sales order.

Your order administrator defines each salesperson in Trading Community Architecture as an internal resource who is a member of a sales organization. Order Management then displays the salespeople who are related to the business unit in the Manage Sales Credits dialog. Consult your company policies to determine the salespeople you must add and the percentages to enter.

Order Management sends the sales credit information that you specify to Oracle Fusion Receivables, which then sends this information to Oracle Fusion Incentive Compensation so that it can pay the commission. For details about sales credits, revenue percentage, and nonrevenue percentage, ask your order administrator.

Related Topics

- Managing Sales Orders: Overview

Validating Sales Orders: Procedure

Order Management Cloud automatically validates your sales order when you click Submit, but you can also manually validate it before you click Submit. Validation examines your sales order for a variety of possible errors, such as errors that are related to constraints, pricing, configuration, or tax processing. It also makes sure you include a value for each required attribute.

Validate a sales order:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Create Order**.
3. On the Create Order page, complete the sales order, click **Actions**, and then click **Validate**.
4. In the Warning dialog, click **Yes**.
5. If the validation finishes:

   o **Without error.** In the Confirmation dialog, click **OK**. You can submit your sales order.

   o **With error.** Fix each error that the Error dialog displays, and then click **Validate** again.

   Order Management Cloud adds an error or warning icon to the order header immediately to the left of the Total attribute, and to each order line that contains an error. It also keeps the sales order in Draft status. You can click the warning icon to get details about the error.

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Revising Sales Orders That You Already Submitted: Procedure

If you must revise a sales order that you already submitted, then you can create a new version of it, and then edit this new version.

A number of processing constraints determine whether or not Order Management Cloud allows you to revise a sales order that you submitted. For example, if Order Management has already started order fulfillment for the sales order, then you might need to cancel the sales order, and then create a new one. For details, see Canceling Sales Orders: Procedure.

Create a new version of a sales order:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Advanced**.

   As an alternative, if you know the sales order number, then you can search for it on the Overview page.

3. On the Manage Orders page, set the following attribute, and then click **Search**.

Attribute	Value
Status	Equals Processing

   You can create a new version of a sales order only if it is in Processing status.

4. On the Manage Orders page, in the Order column, click an **order number**.
5. Click **Actions**, and then click **Create Revision**.

   Order Management stops processing for the sales order, creates a new draft that you can modify, and adds a version number in parentheses immediately after the order number to indicate each version that you create. For example, the following value indicates the second version that you created for this sales order:

   o Create Order Revision: Computer Service and Rentals - 294078 (2) - Draft

6. Edit the sales order, as necessary, and then click **Submit**.

   Order Management creates a new sales order, and then displays the new order number. For example:

   o Computer Service and Rentals - 294079 - Processing

Order Management increments the version number each time you create a new version. To view each version:

1. Navigate to the Overview page, and then use the Search field to locate and open the sales order.
2. On the Manage Orders page, notice the versions.

   You can revise only the current version. You cannot revise an earlier version. For example, assume you create a sales order, revise it, Order Management displays (2) in the status line, you revise it again, and Order Management displays (3) in the status line. In this situation, you can revise only version 3. You cannot revise version 2.

Note the following:

- You cannot revise a sales order that you have not yet submitted. Instead, you can edit the draft of this sales order.

- You cannot retrieve a sales order version that you discard.

- To cancel an order line that you have not submitted, on the Order Lines tab, click the **down arrow**, and then click **Delete**.

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- You cannot revise a shipped line. Instead, you must create a return order. For details, see Returning Sales Orders: Procedure.

Revising Sales Orders That Reference Configured Items

If you revise a sales orders that references a configured item, then you must make sure the change order that references this item includes all of the order lines. These order lines reference options for the configured item. You must also make sure that the change order references these same items, and then resubmit your change order.

For example, assume you create a sales order that includes six order lines. Some time later, you must modify the date on only one order line, such as line 2. In this example, to maintain the sales order, you must send all six lines of the sales order even if you modify only one line. For example, assume Order Management displays a message that is similar to the following:

- `Version 2 of change order 237864 is rejected because child order lines 3,4,7 of order line 2, of model PTO54222, are missing.`

In this example, the model includes order line 2, but child order lines 3,4, and 7 of line 2 are missing. You must make sure the change order includes these child order lines.

Related Topics

- Processing Change Orders: How it Works

Canceling Sales Orders: Procedure

You can cancel a sales order that is in Processing status.

Cancel a sales order:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Advanced**.

   As an alternative, if you know the sales order number, then you can search for it on the Overview page.
3. On the Manage Orders page, set Status to Equals Processing, and then click **Search**.

   You can only cancel a sales order that is in Processing status. If Order Management Cloud already shipped the sales order or one or more order lines, then you must create a return order instead. For details, see Returning Sales Orders: Procedure.
4. On the Manage Orders page, in the Order column, click an **order number**.
5. On the Order page, click **Actions**, and then click **Cancel Order**.

   Order Management immediately stops order fulfillment for the sales order and cancels the sales order.

Canceling Remaining Quantity

If you set Allow Partial Shipments of Lines on the Shipment Details tab to Yes, and if Order Management has shipped only some of the order lines, then you can click Cancel Remaining Quantity to cancel the quantity that Order Management has not yet shipped.

If your order line includes a split fulfillment line, and if Order Management splits this line when it ships the sales order, then the sales order is partially fulfilled. You cannot revise the part of the line that Order Management already fulfilled, but you can cancel the remaining quantity that it has not fulfilled. For example, assume you order a quantity of ten on an order line and Order Management ships seven of them. In this situation, you cannot increase the quantity but you can decrease it to any value of zero to three. You can also click Cancel Remaining Quantity to cancel the remaining quantity of three.

Order Management does this work even if it fulfills the sales order from multiple warehouses. For example, assume Order Management splits a fulfillment line during scheduling so that it fulfills the lines from three different warehouses, thus producing three split lines, and that Order Management ships one of these lines. You cannot cancel the shipped line, but you can cancel the two lines that Order Management has not shipped. Assume you order a quantity of ten, Order Management splits this sales order into three lines, and fulfills each line from the following warehouses:

- Seven items from warehouse A

- Two items from warehouse B

- One item from warehouse C

Assume it ships seven items from warehouse A, but has not shipped any items from warehouse B or warehouse C. In this situation, you cannot cancel the items that Order Management shipped from warehouse A, but you can cancel two items from warehouse B, and one item from warehouse C.

Related Topics

- Processing Change Orders: How it Works

Returning Sales Orders: Procedure

You can return the items that Order Management cloud has shipped to a customer. You create a return order that returns the items from the customer to your organization.

Return a sales order:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Advanced**.

   As an alternative, if you know the sales order number, then you can search for it on the Overview page.
3. On the Manage Orders page, set the following attributes, and then click **Search**.

Attribute	Value
Open	Equals No
Status	Equals Closed or Equals Partially Closed

   You can only return a sales order that is in Closed status or Partially Closed status. If Order Management has not shipped the sales order, then you can cancel the sales order instead. For details, see Canceling Sales Orders: Procedure.
4. On the Manage Orders page, in the Order column, click an **order number**.
5. On the Order page, in the Order Lines area, do one of the following:

   o **Return some of the order lines.** Choose the order line you must return, and then click **Return**.

     To return more than one line, hold down the SHIFT key, click **each line** that you must return, release the SHIFT key, and then click **Return**.

   o **Return all order lines.** Click **Return**, and then click **Return All**.
6. In the Return Items dialog, choose values for each of the items that you must return, and then click **Create Order**.

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Attribute	Description
Return Quantity	Enter a value up to the quantity that you originally ordered for this order line, minus the quantity of all prior returns for this item. For example, assume you originally ordered 10 items and you returned four of these items in a prior return. In this situation, the returnable quantity is six, so you can return up to six items.
Return Type	Choose one of the following values: o **Cancel the Item.** Use this value to cancel an item that does not include a shipment. For example, a contract for wireless phone service typically does not include a shipment, so the customer cannot physically return it, but you can cancel it. o **Return for Credit.** Use this value for an item that typically ships to the customer but that the customer cannot return for some reason. For example, the customer received the item but it was severely damaged, or the customer never received the shipment. o **Return for Credit and Return Item.** Use this value for an item that the customer must return.

Each order line that you choose must be a returnable order line that includes a returnable quantity. If the item is not returnable, then you cannot return it, and the Return button might not be active.

7. On the Create Order page, modify the return as needed, and then click **Submit**.

8. Note the value that Order Management assigns for the order number, such as 258206.

   You can use this number to get details about this return during subsequent work in the return lifecycle.

9. Optional. Monitor your return:

   o Click **Actions**, and then click **Switch to Fulfillment View**.

   o Click **Returns**.

   o in the Orchestration Process Number column, click the **number**.

   o In the Orchestration Plan tab, periodically monitor the status for each task. A return typically includes the following tasks:

Task	Description
Return Receipt	Tracks when the warehouse receives the return item from the customer, such as Awaiting Receiving.
Invoice	Tracks the status of the invoice, such as Not Started.

10. Optional. Receive the return order. If you receive the physical items that the customer returns as part of your job responsibilities, then you can use Oracle Fusion Receivables to receive the return order. For details, see Receiving Returned Items: Procedure.

Related Topics

- Processing Change Orders: How it Works

Receiving Returned Items: Procedure

A user in the warehouse typically receives a returned item. However, you can use Oracle Fusion Receivables and Order Management Cloud to receive the items that a return order references.

Summary of the Work

To receive returned items, do the following work:

1. Receive the item.
2. Verify that Order Management updated the order status.
3. Create a credit for the return.
4. Verify that receivables credited the invoice.

Receive the Item

Receive the item:

1. Make sure you created a return order for the items that you must receive.

   You must create this return order before you can receive these items. For details, see Returning Orders: Procedure.
2. Log into an Oracle Fusion Application with order administrator or order manager privileges.

   You must use these privileges to complete this procedure.
3. In the Navigator, under Warehouse Operations, click **Receipts**.
4. Click **Receive Expected Shipments**.
5. On the Receipts page, in the Search area, set the following attributes, and then click **Search**.

Attribute	Value
Document Type	Return Material Authorization
Document Number	Enter the return order number. For example, enter 258206.

6. In the Search Results, click the **line** that includes your return order, and then click **Receive**.
7. In the Receive Lines list, set the following attributes, and then click **Create Receipt**.

Attribute	Value
Quantity	Enter the quantity that you received at the loading dock in the warehouse.
Received By	Enter your name.

8. On the Create Receipt page, click **Submit**.
9. In the Confirmation dialog, note the receipt number, and then click **OK**.
10. Examine the contents of the box that includes the items that you received. Make sure they match the Item Description.
11. On the Receipts page, click **Put Away Receipts**.

    Put Away Receipts moves the returned item to a storage location in the warehouse.

12. On the Put Away Receipts page, in the Advanced Search area, in the Receipt attribute, enter the number that you noted in step 8, and then click **Search**.
13. In the Search Results area, click **Put Away**.
14. In the Put Away Lines page, set the following attribute, and then click **Submit**.

Attribute	Value
Subinventory	Enter a value that describes where you are physically placing the returned item. For example, enter Stores.

15. Notify Order Management that you received the item. Run the Send Receipt Confirmation scheduled process. In the Process Details dialog, set the following parameters.

   For an example that describes how to run a scheduled process, see Uploading Your Source Data into Oracle Fusion Applications: Procedure.

Parameter	Value
Organization	Choose the organization that identifies the customer. This value is typically the Business Unit from the sales order, such as Vision Operations.
Source System	Choose the source system that Order Management uses. For example, choose GPR.
Source Order Number	Optional. Enter the return order number. For example, enter 258206. You can enter a value in the Source Order Number field or in the Receipt field.
Receipt	Optional. Enter the receipt number that you noted in step 2.

16. Make sure the Status field for this scheduled process displays Succeeded.

Verify That Order Management Updated the Order Status

Verify that Order Management updated the order status for the return:

1. In the Navigator, click **Order Management**.
2. On the Overview page, query for your return order.

   For example, query for order 258206.
3. On the Order page, in the Order Lines tab, verify that the status for this order is Awaiting Billing.

Create a Credit for the Return

Create a credit for the return:

1. Run the Import AutoInvoice scheduled process. In the Process Details dialog, set the following parameters.

Parameter	Value
Transaction Source	Choose Distributed Order Orchestration.
From Sales Order Number	Enter the return order number. For example, enter 258206.

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Parameter	Value
To Sales Order Number	Enter the return order number. For example, enter 258206.

2. Make sure the Status field for this Import AutoInvoice scheduled process displays Succeeded.

   If the list includes the Import AutoInvoice: Execution Report scheduled process, then ignore it.

3. Verify that Order Management updated the order status for the return. Make sure the status for the return order line in the Order Management work area is Closed.

Verify That Receivables Credited the Invoice

Verify that Oracle Fusion Accounts Receivable credited the invoice for the return amount:

1. Locate your order in Order Management.
2. On the Order page, click **Actions**, and then click **Switch to Fulfillment View**.
3. Click **Returns**, click **Actions**, and then click **View Fulfillment Details**.
4. In the Fulfillment Details dialog, click **Billing**, and then make sure the value in the Invoice Amount field includes a reduction that is equal to the return amount.

   For example, if the Total of the original order was $500, and if the return amount is $200, then make sure the Invoice Amount displays a value of $300.

Related Topics

- Processing Change Orders: How it Works

Managing Imported Orders: Explained

Some organizations import source orders from another order management system into Order Management Cloud. You can manage these imported orders in Order Management the same way that you manage a sales order that you create in Order Management.

Order Management handles an imported order in the same way that it handles a source order that you create in Order Management. For example, you can edit an imported order, and then submit it. You cannot export a sales order to the source system, and Order Management does not update the source system with any modifications that it makes to a sales order. However, the source system can request details about the order status.

The order title displays information about the source order. For example, consider the following order title:

- Source Order BAT-ALOP-0005-1418288641111- LEG | Currency = US Dollar

where:

- **BAT-ALOP-0005-1418288641111** is the source order number.
- **LEG** is the name of the source system. For example, LEG is an abbreviation for the term legacy. Some organizations use the phrase **legacy system** to describe an older order management system that they are replacing with a newer one.
- **Currency = US Dollar** identifies the currency that the source order uses. Order Management uses currency so that it can interpret pricing values.

If the source order includes a revision number, then it also displays this number.

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To identify the source system for a sales order:

1. On the Overview page, enter the order number in the Search field, and then press **ENTER** on your keyboard.
2. On the Manage Orders page, in the Order column, click the **order number**.
3. On the Order page, click **Actions**, and then click **Switch to Fulfillment View**.
4. Examine the fields that identify information about the source system, such as Source Order System.

Related Topics

- Transforming Source Orders to Sales Orders: How It Works

- Managing Sales Orders: Overview

FAQs for Creating and Managing Sales Orders

How can I find a customer?

If you search the Customer field for a customer but Order Management Cloud cannot find this customer, then your order administrator must add the customer before you can create the sales order. For details, ask your order administrator.

How can I edit all attributes?

Your organization might use a processing constraint that does not allow you to edit an attribute. If you must edit an attribute that a processing constraint constrains, then it is recommended that you contact your order administrator.

Related Topics
- Processing Change Orders: How it Works

Why does my sales order include negative values?

If your sales order includes an item that someone returned, then Order Management Cloud does the following work:

- Displays this return in a separate order line on the Order page .

- Displays the price of each returned item in red font.

- Subtracts the value of each return from the order total.

- If the values of the returns are greater than the value of the order lines that Order Management has not returned, then it uses red font to display the value in the Total attribute. This red font indicates that the value is negative.

Related Topics
- Processing Change Orders: How it Works

Why does the status icon not match the item I searched?

If you query the user request number and status to get the results of a mass action, then the results might be different than what you expect because Order Management Cloud might not have completed the mass action for every fulfillment line that the mass action updates. For example, if you search for user request number 123 and user request status Completed, then the search results display the completed fulfillment lines, but Order Management might display the Processing status icon on some of the fulfillment lines because it is processing some other user request for these lines.

Related Topics
- Processing Change Orders: How it Works

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- Transforming Order Lines to Fulfillment Lines: How it Works

Why are some items not displayed in my Watchlist?

Items might be hidden based on your Watchlist preferences. These preferences also apply to saved searches that you're using as Watchlist items. To review your preferences, click your user name in the global area, and go to **Personalization - Set Preferences - Watchlist**.

It's also possible that:

- You deselected saved searches in the Manage Watchlist dialog box, so they're no longer used as Watchlist items.

- You deleted saved searches that were used as Watchlist items.

- Your administrator disabled specific predefined Watchlist items or categories for all users.

- Your administrator disabled using saved searches (from specific pages) as Watchlist items.

- Your administrator revoked access to tasks or pages that used to be available to you.

In these cases, you can no longer see the corresponding Watchlist items in your Watchlist and in your Watchlist preferences.

Related Topics

- Displaying and Hiding Watchlist Items: Procedure

- Creating Watchlist Items: Procedure

Managing Order Lines

Recurring Charges and Sales Order Total: Explained

If you add an order line that includes a recurring charge, then Order Management Cloud uses text in the Your Price field to indicate this charge.

For example, the following value describes a recurring charge of $1,200.00 that occurs every month:

- 1,200.00 per Month

If an order line includes a recurring charge, then Order Management sums only the one-time charges on this order line. It does not include the recurring charge in the Amount field of the order line. If an order line includes only a recurring charge, then Order Management displays a value of 0 in the Amount field. A recurring charge occurs in a specific time period, but the total includes only the amount that is currently due. This time period might occur sometime after the date when the amount is due.

Displaying Available Quantity in Sales Orders: Procedure

You can display the quantity that is currently available for each of your order lines.

Display the quantity that is currently available for an order line:

1. Enter a value in the Quantity attribute of an order line.
2. Press the TAB key on your keyboard.

Order Management Cloud examines the inventory that is available in all fulfillment systems, and then displays information in the On Hand column of the Order Lines tab. This message describes the availability for each item that you add to a sales order.

The On Hand column displays one of the following values.

On Hand Value	Description
In Stock	The available quantity is greater than the quantity that you entered. Order Management can fulfill this order line.
Low Inventory	The available quantity is less than the quantity that you entered, but is greater than zero. Order Management can fulfill only part of this order line.
Out of Stock	The available quantity is zero. Order Management cannot fulfill this order line.
There is no value or it displays No Data Was Retrieved	Order Management cannot communicate with the fulfillment systems for some reason, probably because the Global Order Promising server is not running, a communication problem exists in the network, or the order administrator has not set up availability rules for the item. For details, ask your order administrator.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Routing Requests to Fulfillment Systems: Procedure

Editing Order Line Details: Procedure

You can use the Line Type field to specify custom processing that Order Management Cloud must perform for an order line.

Edit line details:

1. On the Create Order page, click the **down arrow** on an order line, and then click **Edit Line Details**.
2. In the Line Details dialog, set the values, as necessary.

   For example, set the Line Type to Buy to assign the line to a different price, or to some other value to customize how Order Management processes the line during order fulfillment. Your order administrator specifies the values that the Line Type field contains and the processing that Order Management does according to these values. For details, ask your order administrator.

Configure and Add: Explained

You can use the Configure page to choose options from a list of options for a configured item. The Configure page enforces constraints while you configure the item. These constraints make sure the options that you choose work together correctly. You can add your configured item to the sales order right away, or save it for later.

If your search for an item on the Order Lines tab of a sales order returns a configured item, then Order Management Cloud displays the Configure and Add button. Click it to display the Configure page and add the configured item. For example, assume your company sells computers. You can use the Configure page to make sure the components that you add to a

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computer work correctly with one another, such as the type of hard drive, how much memory you can add, the software you can include, and the type of wireless hardware you can include.

For another example, assume your company sells wireless telephone services. You can use the Configure page to make sure the services that you add to a wireless service plan work together correctly, such as international service, international texting, or high-speed data access.

Note the following points:

- Order Management adds a pencil icon immediately toward the right of the item on the order line after you use the Configure page. You can click it to modify a configured item.

- You might not be able to change the quantity for some options on the Configure page, depending on how your order administrator configures this item. For example, if the configured item is a laptop computer, and if this computer can accommodate only one hard drive, then your order administrator might administer the Configure page so that you can add only a single hard drive to the item. For details about the options that you can choose for a configured item, ask your order administrator.

- You can view a configured item in the Fulfillment view just like any other item after you submit the sales order.

Editing Tax Information in Sales Orders: Procedure

You can modify tax information and apply it to each order line.

Some actions in Order Management might result in a change to the tax information that you can view. For example, assume you split a fulfillment line, Order Management lists a new warehouse, and this warehouse uses tax information that is different from the tax information that the previous warehouse uses. An order administrator can create a processing constraint that uses tax attributes, and can specify a tax attribute as an order attribute that identifies change as a way to control how you can make changes that might affect tax values.

Edit tax information:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Create Order**.
3. On the Create Order page, choose a value in the Customer attribute, such as Computer Service and Rentals.
4. On the Order Lines tab, add an item.
5. Click the **down arrow** on the order line, and then click **Edit Tax Determinants**.
6. Edit the following attributes, as necessary.

Attribute	Description
Taxation Country	Select the country that will collect the tax for this sales order. This is typically the country where the customer receives the item.
First-Party Tax Registration Number	Defaults to the tax registration number that your order administrator sets up for the legal reporting unit that is the first-party. This unit is associated with the customer that you choose in the Customer attribute.
	The tax registration is information related to a transaction tax obligation that the customer incurs with a tax authority that resides in the tax jurisdiction where the customer receives the item.
	Registering the details of a business with the tax authorities is an important legal requirement in many countries. You can assign a unique tax registration number to the parties that register with the tax authorities. These authorities use it to reference and track the tax implications for the party. A tax document, such as an invoice or tax return, typically references the registration number of the parties involved in a transaction.

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Attribute	Description
Transaction Business Category	Choose the business classification that Order Management must use to identify and categorize an external transaction into a tax transaction. For details, see: ○ Transaction Business Categories: Explained ○ Transaction Business Categories: Example
User-Defined Fiscal Classification	Specify additional classifications to determine and report tax on transaction. For details, see: ○ User-Defined Fiscal Classifications: Explained ○ User-Defined Fiscal Classifications: Example
Document Fiscal Classification	Specify the classification that a tax authority uses to categorize a document that is associated with a transaction for a tax. For details, see: ○ Document Fiscal Classifications: Explained ○ Document Fiscal Classifications: Example
Exemption Determinants section: ○ **Tax Exempt Flag** ○ Tax Exemption Certificate Number	Specify a full or partial exclusion from taxes. For details, see: ○ Tax Exemptions: Explained ○ Tax Exemptions: Choices to Consider
Product Category	Classify a noninventory product category that your organization uses for tax determination or for tax reporting purposes. For details, see: ○ Product Category Fiscal Classifications: Explained ○ Product Category Fiscal Classifications: Example
Product Fiscal Classification	Classify the item so that a tax authority can categorize the item for a tax. For details, see: ○ Product-Based Fiscal Classifications: Overview ○ Product Fiscal Classifications: Explained ○ Product Fiscal Classifications: Example

Related Topics

- Transaction Business Categories: Explained

- User-Defined Fiscal Classifications: Explained

- Document Fiscal Classifications: Explained

- Tax Exemptions: Explained

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Managing Attachments for Order Lines: Procedure

You can attach information to an order line, such as a file, URL, or text.

For example, you can attach a document file that includes requirements for manufacturing, text that describes how to negotiate a price, or a URL to a web page that describes how to assemble an item. You can use the Order Management work area to add or view an attachment. Order Management Cloud can accept an attachment as part of a source order. Order Management cannot accept an attachment from a fulfillment system, and it cannot send an attachment to a source system.

Manage an attachment for an order line:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Create Order**.
3. On the Create Order page, add a value in the Customer attribute.
4. In the Order Lines area, search for an item, and then click **Add**.
5. In the Amount column, click the **down arrow**, and then click **Manage Attachments**.
6. In the Manage Attachments dialog, click **Manage Attachments**.
7. In the Attachments dialog, attach your information, and then click **OK**.
8. In the Item column, notice that Order Management displays a **paper clip** that you can click to view your attachment.

Related Topics
- Transforming Order Lines to Fulfillment Lines: How it Works

Managing Shipment Details

Estimating Availability for Sales Orders: Procedure

You can click Estimate Order Availability on the Shipment Details tab to estimate the earliest delivery date for each order line according to the customer and shipment attributes that you specify.

Order Management Cloud displays this status in the Availability Status field. Use Estimate Order Availability when you must determine whether or not Order Management can fulfill the sales order before you submit it. The order fulfillment environment is constantly changing. For example, other sales orders might reserve the inventory that is available to fulfill your sales order, freight carriers might experience variation in their delivery times, and so on. So the availability status provides only an estimate according to the conditions that exist when you click Estimate Order Availability. When you submit the order, Order Management fulfills the sales order according to the conditions that exist in the order fulfillment environment at that moment, so the actual delivery time might be different than the estimate.

Estimate order availability:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Create Order**.
3. On the Create Order page, add a value in the Customer attribute.
4. In the Order Lines area, search for an item, and then click **Add**.
5. Click **Shipment Details**.
6. Click **Estimate Order Availability**.
   Order Management displays one of the following values in the Availability Status column according to the customer and shipment attributes that you specify.

Availability Status	Description
On Time	Order Management can fulfill the order line on time.
Delay of x Days	Order Management can fulfill the order line, but only after a delay. For example, a status of **Delay of 5 Days** indicates that Order Management will fulfill the sales order five days after the Requested Date.
Supply Not Available	Order Management cannot fulfill the order line.
No Data Was Retrieved	An error exists in the data or in the application setup. For details, ask your order administrator.

Modifying Attributes That Affect Availability Status

The following attributes affect availability status. If the Availability Status displays a delay, and if the customer cannot accept this delay, or if the status indicates that Order Management cannot fulfill the sales order, then you can modify one or more of the following attributes, and then click Estimate Order Availability again. Order Management updates and then displays the updated status when you adjust one of these attributes.

Attribute	Adjustment You Can Make to Reduce Delay
Request Type	Set to Arrive On.
Requested Date	Set to a later date.
Shipping Method	Set to a faster method. For example, change it from standard ground shipping to overnight priority shipping.
Ship Lines Together	Set to No. For details, see Ship Lines Together: Procedure
Latest Acceptable Date	Set to a later date.
Allow Partial Shipments of Lines	Set to Yes. For details, see Specifying Shipping Details: Explained.
Shipment Priority	Set to Yes. For details, see Shipment Priority: Procedure.
Warehouse	Set to a warehouse that is physically closer to the Ship-to Address, or who maintains a superior fulfillment performance.
Supplier	Set to a supplier who is physically closer to the Ship-to Address, or who maintains a superior fulfillment performance.
Supplier Site	Set to a supplier site that is physically closer to the Ship-to Address.
Demand Class	Set to a higher priority.
Allow Item Substitution	Set to Yes.

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Attribute	Adjustment You Can Make to Reduce Delay
Ship-to Address	Set to an address that is physically closer to the warehouse or the supplier.
Shipment Set	Leave empty.

For example, the following values that you set for the Request Type affects how Order Management calculates the Availability Status. Order Management will attempt to reduce or remove the delay for either value that you choose:

- **Ship On.** Order Management uses the date when it expects to ship the order line from the fulfillment source.
- **Arrive On.** Order Management uses the date when it expects the order line to arrive at the customer site.

In this example, assume the transit time is long for some reason. You can set the Request Type to Ship On to reduce or remove the delay.

For another example, assume you click Estimate Order Availability, and then the Availability Status field displays a delay for one or more order lines. If you set Ship Lines Together to:

- **Yes.** Click Estimate Order Availability, then Order Management sets all lines to the order line that contains the longest delay.
- **No.** Click Estimate Order Availability, then Order Management sets the Availability Status differently for each individual order line. Setting Ship Lines Together to No in this situation can help fulfill the sales order if the customer accepts receiving the order lines individually in separate shipments.

How Order Management Calculates Availability Status

Order Management communicates with Global Order Promising to calculate the availability status. Global Order Promising does the following work:

1. Determines the total inventory
2. Subtracts the committed inventory from the total inventory
3. Subtracts the expected ship date of the sales order from the expected arrival date of the sales order
4. Calculates the time required to ship the item from the warehouse to the customer
5. Calculates, and then communicates the availability status to Order Management

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Customizing Fulfillment Line Statuses: Explained

Overriding Order Lines: Procedure

Order Management Cloud automatically enters shipment details for a sales order according to the customer that you specify. You can override these details for each order line.

Override shipment details for an order line:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Create Order**.
3. On the Create Order page, add a value in the Customer attribute.

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4. In the Order Lines area, search for an item, and then click **Add**.
5. Click **Shipment Details**.
6. In the Availability Status column, click the **down arrow**, and then click **Override Order Line**.
7. In the Override Order Line dialog, set values for the attributes that you must override, and then click **OK**.

Note the following points:

- Order Management will use the override values that you provide only for this order line. If you must override values for other order lines, then you must use the Override Order Line dialog for each order line.

- If you override a value, and then modify a value in the order header, or in the header area of a tab, then Order Management does not remove your override. For example, assume you override the Bill-to Customer and the Requested Date in an order line. Assume you then modify the Bill-to Customer in the order header, and you also modify the Requested Date in the header area of the Shipment Details tab. Order Management will continue to use your override values for these attributes. If you prefer to use the values from the headers in this situation, then you must remove the override, and then modify the value in the header.

- You cannot set the value for some attributes in the Override Order Line dialog until you set the value for another attribute. For example, you must set the Ship-to Customer attribute before you can set the Ship-to Address attribute.

Order Management automatically sets an override in the following situations:

- You set Allow Partial Shipments to No.

- If you do not set the Shipping Method, Warehouse, or Supplier on the Shipment Details tab, and if you click Submit, then order fulfillment sets the value for each of these attributes, and Order Management overrides them with the values that order fulfillment sets. It also displays the Override icon on the View Order page and the Revise Order page for each order line that contains an override.

Related Topics
- Transforming Order Lines to Fulfillment Lines: How it Works

Shipping Order Lines in Shipment Sets: Procedure

You can use the Shipment Set attribute to add a shipment set. Order Management will ship together all the order lines that reside in the same shipment set. This feature is useful when the customer must receive all the order lines that a shipment set references in the same shipment but can receive other order lines separately or as part of another shipment set. You can create multiple shipment sets for a single sales order.

In this topic, you will add four order lines, and you will ship three of them together in one shipment set.

This topic includes example values. You might use different values, depending on your business requirements.

Ship order lines in a shipment set:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Create Order**.
3. On the Create Order page, add a value in the Customer attribute.
4. In the Order Lines area, search for an item, such as Sentinel 10000-S Tablet, and then click **Add**.
5. Repeat step 4 three more times to add the following items:

    o AS92888 Envoy Laptop Computer

    o VI74953 desk

    o CM15140 Monitor - 19"

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You can add a shipment set even if your sales order includes only one order line. To demonstrate this feature, it is recommended that you add at least four order lines. For this example, assume you must ship the laptop computer, desk, and monitor together in one shipment set, and you must ship the tablet in a separate shipment.

6. Click **Shipment Details**.

7. Add an order line to a new shipment set:

   o In the AS92888 Envoy Laptop Computer order line, click the **down arrow**, and then click **Override Order Line**.

   o In the Override Order Line dialog, click **Shipment Set**, and then click **Create**.

   o In the Create Shipment Set dialog, enter a name, such as Ship Set 1, and then click **OK**. You can enter any alphanumeric text for the name.

   o In the Override Order Line dialog, click **OK**.

8. Add an order line to a shipment set:

   o In the VI74953 desk order line, click the **down arrow**, and then click **Override Order Line**.

   o In the Override Order Line dialog, set **Shipment Set** to Ship Set 1, and then click **OK**.

9. Repeat step 8 for the CM15140 Monitor - 19" order line.

   Order Management will ship the AS92888 Envoy Laptop Computer, VI74953 desk, and CM15140 Monitor - 19" in one shipment, and will ship the Sentinel 10000-S Tablet in a separate shipment.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

Shipping Order Lines Together: Explained

If you set Ship Lines Together to No, then Order Management will ship each order line separately when the order line becomes available instead of waiting until all lines are available for shipping.

Setting Ship Lines Together to No might increase shipping costs for the entire sales order, but it can reduce the time required to ship a single order line. Set Ship Lines Together to Yes if the customer must receive the entire sales order in one shipment. For example, assume the customer orders a table and four chairs, and does not want to receive the table before receiving the chairs.

You set Ship Lines Together on the Shipment Details tab of a sales order.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

Specifying Shipping Details for Sales Orders: Explained

You can use the Shipping tab of the Shipment Details tab of a sales order to specify shipping details.

Setting the Latest Acceptable Date and the Earliest Acceptable Date

You can set the Latest Acceptable Date and the Earliest Acceptable Date to specify when the customer is willing to accept shipment. Note the following points:

- If you do not set the Latest Acceptable Date or the Earliest Acceptable Date, then Order Management Cloud will attempt to deliver the sales order no earlier than the Ordered Date, and no later than the Requested Date. Order Management typically defaults the Requested Date to the date that you created the sales order.

- You can set the Latest Acceptable Date to anytime after the Requested Date. If you set it, then Order Management will attempt to deliver the sales order no later than the Requested Date.

- You can set the Earliest Acceptable Date to anytime before the Requested Date. If you set it, then Order Management will not deliver the sales order before the Requested Date. This feature is useful if the customer cannot receive delivery until some point in the future. For example, the customer is traveling and will not be at the delivery site, or the delivery site is under construction.

Allowing Partial Shipments of Lines

You can use Allow Partial Shipments of Lines to allow Order Management to ship an individual order line in multiple shipments.

For example, assume you create a sales order that includes 100 units of a desktop computer on a single order line, you set Allow Partial Shipments of Lines to No, and then submit the order. Assume order fulfillment considers only Supplier A and Supplier B, and that Supplier A currently has 75 units on hand and Supplier B currently has 50 units on hand. In this situation, Order Management will delay the shipment until Supplier A or Supplier B has 100 units on hand, and then ship all units in a single shipment from this supplier. If you set Allow Partial Shipments of Lines to Yes, then Order Management will immediately fulfill the sales order. For example, it might ship 60 units from Supplier A in a separate shipment, and 40 units from Supplier B in another shipment.

These shipments might arrive at the customer site at different times, depending on how long it takes the supplier to assemble the order, variations in transit time, and so on. For example, the 60 units from Supplier A might arrive on October 1, and the 40 units from Supplier B might arrive on October 4.

It is recommended that you ask the customer to determine whether receiving the sales order in a single shipment is most important and potentially delaying it, or receiving the order in multiple shipments and potentially receiving it on different days.

Note that multiple shipments might increase transit cost.

Setting Other Attributes on the Shipping Tab

You can set the following attributes on the Shipping tab.

Attribute	Description
Shipment Priority	Prioritizes shipment for this sales order in relationship to other sales orders.
Shipping Instructions and Packing Instructions	Order Management sends the information that you include in the Shipping Instructions attribute and the Packing Instructions attribute to other applications that reside downstream in order fulfillment, such as Oracle Fusion Shipping, or some other application that your order administrator specifies.

Attribute	Description
	These downstream applications can print this information on packing slips or other shipping documents.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

Specifying Supply Details for Sales Orders: Explained

You can use the Supply tab of the Shipment Details tab of a sales order to specify supply details.

You can set the following attributes.

Attribute	Description
Warehouse, Supplier, and Supplier Site	In most situations, your order administrator creates rules that determine the Warehouse, Supplier, and Supplier Site, so you do not need to set them. However, you can use them to specify a drop shipment. For example, you can specify the manufacturer who will drop ship the item to the customer in the Supplier attribute and the location where this manufacturer resides in the Supplier Site attribute.
Demand Class	Places a priority during order fulfillment on this sales order when compared to other sales orders. If you do not specify a demand class, then Order Management fulfills this sales order on a first-come, first-serve basis. For example, assume you are an order manager at a company that is attempting to renew the approved supplier status with ABC Corporation. The negotiators at this corporation stated that they are considering not renewing the approved supplier status because of multiple sales orders that are late. You must make sure that these sales orders are not late. You search for all fulfillment lines for ABC Corporation, select all the fulfillment lines, open Edit Fulfillment Lines, and then set the Demand Class to High Priority.
Allow Item Substitution	Substitutes the item that the customer is ordering with some other item that still meets the customer requirement. For example, assume the customer is ordering a laptop computer with a 150 GB hard drive, and that the supply of 150 GB hard drives is low, but a surplus of 180 GB hard drives exists. In this situation, depending on the substitution rules that your order administrator sets up, if you allow item substitution, then Order Management will substitute the 180 GB hard drive for the 150 GB hard drive. This feature is useful when the inventory is low or out of stock and the customer cannot wait for Order Management to replenish the stock.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

Managing Billing and Payment Details

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Editing Recurring Billing: Procedure

If you add an item that includes recurring billing, then Order Management displays the recurring charge on the order line. You can edit how Order Management Cloud does this billing.

This topic includes example values. You might use different values, depending on your business requirements.

Edit recurring billing:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Create Order**.
3. On the Create Order page, add a value in the Customer attribute.
4. In the Order Lines area, search for an item that includes recurring billing, such as AS54600 Sentinel 9000-S Laptop, and then click **Add**.

   If you add an item that includes recurring billing, then Order Management Cloud displays the recurring charge on the order line and the sale price. For example, Recurring Sale Price (Month) 16.24, Sale Price 1,500.
5. Click **Billing and Payment Details**.
6. On the Billing and Payment Details tab, in the Order Line Details area, click the **down arrow** in the order line that includes the recurring billing that you must edit, and then click **Edit Recurring Billing**.
7. In the Edit Recurring Billing dialog, set the following attributes, and then click **OK**.

Attribute	Description
Contract Start Date	Select the start date for the contract. Most billing plans are associated with a contract. For example, a customer who subscribes to an online service typically signs a contract that describes a service agreement that includes a start date and end date.
Contract End Date	Select the end date for the contract. If the contract does not include an end date, then you can leave this field empty and Order Management will continue the contract in perpetuity.
Number of Billing Periods	Select the number of billing periods that this billing plan contains.
Recurring Billing Start Date	Select when to start the recurring billing.
Recurring Billing End Date	Select when to end the recurring billing. If the contract does not include an end date, then you can leave the Recurring Billing End Date empty, and Order Management will continue the billing in perpetuity.
Billing Plan Overrides	See the Setting Billing Plan Overrides section in this topic.

Note the following points:

- You can modify the attributes in the Edit Recurring Billing dialog in any sequence. No attributes are required, and no attribute affects any other attribute that the dialog displays.

- The Your Price column on the Order Lines tab does not display any overrides that you specify for recurring billing.

- Your order administrator sets up attributes in Oracle Fusion Accounts Receivables and Oracle Fusion Pricing for each customer. This setup determines the values that Order Management displays in the Edit Recurring Billing dialog. A range of factors can affect these values, such as pricing strategy, pricing segmentation, and so on. For details, ask your order administrator.

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Setting Billing Plan Overrides

Use the Billing Plan Overrides attribute to specify how to override each of the billing periods. For example, assume you set Number of Billing Periods to 12, and you use the following values in the Billing Plan Overrides section.

Period	Quantity	Amount
1	2	20.00
2	2	60.00
3	2	40.00
11	2	70.00
12	2	40.00

Order Management will do the following work:

- Use the values that you specify in the Override Amount attribute for periods 1,2,3,11, and 12.
- Use the default values for periods 4 through 10.
- Use the value that you specify in Override Quantity for billing period 1.
- Use the default quantity for all other billing periods.

Note the following points:

- The values that you enter affect only the period that you specify. They do not affect the default billing plan amount or any other billing periods.
- You can specify an override for up to five billing periods.
- You can specify only a single period in each override line.

Related Topics
- Transforming Order Lines to Fulfillment Lines: How it Works

Editing Recurring Billing: Example

You can use the Edit Recurring Billing dialog to set up a complex billing plan for a sales order. For example, you can use it to set up a plan that includes multiple contract periods, bills monthly, adds a fee for some services, and so on.

Assume you work for a company named Mega Phones, which sells subscriptions for mobile phones. You know from prior Mega Phones internal training that this service comes in one, two, and three year contract periods, that Mega Phones allows only monthly billing, but does allow enhanced service on a monthly basis, and that the enhanced service is $50 extra for each period. You also know that Mega Phones requires the following items:

- Set the contract start date to the same day that the customer calls to request service.
- Start service according to the date that the customer requests.
- Set the billing start date to the date that the service actually starts.

- Bill customers on the 20th day of each month.

Assume today's date is November 15, 2016, and that a customer calls and requests service for the following:

- Two year service agreement.
- Enhanced service in months 4, 5, and 6 because they want to use the Mega Phones unlimited international conferencing application during these periods.
- Start the service the next day, which is November 16, 2016.

You use the Edit Recurring Billing dialog to set up this plan. In this example, you set the following values in the top part of the Edit Recurring Billing dialog. For details about how to use this dialog, see Editing Recurring Billing: Procedure.

Attribute	Value
Contract Start Date	November 16, 2016
Contract End Date	November 16, 2018
Recurring Billing Start Date	November 20, 2016
Recurring Billing End Date	Leave empty.
Recurring Invoice Start Date	Leave empty. Order Management will use the date that you set for the Recurring Billing Start Date as the date to start the recurring invoice period. For details, see the How Accounts Receivables Sets Invoice Dates section in this topic.
Number of Periods	24 You must manually calculate the number of periods. In this example, the agreement is for two years, and the billing occurs monthly. So the calculation is 12 multiplied by 2 equals 24 periods. For another example, if the agreement is for three years and billed quarterly, then the calculation is 3 multiplied by 4 equals 12 periods.
Frequency	Month

You set the following values in the Billing Plan Overrides area of the Edit Recurring Billing dialog.

Period	Quantity	Amount
4	Leave empty.	50.00
5	Leave empty.	50.00
6	Leave empty.	50.00

How Accounts Receivables Sets Invoice Dates

In this example, Oracle Fusion Accounts Receivables does the following work:

- Sets the date for the first invoice to November 16, 2016, and includes billing for this invoice for November 16, 2016 through November 19, 2016, which is four days of service.

- Bills subsequent invoices monthly. For example, it sets the date for the second invoice to November 20, 2016, and includes billing for this invoice for November 20, 2016 through December 19, 2016.

- Sets the date for the last invoice to November 16, 2018, and includes billing for this invoice through November 16, 2016.

Setting an Invoice Date That Is Different Than the Billing Date

In some situations, your company policy might require an invoice date that occurs on a date that is different from the billing date. For example, assume Mega Phones policy requires you to create invoices on the first day of each month, but you set the Recurring Billing Start Date to November 20, 2016 because this is the date the service actually starts. To meet this requirement, you can set the Recurring Invoice Date to December 1, 2016. Oracle Fusion Accounts Receivables then creates the invoices on December 1 instead of November 20.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

FAQs for Using the Billing and Payment Details Tab

How do I edit billing and payment details that are disabled?

Order Management Cloud might disable some attributes on the Billing and Payment Details tab. For example, you must choose the Bill-to Location before you can choose the Bill-to Contact, and you must choose the Bill-to Contact before you can choose the Bill-to Method. Order Management might also disable some attributes depending on the value that you choose in the Customer attribute. For example, your order administrator might set up the customer so that it only uses one Bill-to Location.

How do I add custom values to a shipment or billing attribute?

Order Management Cloud allows you to choose values for some attributes according to the value that you choose for the Customer attribute. For example, it only displays contacts in the Bill-to Contact attribute who are associated with the customer. This behavior also occurs with the Bill-to Location, Ship-to Contact, Ship-to Method, Warehouse, Supplier, and so on. If you cannot find the value you require in one of these attributes, then your order administrator must add it. For details, ask your order administrator.

3 **Managing Order Fulfillment**

Monitoring Order Fulfillment

Order Management Statuses: Explained

Order Management Cloud displays a separate status for the sales order, fulfillment line, fulfillment task, and orchestration process. Each status indicates the progress of a sales order from beginning to completion. The statuses of the fulfillment lines, the orchestration processes, and the fulfillment task determines the order status. The Order Management work area displays these status values.

Order Management sequentially evaluates each of the status conditions that a fulfillment line contains while it processes a sales order. The true condition that contains the highest sequence number determines the fulfillment line status. Order Management then uses the status of the fulfillment line that has progressed the furthest in the sales order life cycle to update the order status.

Where Order Management Displays Status

Order Management displays status in the following locations.

Status	Where Displayed
Order Status	At the top of the Order page in the order title. For example, the order status of the following sales order is Processing: Order: Computer Service and Rentals - 282079 - Processing
Fulfillment Line Status	In the Order Lines area of the Order page. For example, the fulfillment line status of the following order line is Awaiting Shipping: Item, AS54888 - Standard Desktop, Status, Awaiting Shipping You can also click **Actions**, and then click **Switch to Fulfillment View** to view the fulfillment line status.
Orchestration Process Status	In the Status field of the Orchestration Process page. For example, Awaiting Fulfillment.
Fulfillment Task Status	In the Status column of the Orchestration Plan tab of the Orchestration Process page. For example, Awaiting Fulfillment.

Order Status

The status that Order Management displays for the sales order depends on the status of the order line.

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Order Status	Description
Draft	You saved the order to the database but have not submitted to order fulfillment. You can modify a Draft order.
Processing	You submitted the order to order fulfillment, but Order Management has not delivered all fulfillment lines to the customer. You cannot modify a Processing order, but you can revise it. For details, see Revising Sales Orders That You Already Submitted: Procedure.
Open	Order Management has not completed any order lines.
Partial	Order Management has completed some, but not all, order lines.
Reference	An earlier version of a revised order. For example, if you revise an existing sales order, and then click Submit, then Order Management displays the earlier version of the sales order with a status of Reference.
Closed	Order Management completed all order lines. You cannot modify a Closed order, but you can create a return order to return items from it. For details, see Returning Sales Orders: Procedure.
Canceled	Order Management canceled all order lines. It also removed the sales order from order fulfillment and did not reschedule it. You cannot submit a Canceled sales order to order fulfillment. If Order Management canceled only some order lines, then it ignores the canceled order lines, and sets the status according to the order lines that are open.

Order Line Status

The status that Order Management displays for the order line depends on the following statuses of the fulfillment line.

Order Line Status	Fulfillment Line Status
Open	Order Management has not completed any fulfillment lines.
Partial	Order Management has completed some, but not all, fulfillment lines.
Closed	Order Management completed all fulfillment lines.
Canceled	Order Management canceled all fulfillment lines. If Order Management canceled only some fulfillment lines, then it ignores the canceled fulfillment lines, and sets the status according to the order lines that are open.

Related Topics

- Orchestration Process Status: Explained

- Customizing Fulfillment Line Statuses: Procedure

- Transforming Order Lines to Fulfillment Lines: How it Works

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- Revising Sales Orders That You Already Submitted: Procedure

Jeopardy Score: Explained

Order Management Cloud maps the jeopardy score to a jeopardy priority, and then displays this score in the Order Management work area. This score provides a quick visual cue so that you can take action to reduce the delay.

How Order Management Displays Jeopardy Priority

A jeopardy priority references the fulfillment task that contains the highest jeopardy score. If multiple fulfillment tasks are in jeopardy in an orchestration process, then Order Management uses the highest jeopardy score when it displays the jeopardy for this orchestration process.

For example, assume the supply in the warehouse that the Carpet Processing orchestration process references is not sufficient, and that this insufficient supply causes a delay for the following fulfillment tasks:

- A three day delay for the Deliver Carpet task that results in a jeopardy score of 100 and a jeopardy priority of Medium
- A three day delay for the Invoice Carpet task that results in a jeopardy score of 200 and a jeopardy priority of High

Two hundred is the higher score, so Order Management uses the jeopardy score for the Invoice Carpet task to represent the jeopardy of the Carpet Processing orchestration process. It displays a jeopardy priority of High in the Order Management work area.

How Order Management Assigns Jeopardy Score to Fulfillment Tasks

Order Management assigns a jeopardy score to a fulfillment task according to the jeopardy threshold. If a fulfillment task is delayed, then Order Management calculates the difference between the required completion date and the planned completion date, and then searches for a threshold that applies to the largest number of entities that the fulfillment task references. It uses the following sequence when it searches for this threshold:

1. Search the process name, process version, task name, and task type.
2. Search the process name, process version, and task name.
3. Search the process name and task name.
4. Search the process name, process version, and task type.
5. Search the process name and task type.
6. Search the process task name.
7. Search the process name and process version.
8. Search the process name.
9. Search the task type.

For example, Order Management does the following work:

1. Search for a jeopardy threshold that applies to the task type, task name, process name, and process version. If Order Management does not find a threshold that applies to all of these attributes, then continue to step 2.
2. Search for a jeopardy threshold that applies to the process name, process version, and task name. If Order Management does not find a threshold that applies to all of these attributes, then continue to step 3.
3. And so on.

Order Management continues this work until it finds a threshold that applies to one attribute or a combination of attributes, and then sets the jeopardy score according to the threshold that it assigns to the fulfillment task.

The jeopardy score might change during replanning. If this change results in a change to the jeopardy priority, and if this jeopardy priority value is enabled, then Order Management updates the jeopardy values that it displays.

Related Topics

- Jeopardy Priority: Explained

- Jeopardy Threshold: Explained

- Defining Jeopardy and Lead Time to Manage Delay: Procedure

- Transforming Order Lines to Fulfillment Lines: How it Works

Monitoring Order Fulfillment: Procedure

You can use the Order Management work area to monitor order fulfillment for each of your sales orders.

Monitor order fulfillment:

1. In the Navigator, click **Order Management**.
2. On the Overview page, do one of the following:

    o Enter your order number in the Search field, and then press the **ENTER** key on your keyboard.

    o Click **Tasks**, click **Manage Orders**, and then search for your sales order.

    o Click a **bar** on one of the bar charts.

3. On the Manage Orders page, in the Order column, click your **order number**.
4. On the Order page, click **Switch to Fulfillment View**.

    You can use the fulfillment view to monitor and manage order fulfillment. This view displays the results of the order transformation, such as the fulfillment lines and orchestration processes that Order Management added to fulfill your sales order.

5. On the Fulfillment Lines tab, notice that Order Management added a separate fulfillment line for each order line that you created, and that each fulfillment line includes information about the order status and orchestration process:

Fulfillment Line	Customer	Item Description	Source Order	Order Line	Orchestration Process Number	Status
▶ ☰ 1-1	Computer Service	Desktop Chassis	422080	1	300100090333478	Not Started
▶ ☰ 2-1	Computer Service	Monitor - 19"	422080	2	300100090333457	Not Started

6. Click an **orchestration process number**, such as 300100090333478.
7. Examine the fulfillment tasks that the orchestration process scheduled to fulfill this fulfillment line, and the current status of each fulfillment task. You can also use this view to assess task progress. In the following example, the

jeopardy is low for each fulfillment task. None of the tasks have started. The orchestration process might not start a fulfillment task for a number of reasons, such as the Planned Start Date has not yet occurred, the Earliest Acceptable Ship Date might occur too far in the future, or other sales orders might have higher priority. For details about how to fix this situation, see Fixing Fulfillment Exceptions and Improving Fulfillment Performance: Procedure.
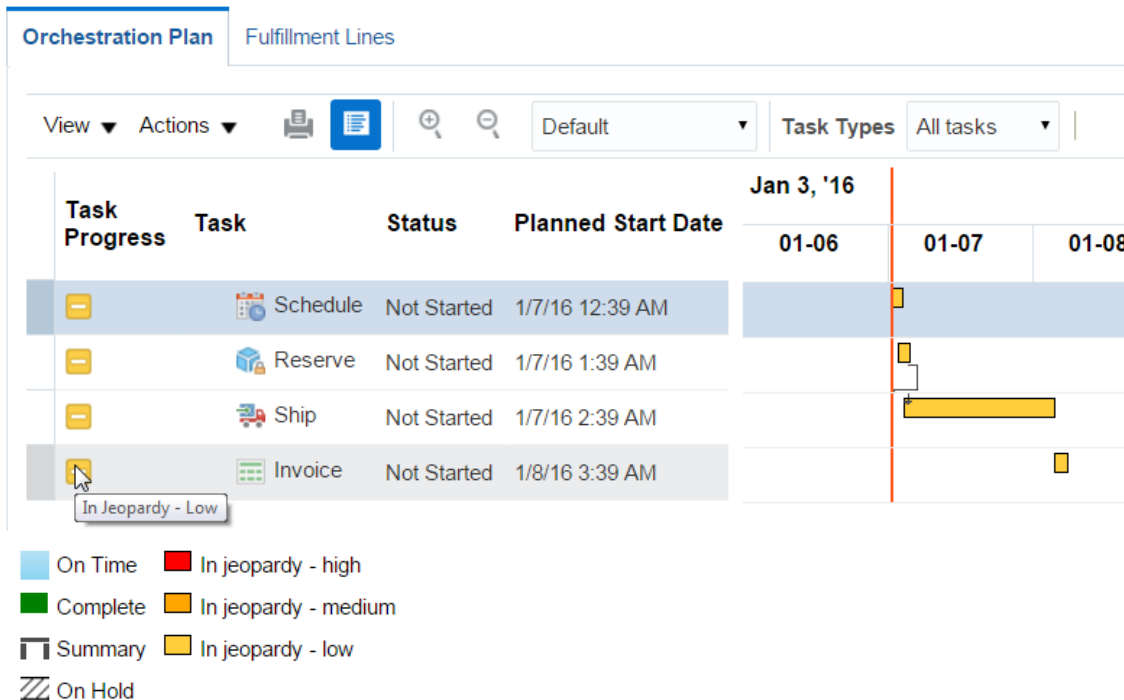
Related Topics

- Jeopardy Priority: Explained

- Jeopardy Threshold: Explained

- Defining Jeopardy and Lead Time to Manage Delay: Procedure

- Transforming Order Lines to Fulfillment Lines: How it Works

Using Order Management Analytics: Explained

You can use the reports and analytics features in the Order Management work area to get information about order status and to facilitate order fulfillment. You can get information about fulfillment lines, orchestration processes, shipments, and so on.

Order Management displays reports on different pages. For example, to view reports about fulfillment line exceptions, do the following:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Fulfillment Line Exceptions**.
3. On the Manage Fulfillment Line Exceptions page, expand the Analytics area, and then view the report.

Reports That Display Overview Information

You can use the following reports to get an overview of each fulfillment line status.

Report	Description
Fulfillment Lines by Exception	Displays information about open fulfillment lines, each of which might include multiple types of fulfillment line exceptions that occur at the same time.
	This report might count a fulfillment line more than one time. For example, if a fulfillment line is in jeopardy and on hold, then this report includes this line in the count of lines that are in jeopardy, and also in the count of lines that are on hold.
	You can also run other reports from the list of orders that Fulfillment Lines by Exception displays, such as Schedule, Check Availability, Substitute Item, Apply Hold, and so on.
Fulfillment Lines by Status	Displays only open fulfillment lines.
On-Time Shipment Percentage by Time	Displays the percent of sales orders where all fulfillment lines shipped on time.

Reports That Display Information About Fulfillment Line Exceptions

The following reports display information about items, customers, and sales orders for a fulfillment line. Analytics for each customer uses the customer party ID for the query.

Report	Description
Item Availability	Displays the following information about the item that a fulfillment line references:
	• **Available quantity.** Amount of inventory that is available to fill sales orders. It is the shelf quantity minus the allocated quantity.
	• **Shelf quantity.** Amount of inventory for an item that is currently on the shelf in the warehouse. It includes allocated and not allocated quantities.
	• **Allocated quantity.** Amount of inventory that Order Management Cloud currently reserves to fill a sales order.
Count of Holds for This Item by Hold Name	Counts the holds that Order Management applied to the sales order, order line, and fulfillment lines.
	A single fulfillment line might include multiple holds.
	Order Management caches this report and refreshes it according to the caching configuration. The data is not real-time.
Order Age by Time	Displays order age. This report uses the following calculation:
	• The system date minus the ordered date for open orders, divided by the last updated date minus the ordered date for closed orders
	The last updated date represents the closed date.
	If Order Management sets the date for a sales order at some time in the future, then a negative value might result.

Report	Description
	The Time axis displays according to the ordered date. For example, an order placed in May but closed in June displays on the May bar in the graph.
Order Value by Time	Displays the value in the currency that the Order Management work area uses. This currency might be different from the currency that the original transaction uses.
Open Orders for This Customer by Age	Uses the same calculation that the Order Age by Time report uses, except Open Orders for This Customer by Age only displays open orders for the record that you select. This calculation might result in a negative value.
Count of Holds for This Customer by Hold Name	Similar to the Count of Holds for This Item by Hold Name report, except the Count of Holds for This Customer by Hold Name report counts hold according to a customer.
Fulfillment Line Exceptions for This Order	Displays the open fulfillment lines for a single sales order. Each of these fulfillment lines might include multiple types of fulfillment line exceptions that occur at the same time. This report might count a fulfillment line more than one time. For example, if a sales order includes two fulfillment lines, and if each of these lines includes two exceptions, then the report counts four exceptions.
Value of Fulfillment Lines by Hold Type	Displays the value in the currency that the Order Management work area uses. If you import source orders from a source system, then this currency might be different from the currency that the source order uses. This report does not count an inherited hold more than one time. For example, assume Order Management applies a hold on a sales order, and the fulfillment line that this sales order references inherits this hold from the sales order. In this situation, this report counts the hold only one time.
Average Age of Orders by Hold	Uses the same calculation that the Order Age by Time report uses, except Average Age of Orders by Hold counts the number of holds that Order Management applied to a sales order. it does not count the holds that it applied to the fulfillment lines that this sales order references.

Reports That Display Information About Orchestration Process Exceptions

The following reports display information about orchestration process exceptions.

Report	Description
Orchestration Process Exceptions by Type	If an orchestration process includes more than one exception, then this report counts this process one time for each exception that it contains.
Average Process Duration by Time	Compares all orchestration process instances that Order Management has closed to the orchestration process that you select.
Count of Holds for This Customer by Hold Name	Counts the number of orchestration processes that are stopped because a task is on hold. The count includes the orchestration processes for a single customer.
On-Time Shipment Percentage by Time	Displays the percent of sales orders where all fulfillment lines shipped on time for a single customer.
Orchestration Orders by Time	Displays information about orchestration orders for the customer of the orchestration process that you select.

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Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

Why Order Management Disables Fulfillment Actions: Explained

Order Management Cloud disables some of the fulfillment line actions that you can perform in the Order Management work area.

Order Management might disable the following actions.

Action	Description
All fulfillment line actions, except view	Order Management disables this action in the following situations: • The fulfillment line is locked, canceled, closed, was shipped, or is part of a configured item. • The user request status is processing. • Order Management has not assigned an orchestration process to the fulfillment line.
Unschedule	Order Management disables this action in the following situations: • The fulfillment line is not scheduled. • The scheduled ship date does not contain a value.
Reserve	Order Management disables this action in the following situations: • The fulfillment line is not scheduled. • The Scheduled Ship Date does not contain a value. • The fulfillment line is reserved. • The reserved quantity contains a value.
Unreserve	Order Management disables this action in the following situations: • The fulfillment line is reserved. • The reserved quantity does not contain a value.
Substitute Item	Order Management disables this action in the following situations: • You selected more than one fulfillment line, but all of them do not reference the same item. • The Substitute Allowed feature equals False for the fulfillment line, and you do not use the privilege to override this restriction. • The fulfillment line is part of a configured item. • The fulfillment line is part of a shipment set.
Release Hold	Order Management disables this action if the fulfillment line is not on hold.
Split Fulfillment Line	Order Management disables this action in the following situations: • The fulfillment line belongs to a shipment set. • The Split Allowed feature equals False for the fulfillment line, and you do not use the privilege to override this restriction.

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Action	Description
	• You selected more than one fulfillment line.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Fixing Problems and Improving Fulfillment Performance: Procedure

Stopping and Resuming Order Fulfillment

Using Holds to Temporarily Stop Processing: Explained

Order Management Cloud uses holds to help manage order fulfillment.

Note the following behavior.

Behavior	Description
Automatically applying holds	Note the following points: • Order Management Cloud automatically applies a hold if a change from the Order Management work area requires Order Management to compensate the orchestration process. In this situation, Order Management sends a message to the fulfillment system to apply a hold so that fulfillment stops while Order Management compensates the orchestration process. • Order Management releases holds automatically during order compensation after it finishes compensation. This behavior applies only in Order Management. • An orchestration process can automatically apply a hold only when a hold request already exists in Order Management, in the source system, or in the fulfillment system. For example, assume an orchestration process is at the scheduling step when a source system sends a request to hold the shipping task. Order Management stores the request until the orchestration process reaches the shipping step. It then searches for existing requests, and then applies them.
Propagating holds	Note the following points: • Order Management transforms a hold that it receives from a source system or from a fulfillment system. This hold becomes part of the sales order. • If a source order includes a hold, then Order Management includes this hold on the fulfillment lines that it maps to the sales order. • If a fulfillment line includes a hold, and if Order Management splits this fulfillment line, then it includes the hold on each new fulfillment line that it creates to do the split. • If Order Management applies a hold to one or more lines in a shipment set, then it applies the hold to the entire shipment set.
Displaying and processing active holds	An active hold is a current hold on an orchestration process. Note the following points: • The Hold Source System attribute displays the location of where the hold was applied. • If a fulfillment line includes a hold, and if the orchestration process that this fulfillment line references has not yet reached the step that includes the hold, then Order Management might continue to run this process until it reaches the step that includes the hold.

Behavior	Description
	• If a fulfillment line includes a hold that Order Management has not released, then Order Management displays it as an active hold even if this line does not include an active hold.
Releasing holds	Note the following points: • You or an orchestration process can release a hold that you apply in Order Management only in the Order Management Work Area. • Only the user of a source system can release a hold that another user of this source system applied. • If you cancel an orchestration process, then Order Management releases any holds that reference this process. If you do not cancel an orchestration process, then you must manually release each hold and provide a release reason.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Fixing Problems and Improving Fulfillment Performance: Procedure

Using Holds to Temporarily Stop Processing: Procedure

You can manually apply or release a hold on an order line or fulfillment line to temporarily stop Order Management Cloud from processing this line. You can get details about current holds on an orchestration process. You can apply or release a hold only after you click Submit for a sales order.

You might need to place a hold for a variety of reasons. For example:

- You submitted a sales order and Order Management scheduled it for delivery. Later that day, the customer who placed the sales order realizes they cannot receive it because they will be out of the country for three weeks. The customer calls and requests to delay delivery for three weeks.

- You submitted a sales order and Order Management scheduled it for delivery. Later that day, the customer who placed the sales order realizes they need to verify their order to make sure it works for them, but need to do some investigation first. The customer calls and requests to delay delivery for one week.

- Personnel at the warehouse ask you to temporarily hold the shipment because a fire occurred in the warehouse.

- Your order administrator informs you that a problem might exist with an item, and requests that you temporarily hold all your sales orders that reference this item while your sales engineers investigate the problem.

Place a Hold On an Order Line

In this example, assume you submitted a sales order and Order Management scheduled it for delivery. Later that day, the customer who placed the sales order realizes they need to verify their order to make sure it works for them, but need to do some investigation first. The customer calls and requests to delay delivery for one week.

Place a hold on an order line:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Orders**.

   As an alternative, if you know the sales order number, then you can search for it on the Overview page.
3. On the Manage Orders page, enter the following value, and then click **Search**.

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Field	Value
Status	Equals Processing

You can place a hold only on a sales order that is in Processing status.

4. In the Search Results, in the Order column, click a **link**.
5. On the Order page, in the Order Lines area, note the value of the Status attribute.

The Status identifies where this sales order resides in order fulfillment. Use it to determine whether or not placing a hold will achieve the results you require. In this example, assume the status is Awaiting Shipping, which indicates that Order Management has scheduled the order line for shipping but has not yet shipped it to the customer. If the status where Shipped, then it would be to late to place a hold and you would have to request that the customer return the item.

6. On the Order page, in the Order Lines area, click **Apply Hold**.
7. In the Apply Hold dialog, set the following value, and then click **Save and Close**.

Attribute	Description
Hold Name	SHIP_ALL

Order Management includes several types of hold. In step 5, you determined that Order Management has not yet shipped the sales order, so you can use SHIP_ALL to temporarily stop processing for all shipping that Order Management performs for this sales order.

8. In the Order Lines area, to verify that Order Management placed a hold on the order line, make sure it displays the following On Hold icon.
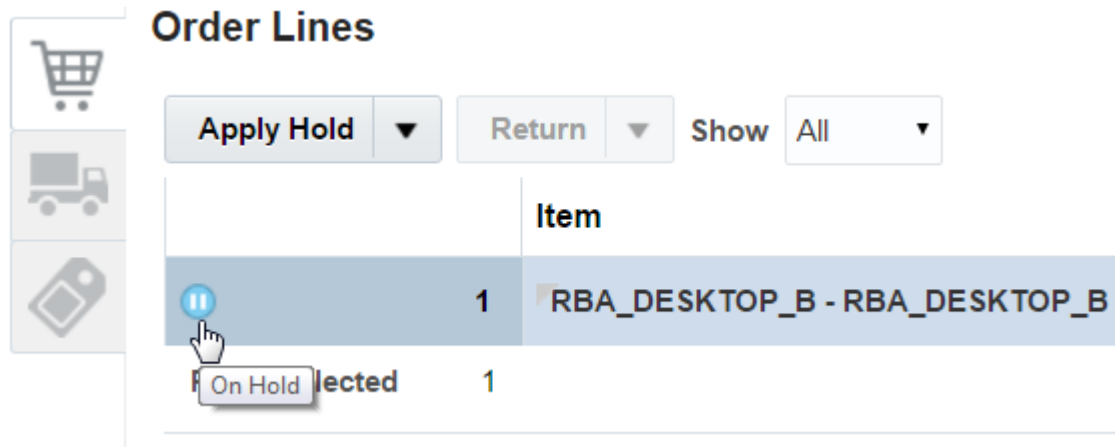
9. Assume the customer called, is now ready to receive the sales order, and you must release the hold. Click the **arrow** next to Apply Hold, and then click **Release Hold**.
10. In the Release Hold dialog, set the following values, and then click **Save and Close**.

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Field	Value
Hold Name	SHIP_ALL
Release Reason	Choose the most appropriate value.

Place a Hold On a Fulfillment Line

In some situations, you might need to place a hold on a fulfillment line instead of an order line. For example, if Order Management splits an order line into multiple fulfillment lines, and you must place a hold only on one of these split fulfillment lines but not the entire order line.

Place a hold on a fulfillment line:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Fulfillment Lines**.
3. On the Manage Fulfillment Lines page, search for your sales order.
4. In the Search Results area, click the **fulfillment line** that you must hold.
5. Click **Actions**, click **Holds**, and then click **Apply Hold**.
6. In the Apply Hold dialog, apply a hold, and then click **Save and Close**.

Get Details About Holds on an Orchestration Process

In some situations, you might need to get details about all the current holds that exist on an orchestration process. For example, you must investigate why a sales order has not shipped. You can identify the fulfillment tasks that an orchestration process references are on hold.

Get details about current holds on an orchestration process:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Orchestration Processes**.
3. On the Manage Orchestration Processes page, search for your sales order.
4. In the Search Results area, click the **fulfillment line** that you must hold.
5. On the Orchestration Process page, click **View Hold Details**.
6. In the Hold Details dialog, examine the fulfillment tasks that are on hold, including who applied them, why they were applied, and when they were applied.
7. If necessary, contact the person who applied the holds to determine how to fulfill the sales order.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Fixing Problems and Improving Fulfillment Performance: Procedure

Resuming Paused Sales Orders: Procedure

You can release a pause task so that the orchestration process can resume processing your sales order.

A pause task temporarily pauses processing to wait until a date or event occurs before proceeding to the next orchestration process step. A pause is not a hold. For details about releasing a hold, see Using Holds to Temporarily Stop Processing: Procedure.

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Resume a paused sales order:

1. Make sure you use the Order Orchestration Error Recovery Manager role.

   You must use this role to use this procedure. For details, ask your order administrator.
2. In the Navigator, click **Order Management**.
3. On the Overview page, click **Tasks**, and then click **Manage Orchestration Processes**.
4. On the Manage Orchestration Processes page, search for the sales order that you must resume.
5. In the Search Results, in the row that displays your sales order, in the Orchestration Process Number column, click the **link**.
6. On the Orchestration Process page, click **Release Pause Task**.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Fixing Problems and Improving Fulfillment Performance: Procedure

Managing Fulfillment Lines

Scheduling Fulfillment Lines Manually: Procedure

In most situations, Order Management Cloud automatically schedules a fulfillment line when it assigns an orchestration process to this fulfillment line. However, if the fulfillment line is currently processing a manual scheduling step, then you can schedule the line manually.

Schedule fulfillment lines manually:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Manage Fulfillment Lines**.
3. On the Manage Fulfillment Lines page, select one or more fulfillment lines.

   To select more than one line, hold down the CTRL key while you select each line.
4. Do one of the following:
   - Click **Check Availability**, and then select a scheduling option. If you select Override Schedule, then order promising does not calculate options.
   - Click **Schedule**.
   - Click **Actions**, click **Edit**, and then modify attributes that will reschedule the line, such as Requested Ship Date or Requested Arrival Date.

Note the following.

Manual Scheduling	Description
Unscheduling a fulfillment line	Order Management releases the supply so that it becomes available for some other, higher priority fulfillment line. If you unschedule a fulfillment line, then Order Management sets the status of this line to Awaiting Scheduling.
Scheduling a configured item or shipment set	If you select an option for one or more fulfillment lines, and if these lines are part of a configured item or shipment set, then Order Management applies the scheduling option that you select to all of the fulfillment lines that reference this configured item or shipment set.

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Manual Scheduling	Description

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

Splitting Fulfillment Lines: Explained

Order Management Cloud can split a fulfillment line into multiple fulfillment lines to improve order fulfillment performance. You can control some of this behavior.

Note the following behavior.

Split	Description
Manual split	Note the following: • You can use Split Fulfillment Line only for a sales order that is on a manual schedule task. For details, see Splitting Fulfillment Lines: Procedure. • To split a fulfillment line that is not on a manual schedule task, you can click **Unschedule** while the orchestration process is running, and then split the fulfillment line. Unschedule moves the orchestration process back to the schedule task, which now is a manual task. For details, see Fixing Fulfillment Exceptions and Improving Fulfillment Performance: Procedure. • Order Management does not run change management for a manual split. • Although you cannot use the Check Availability page to manually split a fulfillment line, the availability option that you select might implicitly split the fulfillment line.
Automatic split	Order Management might automatically split a fulfillment line in the following situations: • If you select a fulfillment option on the Check Availability page, then this option might require Order Management to split a fulfillment line so that it can provide the availability results that you require. • Some other fulfillment system might automatically split a fulfillment line.
Splits that Order Management does not allow	Order Management does not allow you to split fulfillment line in the following situations: • The fulfillment line does not include the Splits Allowed attribute. • The quantity of the fulfillment line is one or less. • The fulfillment line does not allow a split. If you use an override privilege, then you can override this restriction. • A task in the parallel branch of an orchestration process references the fulfillment line. • The fulfillment line resides in a shipment set. To split this line, you can remove it from the shipment set, and then split it.

How Order Management Determines Availability When it Splits Fulfillment Lines

If a fulfillment line allows a split or substitution, then Order Management examines possible substitutions when it determines availability.

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Where Split Occurs	Description
Split a fulfillment line across multiple warehouses	If the Requested Ship-from Warehouse attribute on the fulfillment line is: • **Empty.** Order Management considers multiple warehouses when it splits a fulfillment line. • **Not empty.** Order Management considers only the warehouse that the Requested Ship-from Warehouse references. It does not split the fulfillment line. Each fulfillment line that the split creates might specify a different value for the Expected Ship-from Warehouse attribute. Order Management uses business rules that your order administrator sets up to determine the warehouses it uses to supply the item.
Split a fulfillment line across substitute items	Order Management substitutes an item only if the Allow Substitutions attribute on the fulfillment line equals Yes. Each fulfillment line that the split creates might specify a different value for the Available Item attribute. For example, assume you create a fulfillment line that requests 100 units of an item. Assume supply for this item is 80 units and supply for the substitute item is 50 units. Check Availability will split the fulfillment line into the following fulfillment lines: • One fulfillment line that references 80 units of the item • Another fulfillment line that references 20 units of the substitute item
Split a fulfillment line across dates	If a fulfillment line requests inventory that is not sufficient on a given date, then Order Management splits this line across the following dates: • Creates one fulfillment line for the quantity that is available on the requested date. • Creates another fulfillment line for the remaining quantity that it will deliver on a later date. For example, assume you create a fulfillment line on November 15, 2016 that requests 100 units of an item, and that supply is available for this item on the following dates: • 70 units are available on November 15, 2016. • 40 units are available on November 30, 2016. Check Availability will split the fulfillment line into the following fulfillment lines: • One fulfillment line with on-time delivery of 70 units, with an expected delivery date of November 15, 2016. • Another fulfillment line with delayed delivery for 30 units, with an expected delivery date of November 30, 2016.

How Split Fulfillment Lines Affect Status

Order Management Cloud creates two or more instances of the same fulfillment task when it splits a fulfillment line. These tasks might include different statuses during processing.

Consider the following examples:

- Assume the status of the Schedule task for fulfillment line A1 is Not Scheduled, and the status of the Schedule task for fulfillment line A2 is Scheduled. In this example, Order Management examines the split priority of the task statuses, and then sets the orchestration process status to the task status that includes the highest split priority.

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- Assume Order Management splits a fulfillment line that results in two instances of the Schedule task. One of these tasks includes a Complete status, and the other task includes a Pending status. Assume the value of the split priority for Pending is two, and the value of the split priority for Complete is three. In this example, Order Management sets the orchestration process status to Pending.

Related Topics

- Fixing Problems and Improving Fulfillment Performance: Procedure

- Transforming Order Lines to Fulfillment Lines: How it Works

- Shipping Order Lines in Shipment Sets: Procedure

Splitting Fulfillment Lines: Procedure

You can split a fulfillment line in the Order Management work area.

For reasons why you might need to split a fulfillment line, see Fixing Fulfillment Exceptions and Improving Fulfillment Performance: Procedure.

Split a fulfillment line:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Fulfillment Lines**.
3. On the Manage Fulfillment Lines page, search for your sales order.
4. In the Search Results area, click a **fulfillment line**, click **Actions**, and then click **Split Fulfillment Line**.
   The Search Results displays the fulfillment lines that Order Management assigned to the sales order.
5. In the Split Fulfillment Line dialog, in the Split Lines area, click **Actions**, and then click **Add Row**.
   Order Management maintains the Ordered Quantity across all rows that you add.
6. Modify rows in the Split Lines area, as necessary, and then click **Save and Close**.
7. In the Warning dialog, click **OK**.
8. Notice that Order Management added another fulfillment line in the Search Results.

Note the following points:

- Order Management splits the entire orchestration process that the fulfillment line references any time it splits a fulfillment line.

- Order Management sets each attribute value of any fulfillment line that it splits to each of the attribute values that the original fulfillment line contains.

Related Topics

- Sourcing Items from Different Warehouses: Procedure

- Fixing Problems and Improving Fulfillment Performance: Procedure

- Transforming Order Lines to Fulfillment Lines: How it Works

Fulfilling Configured Items: Explained

Order Management Cloud fulfills a sales order that includes a configured item differently than how it fulfills a sales order that does not include a configured item.

Order Management does the following work during different stages of order fulfillment when a sales order includes a configured item.

Order Fulfillment Stage	Description
Schedule	Schedules a configured item like any other fulfillment line, except Order Management can only schedule a configured item that is complete. Assigns all the fulfillment lines that a configured item or shipment set references to the same orchestration process.
Split	Allows a split fulfillment line for the configured item, but not for child fulfillment lines. If a split occurs, then Order Management cascades this split to these child fulfillment lines.
Hold	Applies a hold on the configured item and on the child fulfillment lines.
Ship	Sends the shippable fulfillment lines that a configured item contains to the shipping system together as a single shipment set. If a configured item includes a partial shipment of fulfillment lines, then one of the following situations might result: • **Proportional split.** Results in a shipped configured item and an unshipped configured item. • **Nonproportional split.** Results in a partially shipped configured item that includes a separate structure.
Bill	Sends all the fulfillment lines that the configured item contains to the billing system together as a single group.
Return	If Order Management receives a partial return, then it separates the configured item into the following groups: • One group that includes the fulfillment lines that reference the items that Order Management received. It will move these lines to invoicing. • Another group that includes the fulfillment lines that reference items that Order Management did not receive or that it cannot return for some reason.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Shipping Order Lines in Shipment Sets: Procedure

- Creating Sales Orders: Procedure

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FAQs for Managing Fulfillment Lines

How can I search for closed fulfillment lines?

Use an advanced search to search for closed fulfillment lines and return fulfillment lines.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

What happens if I modify a fulfillment line?

If you modify a fulfillment line, then Order Management Cloud typically modifies the orchestration process that references this fulfillment line. A modification might include a manual change or an automatic change, such as a change order, edit to a fulfillment line attribute, or rescheduling. Order Management evaluates these modifications and determines the adjustments that it must make to accommodate them.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Revising Sales Orders That You Already Submitted: Procedure

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4 Fixing Exceptions and Improving Order Fulfillment Performance

Examining Error Messages for Sales Orders: Examples

If an error occurs in Order Management Cloud, or in some other application, such as a billing application, then Order Management displays the exceptions that are associated with the error so that you can view exception details and history, and then fix the problem that caused the error.

You can use the Manage Order Orchestration Messages page in the Order Management work area to view exceptions, such as fulfillment line exceptions. Use the following scenarios to learn how to use messages to resolve issues.

Order Management Receives a Warning

You are an order manager at a company that manufactures tables. The following occurs:

1. You notice a sales order for 100 burl tables.
2. Order Management scheduled and confirmed the reservation for the fulfillment line for this sales order.
3. The orchestration process sent a shipment request to the shipping system.
4. Personnel at the warehouse asks the sales representative to hold the shipment because a fire occurred in the warehouse.
5. The sales representative applies a hold on the sales order, and then sends the hold request to Order Management.
6. The shipping system cannot apply the hold because someone already picked and released the sales order.
7. The shipping system sends a warning to Order Management, and Order Management rejects the hold request.
8. The sales representative calls you on the phone to discuss the rejected hold request.
9. You do the following:
   - On the Overview page, click **Tasks**, and then click **Manage Order Orchestration Messages**.
   - On the Manage Order Orchestration Messages page, set the Order Orchestration Function to Equals Manage Hold, and then click **Search**.
   - Examine the details and explain the reason for the rejection.

Order Management Rejects a Change Order

You are an order manager at a company that manufactures stainless steel pipe. The following occurs:

1. You create a sales order for 100 pipes.
2. The customer calls to change the order quantity a few days after Order Management sends the shipment request to the shipping system.
3. You modify the sales order, and then submit the change order.
4. The shipping system already shipped the sales order, so Order Management rejects the change order and saves the error details.
5. You use the Manage Order Orchestration Messages page to examine the order details, and to search for and access the sales order so that you can determine the reason for the rejection.

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Process Assignment Rules are Missing

You are an order manager at a company that provides digital network service. The following occurs:

1. Order Management receives a source order, but does not assign an orchestration process to it because the process selection rules are missing.
2. You view the exception on the Manage Order Orchestration Messages page, and notice that the same error affects multiple sales orders.
3. You notify your order administrator, who then adds the process selection rules.
4. Some time later, the order administrator uses the Error Recovery privilege to activate the assign and launch process.
5. Order Management assigns the orchestration processes to the sales orders.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

Sourcing Items from Different Warehouses: Procedure

You can source items that are not available in one warehouse from a different warehouse. This technique can help to improve on-time delivery for your sales orders.

For example, assume you are an order manager at a company that supplies carpeting from various warehouses throughout the United States. You just found out that the New York warehouse is flooded due to a recent storm, but you know that the Boston warehouse includes sufficient supply. You search for all fulfillment lines that source carpet from the New York warehouse. You select all the fulfillment lines, open Edit Fulfillment Lines, and then change the warehouse to Boston.

Change the Warehouse

Order Management automatically sources each item according to the sourcing rules and warehouse ranking that it references. It also provides multiple options that you can use to schedule a sales order, including sourcing each item from a different warehouse. You can explicitly change the warehouse to try to improve order fulfillment performance.

Change the warehouse:

1. Identify a warehouse that contains the item and quantity that the fulfillment line requires. You can do one or more of the following:
    - Use the reports and analytics in the Order Management work area.
    - Examine the Availability pages.
    - Use Supply Availability reports.
    - Use the Supply Allocations reports.
    - Take action outside of Order Management Cloud.
2. In the Navigator, click **Order Management**.
3. On the Overview page, search for the order number.
4. On the Order page, click **Actions**, and then click **Create Revision**.
5. On the Create Order Revision page, click **Shipment Details**, and then click **Supply**.
6. In the Order Line Details area, click **Override Order Line**.

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7. In the Override Order Line dialog, set the Warehouse field, and then click **OK**.

Split the Fulfillment Line

If the warehouse contains only some of the quantity that the fulfillment line requires, then you can split the fulfillment line, and then select another warehouse to source the remaining quantity. For example, assume fulfillment line 1 requires 30 widgets. The fulfillment line is in jeopardy because the current warehouse, Warehouse A, has only 20 widgets. So, you split the fulfillment line, and then specify that the second fulfillment line to source the remaining 10 widgets from Warehouse B. For details, see Splitting Fulfillment Lines: Procedure.

Related Topics

- Splitting Fulfillment Lines: Procedure

- Transforming Order Lines to Fulfillment Lines: How it Works

Fixing Problems and Improving Fulfillment Performance: Procedure

Order Management Cloud automatically fulfills most sales orders. However, if you encounter a problem with a sales order, then you can use the the Manage Fulfillment Lines page to view the cause of the problem, and then fix it. You can also use this page to improve fulfillment performance.

The Manage Fulfillment Line Exceptions page displays fulfillment line exceptions that are past due, in jeopardy, backordered, and on hold. Most exceptions occur because an item is not available. More than one solution might fix an exception. How you fix the exception depends on your organization policies.

Use the Manage Fulfillment Lines page to fix exceptions or to improve fulfillment performance:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Fulfillment Lines**.
3. On the Manage Fulfillment Lines page, search for your sales order.
4. In the Search Results area, in the Order attribute, click the **link**.
5. On the Order page, use the following solutions that this topic describes.

Take Action on the Fulfillment Line

You can perform an action on a fulfillment line to fix fulfillment exceptions, or to improve fulfillment performance.

To take action on a fulfillment line, on the Fulfillment Lines tab, click **Actions**, and then click one of the following actions. To take action on multiple fulfillment lines, hold down the SHIFT key, click each line, and then use the Actions menu.

Action	Description
Schedule	Schedule a fulfillment line if the orchestration process that references this line includes a manual scheduling step, or if the fulfillment line is not scheduled.
	If you schedule a fulfillment line, then Order Management sends a request to the order promising process to schedule this fulfillment line.
Unschedule	Unschedule a fulfillment line to make supply available to a higher priority fulfillment line.

Action	Description
	If you unschedule a fulfillment line, then Order Management moves the orchestration process back to the scheduling step, sets the status to Awaiting Scheduling, and then releases supply so that other fulfillment lines can use it. You must manually schedule a fulfillment line that you unschedule.
Check Availability	Use Check Availability to reschedule the fulfillment line. It provides an effective way to reschedule a fulfillment line because it displays the scheduling options that are available, indicates the best option, and displays the information that you require to evaluate each option. Note the following: • Use Check Availability if you cannot get information about the supply, other than the information that the Order Management work area displays. • If Order Management already scheduled the fulfillment line, and if your selection changes the Scheduled Ship Date, then Order Management processes the change. • To source from a different warehouse, remove the value from the Warehouse attribute, and then click Check Availability. Order Management will recommend a warehouse according to sourcing rules and warehouse rankings. • Your order administrator defines the business rules that determines the best option and ranks the warehouses. For details, ask your order administrator.
Split Fulfillment Line	Split the fulfillment line to fulfill one part of this line from one warehouse, and another part from another warehouse. Use the analytics area to get information that might help identify the warehouse to use. For details, see Splitting Fulfillment Lines: Procedure.
Substitute Item	If you determine that a substitute can improve scheduling, then substitute an item. Order Management displays the best substitution according to rules that the item master contains. Use the analytics area to get information that might help identify the item to substitute. If you must substitute an item that is part of a shipment set, then you must remove the fulfillment line from the shipment set.
Reserve	Reserve supply to make sure it is available only for a specific fulfillment line. If you reserve supply, then Order Management removes this supply from availability so that other fulfillment lines cannot use it, and then reserves it for the fulfillment line that you select.
Unreserve	Release supply so that some other fulfillment line can use it, such as a higher priority fulfillment line that has an exception.
Holds	Release a hold on a fulfillment line so that processing can continue. If a hold exists on any part of a fulfillment line, then Order Management might not be able to complete the fulfillment process. A hold on part of an orchestration process can allow a fulfillment line to proceed, but it might arrive at a point where it stops and waits for a user to release it. For details, see Using Holds to Temporarily Stop Processing: Explained

Edit the Fulfillment Line

You can edit various attributes on a fulfillment line to fix fulfillment exceptions, or to improve fulfillment performance. You can also remove the value from a fulfillment line attribute to allow Order Management to choose the best fulfillment option without having to consider a specific value for the attribute. Remove values when you want to use Check Availability, but do not want Order Management to consider a specific fulfillment requirement.

Edit the fulfillment line:

1. On the Fulfillment Lines tab, click **Actions**, and then click **Edit**.

To edit multiple fulfillment lines, hold down the SHIFT key, click each line, and then use the Actions menu.

2. In the Edit Fulfillment Lines dialog, set one or more of the following attributes.

Attribute	Description
Source	Select Warehouse or Supplier in the Source option, and then set the Warehouse or Supplier attribute.
Warehouse or Supplier	Change the Warehouse or the Suppler that Order Management uses to source the item. You can use the analytics area to get information that can help to determine the warehouse to choose. For details, see Sourcing Items from Different Warehouses: Procedure.
Shipping Method	Change the Shipping Method to a faster method. You can also add a check mark to the Clear Contents option immediately next to Shipping Method to allow Order Management to choose the shipping method.
Demand Class	The Demand Class determines the priority that Order Management uses when it schedules the fulfillment line. Change the demand class when you must: o Schedule fulfillment lines as a group. o Make sure that some customers get supply before other customers. o Expedite fulfillment but the exact date is not important. Demand class applies only if the ATP rule uses supply chain search, and if Order Management uses allocation.
Scheduled Ship Date or Scheduled Arrival Date	Set Override Schedule to Yes, and then enter a value in one of the date fields, such as 12/22/15. The orchestration process will reschedule order fulfillment according to the date that you specify. The orchestration process calculates the shipping schedule when you create a sales order, including the Scheduled Ship Date and the Scheduled Arrival Date. If you are aware of an alternative to this schedule, and if you know the best date to schedule the fulfillment line, then you might consider overriding these dates.

3. Click **Save and Close**.
4. In the Warning dialog, click **OK**.
5. On the Fulfillment lines tab, scroll toward the right to verify the edits that you made.

For example, if you edited the Scheduled Ship Date, then scroll toward the right and verify that the Scheduled Ship Date attribute contains the value that you specified, such as 12/22/15.

Related Topics

- Splitting Fulfillment Lines: Procedure

- Using Holds to Temporarily Stop Processing: Explained

- Why Order Management Disables Fulfillment Actions: Explained

- Transforming Order Lines to Fulfillment Lines: How it Works

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Fixing Problems That Occur When Order Management Assigns Orchestration Processes: Procedure

Order Management Cloud assigns a sales order to one or more fulfillment lines during order fulfillment, and then attempts to assign an orchestration process to a fulfillment line or group of fulfillment lines. If a system failure occurs or if a problem occurs with an assignment rule, then Order Management might not assign an orchestration process.

For example, Order Management cannot assign an orchestration process if a rule that references the data set for the sales order does not exist, or if a system administrator has not set a default orchestration process.

To fix this problem, if you use the Error Recovery Manager role, then you can select Assign Lines to Process. You can also determine the reason for the assignment failure:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Order Orchestration Messages**.
3. On the Manage Order Orchestration Messages, examine the messages.

If you cannot resolve the problem, then it is recommended that you contact your system administrator and request to edit the assignment rules.

Related Topics
- Transforming Order Lines to Fulfillment Lines: How it Works

Fixing Errors in Sales Orders: Procedure

In most situations, Order Management Cloud finishes order fulfillment for each sales order to completion without error. If an error does occur, then you can use various features to fix it.

Restart Processing After You Fix Errors

Use the following features to restart processing after you fix an error. You must fix the root cause of the error before you use the feature. You must use the Error Recovery Manager role to use each feature.

Recover Sales Orders

Recover Order runs an orchestration process or fulfillment task that a sales order references starting immediately before the point where the error occurred. You can use it to recover from various errors, such as an orchestration process that has not started, or an orchestration process or fulfillment task that resulted in error. Note the following:

- This feature is available only when an error is associated with a sales order.

- You can select one or more sales orders to recover.

- You can recover sales orders in bulk. For details, see Fixing Errors in Multiple Sales Orders: Procedure and Fixing Errors in All Sales Orders: Procedure.

Recover sales orders:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Orders in Error**.

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3. On the Manage Orders in Error page, search for the sales order that you must recover.
4. In the Search Results area, click a **row**, click **Actions**, and then click **Recover Order**.

   The status determines whether or not you can attempt to recover a sales order. For example, you can attempt to recover a sales order if the Status attribute displays Processing, but you cannot recover a sales order that is Closed.

Recover Orchestration Processes

Recover Process runs an orchestration process starting immediately before the point where the error occurred. It attempts to recover an orchestration process that failed due to an error that is internal to this process, such as an error that occurs when Order Management runs an orchestration process step, or due to an error when this process runs a fulfillment task, such as an error that occurs when Order Management sends a request to a fulfillment system that is in an error state. Note the following:

- You can select one or more orchestration processes to recover.

- You can use this feature to recover all the fulfillment tasks that an orchestration process references.

Recover orchestration processes:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Orchestration Processes**.
3. On the Manage Orchestration Processes page, search for the orchestration process that you must recover.

   To filter for messages that contain an error, set Message Type to Error.
4. In the Search Results area, click a **row**, click **Actions**, and then click **Recover Process**.

Recover Fulfillment Tasks

Recover Task runs the fulfillment task starting immediately before the point where the error occurred. Use it to fix an error that occurs when Order Management attempts to send a request to a fulfillment system. Note the following:

- This feature is available only when a fulfillment task fails.

- To recover multiple fulfillment tasks, select multiple orchestration processes or sales orders, and then use Recover Process or Recover Order.

Recover fulfillment tasks:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, and then click **Manage Orchestration Processes**.
3. On the Manage Orchestration Processes page, search for the orchestration process that references the fulfillment task that you must recover.

   To filter for messages that contain an error, set Message Type to Error.
4. In the Search Results area, in the Orchestration Process Number column, click a **link**.
5. On the Orchestration Process page, on the Orchestration Plan tab, click the **row** that displays the fulfillment task that you must recover, such as FulfillOrder.
6. Click **Actions**, and then click **Recover Task**.

Assign Fulfillment Lines to Orchestration Processes

Assign Lines to Process attempts to assign a fulfillment line to an orchestration process. Use it to assign fulfillment lines that Order Management did not assign.

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Fixing Errors That Occur When Communicating with Web Services

The Manage Web Service Details page can reference services that reside on an order capture system or a fulfillment system. If Order Management must call multiple services on the same system, and if it cannot communicate with these services for some reason, then you can do the following work to attempt to fix the errors:

1. Log into Order Management with administrator privileges.

   You must use administrator privileges to perform this procedure.

2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage External Interface Web Service Details.
5. On the Manage Web Service Details page, click **Actions**, click **Add Row**, and then set the values, as necessary.
6. Navigate to the Manage Web Service Details page.
7. Add a separate row for each service that Order Management must call.
8. Use the same user name and password for each row that references the same system.

For example, assume an order capture system named ORA_BM_CPQ must communicate with Service_A and Service_B, and that the user name for this system is CPQ_user, and the password is CPQ_password. In this situation, you add the following rows on the Manage Web Service Details page.

Target System	Connector Name	User Name	Password
ORA_BM_CPQ	Service_A	CPQ_user	CPQ_password
ORA_BM_CPQ	Service_B	CPQ_user	CPQ_password

Fixing Errors That Occur Outside of Order Management

You must fix the following errors outside of Order Management.

Error	Solution
An error that occurs in a source order that fails during order import.	Fix the error, and then reimport the source order.
An error that occurs when Order Management processes a reply from a fulfillment system.	Fix the error, and then resubmit the reply.
An error that Oracle Enterprise Manager identifies as recoverable.	Fix the error, and then use Oracle Enterprise Manager to recover the error.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

- Managing Sales Orders: Overview

Fixing Errors in More Than One Sales Order: Procedure

You can click **Recover Order** to fix the errors that are associated with a single sales order. However, you can use this feature only to fix the sales orders that you can select in the Search Results list of the Order Management work area. This topic describes how to fix all the sales orders that the search returns, and not only the sales orders that you can individually select.

To fix errors in more than one sales orders:

1. Fix the problem that caused the error.

   If you do not fix the problem that caused the error, then the same error will continue to occur whether or not you run recovery, and running recovery will not restart processing.
2. In the Navigator, click **Order Management**.
3. On the Overview page, click **Tasks**, and then click **Manage Orders in Error**.
4. On the Manage Orders in Error page, enter a value in a required attribute, and then click **Search**.
5. In the Search Results area, in the heading row, click the **narrow column** immediately to the left of the Order column heading.

   This step selects all the sales orders that the search results contain.
6. Click **Actions**, click **Take Action On All Search Results**, and then click **Recover Orders**.

   Order Management attempts to fix all the errors in the sales orders that you choose contain.
7. If necessary, repeat step 6.

   Order Management can fix up to 5,000 sales orders each time you click Recover Orders. If more than 5,000 sales orders contain errors, then you must click Recover Orders repeatedly until it fixes all the sales orders that the search returns. To use a single action that fixes all errors, see Fixing Errors in All Sales Orders: Procedure.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

Fixing Errors in All Sales Orders: Procedure

You can click **Recover Order**, **Recover Process**, or **Recover Task** in the Order Management work area to fix errors that cause problems in your sales orders. However, these features can only fix errors that are associated with the sales orders that Order Management Cloud can return in a search from the Order Management work area. This topic describes how to fix all the errors that are associated with a set of sales orders, orchestration processes, or fulfillment tasks, and not only the errors that a search in the Order Management work area returns.

To fix errors in all sales orders:

1. Fix the problem that causes the error. If you do not fix this problem, then the same error will continue to occur whether or not you run recovery.
2. In the Navigator, click **Scheduled Processes**.
3. On the Scheduled Process page, click **Schedule New Process**.
4. In the Schedule New Process dialog, click **Name**, and then click **Search**.
5. In the Search and Select dialog, in the Name field, enter `Recover Errors`, click **Search**, click **OK**, and then click **OK** again.

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6. In the Process Details dialog box, configure various options, use **Process Options and Advanced** to set other options, and then click **Submit**.

    You can set various options to filter the sales orders that you must fix. For example, assume you set Customer Name to Computer Service and Rentals. Order Management will attempt to fix all errors that exist in all the sales orders that are associated with Computer Service and Rentals.

7. In the Confirmation dialog, click **OK**.
8. In the Search Results list, click **Refresh**, and then use the Status field to monitor the progress of your scheduled process.
9. Do one of the following, depending on the status value.

Status	Work You Must Perform
Error	In the Log and Output section, click the **Attachment** link, and then examine the results. In most situations, an Error status indicates that you must fix the root cause of the error, and then run recovery again.
Succeeded	View the log to determine how many fulfillment lines Order Management picked, how many it processed, and how many it could not process.

Related Topics

- Transforming Order Lines to Fulfillment Lines: How it Works

5 Appendix A: Reference Topics

Editing Tax Information for Sales Orders

Transaction Business Categories: Explained

Use transaction business categories to classify transaction lines to determine and report tax.

Transaction business categories provide a hierarchy of up to five levels. The first level is predefined with standard events that are supported by Oracle Fusion Tax. The predefined levels are:

- EXPENSE_REPORT
- INTERCOMPANY_TRANSACTION
- PAYMENT_REQUEST
- PURCHASE_PREPAYMENTTRANSACTION
- PURCHASE_TRANSACTION
- SALES_TRANSACTION
- SALES_TXN_ADJUSTMENT

Use the transaction business category functionality to add additional levels and transaction business categories to these levels.

> ✏️ **Note:** You can't add additional level one transaction business categories. You can only add additional transaction business categories that are children, or lower levels, of the predefined level one records.

When defining additional transaction business categories, use the **Country** field to specify the taxation countries where the transaction business category is used. During transaction time, the taxation country is used to restrict the list of transaction business categories available on the transaction line to those that have been set up with the same country or where the country is blank.

When setting up transaction business categories, leave the **Country** field blank or use the country name as defined on any parent level of the record that's being added.

Use the Associated Transaction Fiscal Classifications region to link a specific transaction business category to the transaction fiscal classification. You can use this association to allow different transaction business categories to be linked to the same transaction fiscal classification. This helps set up tax rules using a specific transaction fiscal classification instead of creating multiple tax rules for different transaction business categories.

> 💡 **Tip:** While setting up the transaction business categories, use different levels so that you can define all of the necessary tax rules at the highest level possible. This helps minimize the needed number of tax rules.

Transaction Business Categories in Tax Rules

The transaction business category tax determination factors allow you to use the transaction business category in tax rules. A combination of determination factor class, class qualifier, and determining factor represent these determination factors.

Use the transaction generic classification as the determining factor class, the level of the transaction business category being used, level 1, level 2, level 3, level 4, or level 5 as the class qualifier, and transaction business category as the determining factor.

When a country name is specified on the condition set, the application selects only those transaction business categories that match the country name or where the country name is blank on the transaction business category.

Transaction Business Categories at Transaction Time

During transaction time, enter the transaction business category on the transaction line to classify the transaction line for tax determining and reporting purposes.

The transaction business category is stored in the tax reporting ledger and is available for reporting.

Related Topics

- Tax Rules: Explained

Transaction Business Categories: Example

Transaction business categories classify transaction lines for tax determination and reporting.

The following scenario illustrates how transaction business categories can be used for tax determination and reporting in Brazil.

Scenario

In Brazil, you need to identify a transaction correctly to be able to report and determine the correct applicable taxes. Create specific transaction business categories as children of the sales transaction. The transaction business categories include:

Level	Fiscal Classification Code	Fiscal Classification Name	Country	Start Date
1	SALES_ TRANSACTION	Sales Transaction		1-Jan-1951
2	INTERSTATE MNFTRD FOR SALE	Interstate Manufactured for Sale	Brazil	The earliest transaction date or start date of tax.
2	INTERSTATE MNFTRD FOR MANUFACTURE	Interstate Manufactured for Manufacture	Brazil	The earliest transaction date or start date of tax.

To create these transaction business categories:

1. Select the **SALES_TRANSACTION** record on the Manage Transaction Business Codes page.
2. Click **Create Child Node**. The Create Fiscal Classification Code page appears.
3. Enter the values as shown in the above table. By default, the start date is the start date of the sales transaction parent record, that is, 1-Jan-1951.
4. Specify the latest of:

   a. Earliest applicable transaction to be used in the implementation.
   b. Start date of the applicable Brazilian tax.

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💡 **Tip:** Specify the country name while creating transaction business categories. This ensures that a limited applicable list is presented while entering the transaction business category during transaction or tax rule creation.

💡 **Tip:** Classify the nonstandard items as standard items while using the transaction business categories classification. This can be modeled as a default tax rule and therefore, doesn't require an explicit classification or an explicit tax rule. Classify only exception items and define specific tax rules for them. For a standard item, none of the explicit tax rules are applicable and the default rate applies.

User-Defined Fiscal Classifications: Explained

Use user-defined fiscal classifications when you need additional classifications to determine and report tax on transaction. Enter user-defined classifications on a transaction line at the time of transaction.

✏️ **Note:** You can define only one level of user-defined fiscal classification codes.

Use the **Country** field to specify the applicable taxation country, or leave it blank to use the user-defined fiscal classification across multiple countries. At transaction time, the transaction line will only display the user-defined fiscal classifications with the same taxation country, or where the country is blank.

User-Defined Fiscal Classifications in Tax Rules

The user-defined fiscal classification tax determination factors allow you to use user-defined fiscal classification in tax rules. A combination of determination factor class and determining factor represent these determination factors.

Use the transaction input factor as the determining factor class and user-defined fiscal classification as the determining factor.

The value entered against the condition set is the specific user-defined fiscal classification code or name and the same country or where the country on the user-defined fiscal classification is blank.

User-Defined Fiscal Classifications at Transaction Time

During transaction time, enter the user-defined fiscal classification on the transaction line to classify the transaction for tax determination and reporting purposes.

The user-defined fiscal classification is stored in the tax reporting ledger and is available for reporting.

Related Topics

- Tax Rules: Explained

User-Defined Fiscal Classifications: Example

Use the user-defined fiscal classifications when you need additional or more appropriate classifications to classify transactions for tax determination and reporting.

This scenario illustrates how you can use user-defined fiscal classification to identify if a customer is a foreign diplomat and therefore, exempt from value-added tax (VAT).

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Scenario

To model this scenario, create a user-defined fiscal classification that is added to a transaction line only when the customer is a foreign diplomat and VAT is exempted.

In practice, it's likely that most businesses monitor such transactions and therefore, specifically create a zero (0%) rate within the exempt tax status to allow monitoring of such situations. By reporting this specific 0% rate, all applicable transaction can be identified.

Create the following user-defined fiscal classification:

Fiscal Classification Code	Fiscal Classification Name	Country	Start Date
FOREIGN DIPLOMAT EXEMPTION	Foreign Diplomat Exemption	United Kingdom	The earliest transaction date or start date of tax.

Set up the following determining factor for the tax rule that defines the condition where the sales transaction is zero percent (0%) rated using the special exempt rate, tax status, and tax rate rule:

Determining Factor Class	Class Qualifier	Determining Factor	Operator	Value
Transaction Input Factor		User-Defined Fiscal Classification	Equal to	FOREIGN DIPLOMAT EXEMPTION

The tax rule, to apply a zero tax rate to a transaction, is applicable only when the user-defined fiscal classification is associated with the transaction line.

> 💡 **Tip:** Specify the country name while creating the user-defined fiscal classification. This ensures that only a limited applicable list is presented during transaction or tax rule creation.

Document Fiscal Classifications: Explained

Use the document fiscal classification in situations where the tax determination and reporting processes need the documentation associated with the transaction. Unlike other process classifications, document classifications are associated with the header of the transaction and therefore, apply to all the transaction lines on a transaction.

Document fiscal classifications provide a hierarchy of up to five levels. When defining the document fiscal classification codes, use the **Country** field to specify the taxation countries where the document fiscal classification is used.

During transaction time, the taxation country restricts the list of document fiscal classification on the transaction line to those that are set up with the same country or where the country is blank. When setting up the document fiscal classification, leave the **Country** field blank or use the same country that's defined on any parent level of the record that you're adding.

> 💡 **Tip:** While setting up the document fiscal classification, use different levels so that all the necessary rules are defined at the highest level possible. This helps minimize the needed number of tax rules.

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Document Fiscal Classifications in Tax Rules

The document fiscal classification tax determination factors allow you to use the document fiscal classification in tax rules. A combination of the determination factor class, class qualifier, and determining factor represents these determination factors.

Use document as the determining factor class, the level of the transaction business category being used, level 1, level 2, level 3, level 4, or level 5 as the class qualifier, and the document fiscal classification as the determining factor.

The value you enter against the condition set is the document fiscal classification code or name set up for the specific level defined in the class qualifier, as well as for the same country or where the country is blank on the document fiscal classification.

Document Fiscal Classifications at Transaction Time

During transaction time, enter the document fiscal classification on the transaction to classify the transaction for tax determining and reporting purposes.

The document fiscal classification is stored in the tax reporting ledger and is available for reporting.

Document Fiscal Classifications: Example

The document fiscal classifications classify transactions for tax determination and reporting. Use this classification when the tax determination and reporting processes need the documentation associated with the transaction.

The following scenario illustrates how Intra-EU supplies are controlled through zero-rating of transactions. A zero-rating is given to a transaction only when the export documentation related to the transaction is received.

Scenario

When the export documentation isn't received in time, the customer is invoiced with the VAT that is applicable in the country of the supplier. The transaction is not zero-rated, which is the normal case for Intra-EU business-to-business supplies.

To model this scenario, create a document fiscal classification and attach it to a transaction only when you receive the documentation. If the document fiscal classification isn't attached to a transaction, the Intra-EU goods business-to-business supply rules aren't triggered and the applicable VAT is charged.

When the documentation is received after the invoice is generated, the invoice that is sent is credited and a new invoice is produced.

Create the following document fiscal classification:

Level	Fiscal Classification Code	Fiscal Classification Name	Country	Start Date
1	INTRA-EU DOCUMENTS	Sales Transaction		The earliest transaction date or start date of tax.
2	INTRA-EU EXPORT DOCUMENTATION	Intra-EU Export Documentation Received.		The earliest transaction date or start date of tax.

The tax rule that defines the conditions under which the Intra-EU supply of business-to-business goods are zero-rated includes a determining factor as shown in the following table:

Determining Factor Class	Class Qualifier	Determining Factor	Operator	Value
Document	Level 2	Document Fiscal Classification	Equal to	INTRA-EU EXPORT DOCUMENTATION

Tip: Specify the country name while creating transaction business categories. This ensures that a limited applicable list is presented while entering the document fiscal classification during transaction or tax rule creation.

Tip: In this classification and many other tax classifications, classify the nonstandard items of your business as standard items. This can be modeled as a default tax rule and therefore, doesn't require an explicit classification or an explicit rule. Classify only exception items and define specific tax rules for them. For a standard item, none of the explicit tax rules apply except the default rate.

Tax Exemptions: Explained

A tax exemption is a full or partial exclusion from taxes or a surcharge, based on certain criteria given by the tax legislation. Many countries allow tax exemptions when certain parties deal with certain categories of goods and services. For example, most states and localities imposing sales and use taxes in the United States provide tax exemptions to resellers on goods held for sale and ultimately sold. States and localities also provide tax exemptions on goods used directly in the production of other goods, such as raw materials.

Tax exemptions:

- Reflect a specific tax rate levy.

- Are taken as a percentage reduction or an increase to the generally applied tax rate.

- Can also be a specific tax rate in place of the generally applied tax rate on a Receivables transaction.

- Are registered against a customer or customer site for a business relationship with a legal entity or a business unit. Since tax exemptions are applicable to specific legal entities or business units, you don't use the global configuration owner option.

- Are used for specific products or available for all transactions for a legal entity or business unit.

Define tax exemptions for the combination of customer and customer site and items for a period of time. Use rate modifiers, such as discount or surcharge percentage or special rate percentage to map the preferential or special tax rate applicability.

The tax exemption status influences the applicability of the tax exemption on transactions. The possible values are: **Primary**, **Manual**, **Rejected**, **Unapproved**, and **Discontinued**. The tax exemptions with the status of **Primary** are applicable to all transactions. The tax determination process considers **Manual** or **Unapproved** statuses only when the certificate number and the exempt reason on the transaction match with the registered tax exemption values. The **Discontinued** or **Rejected** statuses aren't considered for tax exemption processing.

The tax handling option on a Receivable transaction also influences the tax exemption processing. If you use the tax handling option of:

Standard: The tax determination process considers only tax exemptions with a status of **Primary**

Exempt: The tax determination process considers all **Primary**, **Manual**, and **Unapproved** tax exemptions with reference to the certificate number and exempt reason given on the transaction.

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Exempt- manual: The tax determination process creates a new tax exemption along with the given certificate number and exempt reason, with 100% discount and with a status of **Unapproved** if the matching condition doesn't result in filtering any existing tax exemptions.

Tax Exemptions: Choices to Consider

A tax exemption applies to a specific customer or to a combination of customer and specific product. For example, in the United States, the Federal Government acting as a customer is exempt from tax on direct sales. Many states provide exemptions on sales of necessities such as food and clothing.

To set up tax exemptions for a third party, you must complete the appropriate tax exemption setup for the tax regimes and taxes concerned. Create a separate record for each tax exemption that applies to the third-party customer or customer site. The tax determination process applies the tax exemption to the transaction line based on the tax exemption setup and tax handling specified on the transaction line.

Tax Exemption Setup

Before you can create a tax exemption record, you must enable the tax exemption options at the appropriate levels:

- Set the **Tax Exemption Override Control** profile option. It controls the display of tax handling on the transaction line to apply and update customer tax exemptions to transactions.

- Set the **Allow tax exemptions** option at the levels that correspond to the tax exemption. For example, if the tax exemption refers to the tax status of a particular tax, then you must set this option at the tax regime, tax, and tax status levels.

- Set the **Allow exemptions** option in the configuration owner tax option for each event class for which calculation based on tax exemption is to be enabled. For the exemptions party basis select whether the bill-to party tax exemption records are to be considered or the sold-to party tax exemption records. In some cases the sold-to party could be different from the bill to party.

Tax Exemption Record

A tax exemption record identifies the nature of the tax exemption, the configuration owner, and tax regime, and, where applicable, the related tax, tax status, tax rate, and tax jurisdictions to which the tax exemption belongs.

During the life of a tax exemption, the tax exemption status can often change. The possible statuses are: **Primary**, **Manual**, **Unapproved**, **Discontinued**, and **Rejected**. Because the status of the tax exemption affects its applicability on the transaction line, you must update the tax exemption record each time the status changes. These rules apply to the status of the tax exemption:

- Tax exemptions with a status of **Primary** apply to all transactions of the customer or customer site.

- Tax exemptions with a status of **Manual** or **Unapproved** apply to specific transactions of the customer or customer site.

- Tax exemptions with a status of **Discontinued** or **Rejected** are not considered during tax calculation.

You also specify the method of calculating the tax exemption percentage on the tax exemption record:

- The **Discount or surcharge** type decreases or increases the original rate by the percentage you enter.

  If the discount is 15% off the standard rate and the standard rate is 10%, enter 85 as the tax exemption percentage. This defines a discount rate that is 85% of the original 10%, or 8.5%.

  If the surcharge is 10%, enter 110 as the tax exemption percentage. This defines a surcharge rate that is 110% of the original 10%, or 11%.

- The **Special rate** type replaces the original rate with the percentage you enter.

  Enter the special rate percentage that replaces the standard rate. If the original rate is 10%, and the special rate is 5%, enter 5 as the tax exemption percentage.

Tax Exemption Applied to the Transaction Line

You use the **Tax Handling** field on the transaction line to select the applicable tax exemption value. Tax exemptions are processed in different ways depending upon the value you select:

- **Require**: The customer is required to pay the tax. Tax exemptions do not apply to the transaction line, even if defined.

- **Exempt**: Enter the tax exemption certificate number and the customer tax exemption reason. Tax exemptions are processed in this way:

    a. Consider tax exemptions with a status of **Primary**, **Manual**, or **Unapproved**.
    b. Verify that the transaction date is within the tax exemption effective date range.
    c. Verify that the transaction tax exemption reason and tax exemption certificate number match the tax exemption reason and certificate number. If you do not enter a certificate number, the tax determination process still looks for a matching tax exemption.
    d. If the tax determination process doesn't find a tax exemption matching these conditions, it creates a tax exemption with the status **Unapproved** and 100% discount.

- **Standard**: This tax handling is for exemptions of the Primary status only. You do not have to enter the tax exemption certificate number or customer tax exemption reason.

  The tax determination process looks for a tax exemption with the Primary status and an effective date range that includes the transaction date. If more than one tax exemption applies, the most specific tax exemption is used, in this order:

    a. Customer and product tax exemption for tax rate and tax jurisdiction.
    b. Customer and product tax exemption for tax rate.
    c. Customer and product tax exemption for tax status and tax jurisdiction.
    d. Customer and product tax exemption for tax status.
    e. Customer and product tax exemption for tax.
    f. Customer only tax exemption for tax rate and tax jurisdiction.
    g. Customer only tax exemption for tax rate.
    h. Customer only tax exemption for tax status and tax jurisdiction.
    i. Customer only tax exemption for tax status.
    j. Customer only tax exemption for tax.

- **Exempt, manual**: You manually enter a certificate number and exemption reason. The application process creates a tax exemption with a status of **Unapproved** and a 100% discount is applied.

  ✎ **Note:** The application first checks the customer site party tax profile for the exemption records. If there is no exemption record defined within the site, then it checks the customer party tax profile.

After applying tax exemption to a transaction line, the tax determination process calculates the tax rate using the tax exemption type. The tax exemption type is defined in the tax exemption record. The sequence of the tax rate value determination is:

1. Determine the basic tax rate through the Determine Tax Rate rule type or by the default specified for the tax.
2. Apply exception which is based on the product.

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3. Apply tax exemption which is based on the party (customer) and its relationship with the transacting organization (legal entity or business unit). Optionally, it can be based on a specific product.

For example, the tax rate determined is 6%, the special rate for a tax exception is 5%, and the tax exemption defined is a 2% discount. The tax exemption discount is applicable to the tax rate after the tax exception. Therefore, the 5% tax rate is modified by a 2% discount (5% * (100%-2%) = 4.9%). If the tax exemption defined is of the rate type of **Special rate** then the special rate is substituted and the applicable tax exception has no impact.

For manual tax lines, no additional processing is performed and tax exemptions are not considered. A manual tax line suggests that you have specific business requirements for a particular transaction to apply a manual tax. No additional processing is performed for manual tax lines to avoid any applying conflicting or inconsistent values to the user-entered tax line. The tax calculation on a manual tax line is the standard formula of tax amount is equal to the taxable basis multiplied by the tax rate.

Related Topics
- Exemption Types and Percentages: Examples

Product Category Fiscal Classifications: Explained

Use product category fiscal classifications to classify items for tax determination and reporting purposes. Use product category fiscal classifications when Oracle Fusion Inventory is not available. However, you can use product category fiscal classifications in conjunction with product fiscal classifications when Inventory is installed.

Product category fiscal classifications use the classification functionality within Oracle Fusion Tax setup to directly define the classification to use. This functionality allows a hierarchy of up to five levels and uses the standard hierarchical features. It also allows you to associate the classification codes with specific countries.

✏️ **Note:** Leave the country blank on the classification codes if that code is applicable to multiple countries.

Product Category Fiscal Classifications in Tax Rules

The product category fiscal classification tax determination factors allow you to use product category fiscal classification in the tax rules. A combination of determination factor class, class qualifier, and determining factor represents these determination factors.

Use **Product noninventory linked** as the determining factor class, the level to be defined in the tax rule as the class qualifier, and product category as the determining factor.

For each of the fiscal classification codes created, you can associate a tax reporting code, which is associated with the fiscal classification code. This enables you to report on any transaction line that uses the product category fiscal classification code to which the reporting codes is associated. You can associate multiple reporting codes with a single product category fiscal classification code, which allows multiple reporting requirements to be modeled.

💡 **Tip:** Use reporting codes related to the key elements of the transaction in preference to reporting against the key elements. This indirect reporting allows grouping of results when the same reporting code is associated with multiple product category fiscal classification codes. It also helps in minimizing ongoing maintenance.

Product Category Fiscal Classifications at Transaction Time

The product category fiscal classification has a single default that is set up in the relevant country defaults and appears as the default on the transaction lines. However, during transaction time, you can enter any applicable alternative product category fiscal classification code on the transaction line.

This product category is stored in the tax reporting ledger and is available for reporting.

Related Topics

- Tax Rules: Explained

Product Category Fiscal Classifications: Example

Many tax regimes use product classification to control tax applicability as well as the rate to be applied.

This scenario illustrates how tax is determined and reported for newspapers, books, and periodicals in Luxemburg without configuring Oracle Fusion Inventory.

Scenario

In Luxemburg, transactions involving newspapers, books, and periodicals are invoiced with VAT at a reduced rating, currently 3 percent.

To model this specific requirement, use the product category fiscal classification and follow these steps:

1. Configure product category fiscal classification based on the following table:

Level	Code	Name	Country	Start Date
1	LUG01	Goods	Luxemburg	1-Jan-1970
2	LUG0100	Normal Rated Goods	Luxemburg	1-Jan-1970
2	LUG0101	Zero Rated Goods	Luxemburg	1-Jan-1970
2	LUG0102	Exempt Goods	Luxemburg	1-Jan-1970
2	LUG0103	Reduced Rate Goods	Luxemburg	1-Jan-1970
3	LUG0103-01	Reduced Rate 1 Goods	Luxemburg	1-Jan-1970
3	LUG0103-02	Reduced Rate 2 Goods	Luxemburg	1-Jan-1970
3	LUG0103-03	Reduced Rate 3 Goods	Luxemburg	1-Jan-1970
1	LUS01	Services	Luxemburg	1-Jan-1970
2	LUS0100	Normal Rated Services	Luxemburg	1-Jan-1970
2	LUS0101	Zero Rated Services	Luxemburg	1-Jan-1970
2	LUS0102	Exempt Services	Luxemburg	1-Jan-1970
2	LUS0103	Reduced Rate Services	Luxemburg	1-Jan-1970

Level	Code	Name	Country	Start Date
3	LUS0103-01	Reduced Rate 1 Services	Luxemburg	1-Jan-1970
3	LUS0103-02	Reduced Rate 2 Services	Luxemburg	1-Jan-1970
3	LUS0103-03	Reduced Rate 3 Services	Luxemburg	1-Jan-1970

> 💡 **Tip:** While using the product category fiscal classification, only classify the nonstandard items of your business. Handle standard items by using default tax rules. Thus, for a standard item, none of the explicit tax rules are applicable and the default rate applies. The standard items are included in the table only for completeness. Modeling these standard items using default tax rules may be sufficient.

> 💡 **Tip:** Don't add the explicit percentage to the naming or coding convention used for product category fiscal classification. When the rate changes, you change the rate period on the specific rate and you don't have to change classifications or associated tax rules.

2. Create the determining factor set which refers to this product category fiscal classification.

   Use **Product noninventory linked** as the determining factor class, the level to be defined in the rule as the class qualifier, and the product category as the determining factor as shown in the following table:

Determining Factor Class	Class Qualifier	Determining Factor Name
Product noninventory linked	Level 3	Product Category

3. Create the condition set that refers to this product category fiscal classification as shown in the following table:

Determining Factor Class	Class Qualifier	Determining Factor Name	Value
Product noninventory linked	Level 3	Product Category	Reduced Rate 1 Goods

4. Create the tax status rule based on the determining factor set and condition set with zero tax rate status as the result as shown in the following table:

Determining Factor Class	Class Qualifier	Determining Factor Name	Value	Result
Product noninventory linked	Level 3	Product Category	Reduced Rate 1 Goods	LU Reduced Rate 1 Status

Product-Based Fiscal Classifications: Overview

Many tax regimes define rules for specific products or types of products. This is done to stimulate or enhance trade in specific products or ensure that certain products or product types are excluded from taxes. To support these requirements, Oracle Fusion Tax provides features to allow items to be classified. They make extensive use of the Oracle Fusion Inventory catalog functionality. If you don't implement Inventory, you can use product category fiscal classifications as an alternative classification in Oracle Fusion Tax. Set up your product classifications using the Manage Product-Based Fiscal Classifications task.

For example, value-added tax (VAT) in the UK exempts children clothing and normal foods from Great Britain's (GB) VAT. It's also common that tax authorities vary the tax status of product types depending on how they're planned to be used. For example, a company purchases products that are subject to VAT. The use of these items isn't related to the company's sale of taxable supplies. Therefore, the company can't recover any VAT or can only partially recover VAT on those purchases.

There has also been a recent trend to introduce antifraud tax legislation for specific products so that they can be treated in a different way to prevent fraud. For example, the GB Missing Trader Intra Community antifraud legislation specifies that certain types of business-to-business domestic supplies of certain high value electronic products, such as mobile phones, computer equipment and accessories are reversed charged. For more information about GB Missing Trader Intra Community legislation, see Her Majesty's Revenue and Customs (HMRC) - Business Brief 10/06.

The following product classifications for tax purposes can be used within Oracle Fusion Tax and are summarized in the following table:

Product Classification	Description
Product fiscal classification types and codes	Use this classification to group items for tax determination and reporting purposes. This functionality uses the Oracle Fusion Inventory catalog and item functionality and therefore, you can only use it when this functionality is installed.
Product category fiscal classification codes	Use this classification where Inventory is not installed. It helps classify transaction lines for tax determination and reporting purposes.
Intended use fiscal classifications	Use this functionality for tax determination and reporting purposes. Use this classification where transaction lines need to be classified based on the intended use of the product defined on that item.

💡 **Tip:** When available, use the product fiscal classifications in preference to product categories. This is because the application automatically derives product fiscal classifications at transaction time based on the items defined on the transaction line and their relationship to the applicable catalog classification.

You can use product category fiscal classifications in conjunction with product fiscal classifications. This combination enables you to define two different determining factors at transaction time.

Related Topics

- Intended Use Fiscal Classifications: Explained

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Product Fiscal Classifications: Explained

Use product fiscal classifications to classify items for tax determination and reporting. Define a product group to use in tax product exemptions.

Define product fiscal classifications by associating them with an Oracle Fusion Inventory catalog, which in turn is used to group items using the standard Inventory functionality.

Set up the following options in the Inventory catalog:

- Don't select the **Enable hierarchies for categories** option.
- Select **Items at leaf level** in the **Catalog Content** field.
- Select the **Allow multiple item category assignments** option.
- Select the **Enable automatic assignment of categories** option.
- Select **None** in the **Source Catalog** field.
- Don't select a value in the **Sharing Control** field.

During transaction time, when the association with the catalog exists, the application automatically derives the default product fiscal classification code based on the items used on the transaction line. When no item is defined on the transaction line, you can manually enter the product fiscal classification on the transaction line during transaction time. Even the default product fiscal classification code is derived during the transaction time, it can be overridden if necessary. The overridden product fiscal classification code is used in the tax determination process.

While creating the product fiscal classification, use the number of levels to define the number of hierarchical levels to link the items to. Also, specify the number of the level of classification that is to be used in the tax rule setup. When creating the levels within the product fiscal classification, define the start position and number of characters for each level. During transaction time, this ensures that all items with the same values in the start position and the same number of characters are grouped into the same classification.

For example, set up the following code structure using the Inventory catalog for the country, Luxemburg:

Code	Name
LUG01	Goods
LUG0100	Normal Rated Goods
LUG0101	Zero Rated Goods
LUG0102	Exempt Goods
LUG0103	Reduced Rate Goods
LUG0103-01	Reduced Rate 1 Goods
LUG0103-02	Reduced Rate 2 Goods
LUG0103-03	Reduced Rate 3 Goods

Code	Name
LUS01	Services
LUS0100	Normal Rated Services
LUS0101	Zero Rated Services
LUS0102	Exempt Services
LUS0103	Reduced Rate Services
LUS0103-01	Reduced Rate 1 Services
LUS0103-02	Reduced Rate 2 Services
LUS0103-03	Reduced Rate 3 Services

The previous code structure is represented by three levels:

Level	Type Code	Type Name	Start Position	Number of Characters
1	LU Goods or Services	Luxemburg Goods or Service Level	1	5
2	LU Type of Goods or Services	Luxemburg Type of Goods or Service Level	1	7
3	LU Type of Reduced Rate	Luxemburg Type of Reduced Rate Goods or Service	1	10

Use the level two codes to link the items that need to be classified using Inventory catalog.

Use the product fiscal classification pages to define the tax regimes for which specific product fiscal classification are to be used. Also, define if the product fiscal classification is available to be used in the setup of tax product exceptions. To set up tax product exceptions, enable the **Use in Item Exceptions** option. You can only set up one product fiscal classification for a specific tax regime with the **Use in Item Exceptions** option enabled.

Adjust the number of levels by increasing the number of levels. It is not possible to decrease the number of levels once the record is stored. In addition, you need to attach tax regimes to every level that is used in the tax rules.

> 💡 **Tip:** While setting up the product fiscal classification, use different levels so that all of the necessary tax rules can be defined at the highest level possible. This minimizes the needed number of tax rules.

In the previous example, the tax rule can use the level 1 product fiscal classification to differentiate between goods and services.

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Product Fiscal Classifications in Tax Rules

The product fiscal classification tax determination factors allow you to use product fiscal classification in tax rules. A combination of determination factor class and determining factor represents these determination factors.

Use **Product inventory linked** as the determining factor class and the product fiscal classification type code or name as the determining factor. When creating the tax rule, the value is the name or description associated with the relevant level.

Product Fiscal Classifications at Transaction Time

When an item is defined on the transaction line, the application automatically derives the default product fiscal classification on the transaction line using the Inventory catalog. The primary Inventory category set is defined in the country defaults of the taxation country. You can override this default during transaction time. The overridden default is used in the tax determination process.

The product fiscal classification is stored in the tax reporting ledger and is available for reporting.

Related Topics

- Tax Rules: Explained

Product Fiscal Classifications: Example

Many tax regimes use product classification to control tax applicability as well as the tax rate to be applied. In value-added tax (VAT) regimes, the type of product being purchased can drive recoverability.

This scenario illustrates how tax is determined and reported for newspapers, books, and periodicals in Luxemburg.

Scenario

In Luxemburg, transactions involving newspapers, books, and periodicals are invoiced with VAT at a reduced rating (currently 3%).

To determine tax:

1. Configure the Oracle Inventory catalog functionality.
2. Create a catalog specifically for Luxemburg VAT with the name LU VAT PRODUCT CLASSIFICATION. To create the catalog, create class categories including Reduced Rate 1 Goods.

   This catalog is used for other classifications such as Reduced Rate, Exempt Rate, and Standard Rate. Link all of the items that are rated as Reduced Rate 1 Goods in Luxemburg to this class category. In this case, link any relevant newspapers, books, and periodicals to this class category.

   Introduce a coding structure. An example is shown in the following table:

Code	Name
LUG01	Goods
LUG0100	Normal Rated Goods
LUG0101	Zero Rated Goods
LUG0102	Exempt Goods

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Code	Name
LUG0103	Reduced Rate Goods
LUG0103-01	Reduced Rate 1 Goods
LUG0103-02	Reduced Rate 2 Goods
LUG0103-03	Reduced Rate 3 Goods
LUS01	Services
LUS0100	Normal Rated Services
LUS0101	Zero Rated Services
LUS0102	Exempt Services
LUS0103	Reduced Rate Services
LUS0103-01	Reduced Rate 1 Services
LUS0103-02	Reduced Rate 2 Services
LUS0103-03	Reduced Rate 3 Services

> **Tip:** While using the product fiscal classification, classify the nonstandard items of your business as standard items. You can model this as a default tax rule that doesn't require an explicit classification or an explicit rule. Classify only exception items and define specific tax rules for them. For a standard item, none of the explicit rules are applicable and the default rate applies.

> **Tip:** Don't add the explicit percentage to the naming or coding convention used for product fiscal classifications. When the rate changes, you change the rate period on the specific rate and you don't have to change classification or associated tax rules.

3. Create a product fiscal classification and link it with the catalog using the code LU VAT PRODUCT FISCAL CLASSIFICATION. In this scenario, only a single level is needed, although other levels may be needed to model nonstandard services or subclassifications of product types for reporting purposes. The following table represents this multiple level requirement:

Level	Type Code	Type Name	Start Position	Number of Characters
1	LU Goods or Services	Luxemburg Goods or Service Level	1	5
2	LU Type of Goods or Services	Luxemburg Type of Goods or Service Level	1	7

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Level	Type Code	Type Name	Start Position	Number of Characters
3	LU Type of Reduced Rate	Luxemburg Type of Reduced Rate Goods or Service	1	10

4. Create or amend the Luxemburg country default record and set the primary inventory category set to LU VAT PRODUCT FISCAL CLASSIFICATION.

5. Create the determining factor set and condition set which refer to the product fiscal classification.

   Use **Product inventory linked** as the determining factor class, the level to be defined in the rule as the class qualifier, and the specific LU product fiscal classification level as the determining factor as shown in the following table:

Determining Factor Class	Class Qualifier	Determining Factor Name
Product inventory linked		LU Type of Reduced Rate

6. Create the condition set that refers to the product category fiscal classification as shown in the following table:

Determining Factor Class	Class Qualifier	Determining Factor Name	Value
Product inventory linked		LU Type of Reduced Rate	Reduced Rate 1 Goods

7. Create the tax status rule based on the determining factor set and condition set with zero tax rate status as the result as shown in the following table:

Determining Factor Class	Class Qualifier	Determining Factor Name	Value	Result
Product inventory linked		LU Type of Reduced Rate	Reduced Rate 1 Goods	LU Reduced Rate 1 Status

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Glossary

assignment rule

A rule that assigns an orchestration process to fulfillment lines.

ATP

Abbreviation for available to promise.

attribute

The property of a sales order, order line, fulfillment line, or orchestration process. Customer and Ship-To Address are each an example of an attribute of a sales order. Quantity is an example of an attribute of an order line. Actual Start Date is an example of an attribute of an orchestration process. Jeopardy Score is an example of an attribute of a fulfillment line.

billing period

A unit of time that occurs during recurring billing. One month is an example of a billing period.

configured item

An item that includes one or more options. A desktop computer where you choose the hard drive, monitor, and mouse is an example of a configured item.

document fiscal classification

A classification used by a tax authority to categorize a document associated with a transaction for a tax.

drop shipment

A type of shipment where the shipper is not the seller. This shipper ships directly to the customer. The shipper for an internal drop shipment is another business unit. The shipper for an external drop shipment is an external supplier.

fulfillment line

A request to fulfill an item. A fulfillment line contains information about this request, such as customer, sales order number, item, quantity, scheduled ship date, actual ship date, shipping method, and so on. You can schedule a fulfillment line, reserve product for it, substitute an item for it, change the warehouse, change the shipping method, change the demand class, and so on.

fulfillment line exception

A condition that causes a delay for a fulfillment line. Past Due, In Jeopardy, Backordered, and On Hold are each an example of a fulfillment line exception.

fulfillment system

A system that resides downstream of Order Management Cloud that is responsible for fulfilling a sales order. For example, a fulfillment system is responsible for shipping the physical goods to the customer, such as shipping a laptop computer from a warehouse to a customer location.

fulfillment task

A type of task that Order Management Cloud performs to fulfill a sales order. Schedule and Ship are each an example of a fulfillment task. Order Management might use multiple orchestration process steps to complete a single fulfillment task.

global area

The region at the very top of the user interface that remains the same no matter which page you're on.

hold

A temporary stoppage of processing an order line or fulfillment line during order fulfillment.

intended use fiscal classification

A tax classification based on the purpose for which a product is used.

item

A product that resides in the Product master database. Order Management displays items in the Item column when you add an order line to a sales order. For example, items for a company that sells hardware might include nuts, bolts, and screws. Items for a company that sells computers might include hard drives, computer monitors, and desktop computers. Items for a wireless service provider might include service plans, international calling services, and instant messaging services. Items for an insurance company might include an item that applies for a period of time, such as fire insurance coverage.

jeopardy

Measures the level of risk that is associated with the delay of an orchestration process task as low, medium, or high.

jeopardy priority

A value that describes the level of risk that is associated with delaying a fulfillment task. Order Management displays a jeopardy priority value of Low, Medium, or High.

jeopardy score

A numeric ranking that indicates the severity of a delay in completing a fulfillment task

on hold

Indicates that a hold was not released.

orchestration process

A process that includes a sequence of steps. These steps process one or more fulfillment lines during order fulfillment. An orchestration process coordinates the orchestration of physical goods and activities in a single order, and it automates order orchestration across fulfillment systems. It contains the instructions that describe how to process an order, such as the steps and services to use, step dependencies, conditional branching, lead-time information, how to handle change orders, and the status values to use. It describes how to schedule, reserve, ship, return, and invoice a sales order.

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orchestration process step

A step of an orchestration process that specifies the task layer service that Order Management calls or the subprocess to start. Each step references a task type, task, and service. A step might also specify branching. A task includes one or more orchestration process steps.

order compensation

The process of modifying an order so that it accurately reflects the changes that have occurred to the order. For example, assume Order Management receives a change order that specifies to ship an item from a different warehouse. In this example, it adjusts the order so that this order uses the different warehouse, updates delivery dates so that these dates accurately reflect the time required to ship the item from the different warehouse, and so on.

order fulfillment

The part of the order management lifecycle that fulfills a sales order. Order fulfillment typically begins after the user submits a sales order in Order Management Cloud. Order Management schedules, ships, and bills a sales order during order fulfillment. Order Management communicates with a downstream fulfillment system during order fulfillment.

order header

The fields of a sales order that apply to the entire sales order, such as Customer, Contact, Purchase Order, Business Unit, and Sales Credits. For example, on the Create Order page, the fields that display above the Order Lines area constitutes the order header.

order transformation

The process of transforming a source order into the business objects that define a sales order. These business objects include the order, order lines, fulfillment lines, orchestration processes, and return fulfillment lines.

pause task

A task that temporarily stops an orchestration process from running so that it can wait for a condition to be met.

processing constraint

A rule that controls who can change a sales order, what can change in this sales order, and when the change can occur.

product category fiscal classification

A classification defined for a noninventory-based product category, that is used for tax determination or tax reporting purpose.

product fiscal classification

A classification used by a tax authority to categorize a product for a tax. There can be more than one classification by tax.

recurring billing

A type of billing where charges and quantities repeat over time. A monthly subscription to an online service is an example of a charge that repeats over time.

return order

A sales order that returns the items that Order Management cloud has shipped to a customer. It returns these items from the customer to your organization.

returnable order line

An order line that includes a returnable quantity that is greater than zero, that is not a return order line, and that includes a status of Closed.

returnable quantity

The quantity ordered in the original sales order for an item, minus the quantity of all prior returns for this item from this sales order.

sales order

A contractual document between a sales organization and their customer to deliver items. It might reference a customer purchase order.

scheduled process

A program that you run to process data and, in some cases, generate output as a report.

shipment set

A set of order lines that Order Management ships together as one group. All of these order lines ship and arrive on the same date, although they might be spread across more than one package, depending on packing requirements.

source order

An order that you create in Order Management before you click Submit, or an order that Order Management receives from a source system. Order Management transforms a source order to a sales order when you click Submit, or when you import it from a source system.

source system

System where the sales order was created. Order Management Cloud and an order capture system are each an example of a source system. A source system provides business application information to an Oracle application. Oracle can use this information to extract fulfillment data and planning data into data files.

sourcing rule

A specification of the means by which organizations can replenish items.

split fulfillment line

A supply chain technique that fulfills an order in a timely and efficient way. For example, assume a fulfillment line includes a quantity of 30 items, but the preferred warehouse, Warehouse A, only has 20 items in stock. Warehouse B has 15 items in stock. To avoid a delay, you can split the fulfillment line so that it gets the items it requires from both warehouses.

status condition

A rule that determines when a sales order or object reaches a status. The following rule is an example of a status condition: If the Schedule task status equals Scheduled, then set the orchestration process status to Scheduled.

substitution

Replacing one item with some other item in a sales order. For example, replacing an 80GB hard drive with a 100GB hard drive because there are no 80GB hard drives in inventory.

task type

A group of services that Order Management uses to perform a fulfillment task. It represents a common business function that Order Management uses so that it can process a sales order from the time that a user creates it to the time that Order Management sends this sales order to an order fulfillment system. Shipment is an example of a task type. It is a set of services that communicates with a shipping fulfillment system to ship the items that a fulfillment line references.

tax exemption

A full or partial exclusion from taxes within a given time period.

transaction business category

A business classification used to identify and categorize an external transaction into a tax transaction.

value-added tax (VAT)

An indirect tax on consumer expenditures that is collected on business transactions and imported goods. Value-added tax (VAT) is added to products at each stage of their production. If customers are registered for VAT and use the supplies for taxable business purposes, then they typically receive credit for the VAT that is paid.