

# Oracle

## SCM Cloud

### Using Shipping

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**Release 12**

This guide also applies to on-premises  
implementations

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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

- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
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# 1 Manage and Release Pick Waves

## Monitor Pick Waves Work Area

### Overview

In the Pick Waves work area, you can monitor the progress of a pick wave after it is created and released for picking. You can:

- Assess pending work from the list of open pick slips and picks
- Assess outstanding and completed work for today
- View and assess open picks by source subinventory
- Assess progress on outbound pick slips and pick waves
- Assess progress on shipment lines based on status
- Assess pending work from the list of requisition pick slips
- Assess pending work from the list of replenishment pick slips

To monitor pick waves, select **Navigator - Pick Waves**.

## FAQs for Pick Waves Work Area

### What's past due?

Past due refers to pick slips and picks that have a due date prior to today's date.

### How can I view picks and pick slips for a specific date?

Use the **Release Date** filter to view a list of pick waves that were generated on a specific date.

Use the **Due Date** filter on the Summary tab to view picks and pick slips due on a specific date.

## Create Pick Wave

### Overview

You can create a pick wave based on demand selection, fulfillment, and processing criteria. You can track pick waves in the work area using the wave number and other details.

You can:

- Specify a release rule, or alternatively enter demand selection, fulfillment, and processing criteria

- Release the pick wave immediately
- Add the pick wave to the release schedule

To create a pick wave, select **Navigator - Pick Waves**, and then click **Create Pick Wave**.

## Pick Wave: Explained

A pick wave is a batch of shipment lines that are pick released together based on certain business-related criteria.

Examples of when you might want to use pick waves include:

- Fulfilling a particular customer demand
- Optimizing transportation
- Fulfilling backorders to reduce delay in shipment

### Fulfilling a Particular Customer Demand

If your organization has customers who have specific quality demands, then you can create a pick wave to perform extra quality checks or follow special procedures during shipping.

### Optimizing Transportation

You can process a batch of shipment lines that are bound by common ship-to location, shipping method, and shipping priority in order to optimize transportation. If your organization has several customers in one location, then your organization can choose to collect all the shipment lines for those customers and ship them together through a common carrier. For example, if an organization has 10 customers in location B, then it can collect all shipment lines for location B and create a pick wave to ship them together using a common carrier, such as UPS truck service.

### Fulfilling Backorders to Reduce Delay in Shipment

If your organization chooses to fulfill backorders by putting them on a faster shipping schedule, then you can create a pick wave for all the backordered lines and ship them using a faster shipping method, such as Air.

## Release Rule: Explained

Release rules enable you to determine which order lines are considered for release and to select your processing criteria. Selecting a release rule is efficient when you frequently use the same criteria to group order lines for release.

Release rules provide the flexibility to:

- Schedule pick waves using the Schedule Pick Wave process
- Specify multiple release criteria in a single step
- Select processing criteria

### Scheduling Pick Waves Using the Schedule Pick Wave Process

Release rules enable you to schedule creation of pick waves to release shipment lines using the Scheduled Pick Wave page.

### Specifying Multiple Release Criteria

When you select a release rule, the criteria defined in the rule gets selected. This criteria determines which order lines to consider and how to process them.



## Selecting Processing Criteria

You can select and modify the processing criteria on the Options tab.

## Demand Selection: Points to Consider

Demand selection criteria impact the way lines are selected for picking. Before selecting demand selection criteria, consider:

- Your organization's preferred criteria based on details pertaining to sales order, requested and scheduled dates, and item
- Your organization's preferred criteria for order fulfillment and processing

## Sales Order, Requested and Scheduled Dates, and Item Details

Before selecting the sales order, requested and scheduled dates, and item details, you must plan how your organization will create a pick wave.

- Which subinventory will you use?

Your choice of subinventory will result in the selection of those order lines that are planned to be sourced from the specified subinventory. The source subinventory is specified for the order lines during the sales order creation stage.

- Which sales order will you select?

Determine if the shipment lines to be pick released are for a specific sales order.

- Which customer will you select?

Determine if the shipment lines to be pick released are for a specific customer.

- Which shipment set will you select?

If your organization groups order lines within a sales order to ship together based on customer specifications, then those sets of lines are shipped together in the same shipment. You can select the appropriate shipment set number from where the order lines will be selected.

- Which destination type will you select?

Determine if the shipment lines to be pick released are for a specific geography, zone, or ship-to location.

- What are the specified date ranges?

Determine the from and to scheduled ship dates and from and to requested ship dates.

- What item details will you specify?

Consider if you are creating a pick wave for a specific item. If yes, then specify the catalog and category name along with the item name and description.

## Shipping Details

The selected shipping method will enable selection of those order lines that are planned for shipping using the specified shipping method.

## Pick Wave Options: Points to Consider

Options criteria impact the way lines are fulfilled and processed. Before selecting the options criteria, consider:


- Fulfillment criteria
- Processing criteria

### Fulfillment Criteria

Before you select the fulfillment criteria, you must plan how your organization prefers lines to be fulfilled. :

- What pick-from subinventory and pick-from locator will you specify?

Consider your organization's usage of a specific subinventory and locator to pick material from.

 **Note:** This is an optional criteria.

- What staging subinventory and locator will you specify?

Consider your organization's usage of a specific subinventory and locator to deposit the picked material for staging.

### Processing Criteria

Before you select the processing criteria, you must consider your organization's preference for processing lines. :

- What release sequence rule will you specify?

Consider your organization's preference regarding the order in which lines are allocated during pick release.

- What pick slip grouping rule will you specify?

Consider your organization's preference regarding grouping of lines onto pick slips.

- What ship confirm rule will you specify?

Consider if your organization prefers shipments to be ship confirmed as part of pick release.

- Will you automatically confirm pick slips?

Consider if your organization prefers pick slips to be automatically confirmed during pick release.

- Will you create shipments?

Consider if your organization prefers shipments to be created during the pick release process.

- Which shipment creation criteria will you use?


Consider your organization's criteria for creating shipments--whether a shipment can be created across orders or must be created from within an order.

- Will you automatically pack shipments?

Consider if your organization prefers shipments to be automatically packed.

- Will you append existing shipments?

Consider if your organization prefers to append shipment lines to the existing shipments.

-  **Note:** Here are the prerequisites for appending shipment lines:
- The appending limit must be defined as a value other than Do Not Append on the Shipping Parameters page.
  - An organization must be specified.
  - Create shipments functionality must be enabled.
  - Shipment creation criteria must be defined as across orders.
  - Autoconfirm pick slips functionality must be disabled.

## FAQs for Creating Pick Waves

### What happens if I select prior reservations only?

Only the lines or portions of lines that were previously reserved are considered for pick release.

### What happens if I include assigned lines?

The shipment lines that are assigned to shipments are considered for inclusion during pick release.

### What happens if I add a pick wave to a release schedule?

You create the pick wave, however, the background process releases the lines. You will receive the pick wave number and can proceed to perform the next task at hand.

## Schedule Pick Wave

### Overview

You can schedule the creation of pick waves.

You can:

- Specify the release criteria for a pick wave
- Schedule how frequently you want pick waves to be created
- Specify whether the output should be printed, and determine the format and layout of the output
- Specify whether you want to be notified after a pick wave is created

To schedule pick waves, select **Navigator - Pick Waves**, and then click **Schedule Pick Wave**.

## FAQs for Scheduling Pick Waves

### How can I schedule pick waves for release?

Use the **Schedule Pick Wave** task to create and schedule pick waves to release shipment lines that meet certain criteria. The shipment lines are released in a controlled mode and on a regular basis.

Pick releasing of shipment lines that meet criteria specified in the release rule is automated.

## Monitor Pick Slips Work Area

### Overview

The Pick Slips work area provides a list of open pick slips. The default view shows the open pick slips of all types that are due today so that you can focus on the current day's pick slip work.

To access the Pick Slips work area, select **Navigators - Pick Slips**.

## FAQs for Pick Slips Work Area

### How can I confirm a pick slip from the Pick Slips Overview page?

To confirm a pick slip, either drill down from the pick slip number link or use the link in the **Tasks** pane.

You can pick outbound shipments, requisitions, and replenishment types of pick slips. You can also search for the pick slip you want to confirm by entering the pick slip number in the **Search** section of the **Regional** pane.

### How can I record serial numbers that are not in a range?

Go to the **Record Serial Numbers** option in the **Actions** menu to record serial numbers.

### How can I record multiple lot and serial numbers?

Go to the **Record Lot and Serial Numbers** option in the **Actions** menu to record multiple lots and serial numbers. Note that you can record lots and serial numbers if the item is both lot and serial controlled.

### What are the limitations on editing exceptions?

An exception can be edited only in the **Edit Pick** page. You can go to the **Edit** option from the **Actions** menu. However, you can only modify the exception reason and not create any new exception.

### How can I record more than one lot?

Go to the **Record Multiple Lots** option in the **Actions** menu to only record multiple lots. Note that you can record lots if the item is lot controlled but not serial controlled.

## How can I record serial numbers?

Go to the **Record Multiple Serial Numbers** option in the **Actions** menu to only record serial numbers. You can also go to **Details** to enter serial numbers. Note that you can record serial numbers if the item is serial controlled but not lot controlled.

## What is due date?

A due date is a derived date based on whether a line is assigned or not.

The table show how the due date is derived.

Pick	Shipment	Due Date
1234	A	Shipment A exists for the pick 1234. Hence the due date for the pick will be same as the shipment's initial ship date
1235	None (shipment does not exist)	Shipment does not exist for pick 1235. Hence the due date for the pick will be the same as the shipment line's scheduled ship date.

# Confirm Pick Slips

## Overview

You use the Confirm Pick Slips page to enter details of picked material and confirm a pick slip.

You can do the following as part of confirming a pick slip:

- Enter details of picked material
- View and modify details of picks on a pick slip
- Enter multiple lot and serial number for picked material, if required
- Enter the transaction date for each pick
- Evaluate pick slip discrepancies

To confirm a pick slip, select **Navigator - Pick Slips**, and then click **Confirm Pick Slips**.

## FAQs for Confirming Pick Slips

### What happens if I confirm a pick slip and navigate to ship confirm?

You can continue with processing the shipment and then ship confirming it as an integrated flow.



## 2 Process and Confirm Shipments

### Monitor Shipments Work Area

#### Overview

In the Shipments work area, you can view all shipments and unassigned shipment lines based on carrier, customer, sales order, and shipping priority.

You can:

- Filter your view based on due date and organization
- Drill down to view details and perform tasks such as pick release, ship confirm, and record shipping costs
- Log and resolve shipping exceptions

To monitor the Shipments work area, select **Navigators - Shipments**.

### Outstanding and Completed Shipments and Lines: Explained

In the Outstanding and Completed Work for Today region, the Shipments and Shipment Lines analytics provide a graphical and tabular view of shipments and lines by status. The analytics chart and table provide the ability to drill down to individual shipments or lines in a specific status.

The following analytics assist you in gaining a quick high-level yet critical overview of the daily status of outstanding and completed work for your organization:

- Shipments
- Shipment Lines

#### Shipments Analytics

The Shipments analytics chart provides a graphical view of shipments by shipment statuses: Open and Shipped. A Shipped status indicates the number of shipments in Confirmed and Closed status. The Shipments analytics chart displays data based on the following criteria:

- Percentage of open and shipped shipments due today
- Number of past due shipments that are open and shipped

#### Shipment Lines Analytics

The Shipment Lines analytics chart provides a graphical view of the number of shipment lines that are due today. Shipment lines that were due before the current date appear as past due. The Shipment Lines analytics chart enables you to view the shipment lines in the following five statuses: Ready to Release, Backordered, Released to Warehouse, Staged, and Shipped. Lines with a Shipped status include shipped lines, as well as interfaced lines.

#### Related Topics

- [What's past due?](#)

## FAQs for Shipment Work Area

### How can I add the Create Shipment task to my list of available tasks?

To add **Create Shipment** to your list of available tasks, go to the **Personalization** menu and set your preference accordingly. Adding the **Create Shipment** task enables you to create a shipment by manually entering shipment information and adding lines to the shipment.

### How can I view unassigned shipment lines summaries of all my organizations?

Select the **Unassigned Lines** option from the **Columns** list in the **View** menu.

### Can I view shipment summaries across all my organizations?

Yes. You can select **All Organizations** to view summary of shipments and shipment lines for all the accessible organizations.

## Manage Outbound Shipments

### Shipments: Explained

A shipment comprises a set of shipment lines, grouped by certain common shipping attributes, that are scheduled to be shipped to a customer's ship-to location on a specific date and time. You can include items from different sales orders in a shipment. You can either manually or automatically group shipment lines to create a shipment. The shipment lines are grouped by the mandatory default criteria: ship-from location and ship-to location. However, you may also include additional grouping criteria, such as customer, freight terms, FOB (Free on board), and shipping method.

A shipment can have the following three statuses:

- Open
- Confirmed
- Closed

### Open Shipments

A shipment is open until it is confirmed.

### Confirmed Shipments

A shipment is marked confirmed when it is ship confirmed, which means that all the lines in the shipment are loaded for shipping to the customer's ship-to location.

 **Note:** A confirmed shipment may be reopened.

### Closed Shipments

A shipment can be marked closed after it is confirmed. A closed shipment is the final stage the shipping process. A closed shipment indicates that the inventory and the order have been updated to reflect the shipping of items from the warehouse.

 **Note:** A closed shipment cannot be reopened.



## Editing Shipments: Explained

Editing shipments enable you to edit multiple shipments simultaneously, thereby optimizing time and cost.

When editing multiple shipments at once, consider how you will:

- Edit selected shipments
- Edit selected attributes

### Editing Selected Shipments

You can edit only the shipments that you select to edit on the Manage Shipments page.

### Editing Selected Attributes

You can edit only selected attributes for all the selected shipments. The updated value for the attribute will be the same for all the selected shipments.

## Packing Shipments: Explained

Packing shipments is the process of packing items into packing units for shipping to the customer.

Packing shipments provides the flexibility to:


- Manually pack
- Automatically pack

### Manually Pack Shipments

You can pack shipment lines manually by creating packing units and specifying the lines that are packed in each of the packing units. Packing can be done for items as well as packing units. You can pack items into a packing unit and also pack those packing units into another packing unit. For example, you can pack items into a box and many boxes onto a pallet.

### Automatically Pack Shipments

You can choose to automatically pack shipment lines into packing units by selecting the **Automatically Pack** option for the specific lines. The selected shipment lines are grouped by shared attributes, such as the ship-to location, and are then packed based on the preferred default packing configuration.

 **Note:** You can automatically pack a shipment that is open and has at least one shipment line assigned to it. You can automatically pack if packing configurations have been defined.

## Print Packing Slip Report: Explained

When you ship goods, you can print a packing slip report to follow those goods. The packing slip report lets you provide detailed information about a shipment to a customer, to another organization as a transfer, or to a supplier as a return.

The packing slip report follows the goods during transportation and contains details about the contents of a particular package, carton, pallet, or container for shipment. Before printing a packing slip report, you can define attributes specific to your shipment, such as packing slip status, transportation reason, shipment description, and so on.

### Related Topics

- [Viewing Report Output from Scheduled Processes: Procedure](#)


## Printing a Packing Slip Report as a Scheduled Process: Procedure

To print a packing slip report for a shipment as a scheduled process, perform the following steps:

1. In the Navigator, select **Scheduled Processes**, and then click **Schedule New Process**.
2. In the **Name** field, click the down arrow, and then click **Search**.
3. In the **Name** field, enter **Print Packing Slip Report**, and then click **Search**.
4. In the search results, select **Print Packing Slip Report** from the drop-down list, click **OK**, and then click **OK** again.
5. Select the process details specific to your shipment.
6. (Optional) To schedule the packing slip to print at a later date or frequency, click **Advanced**, and then click the **Schedule** tab to enter the criteria.
7. Click **Submit**.

## Print Shipping Documents for Return to Supplier Transactions: Critical Choices

You can select whether or not you want to print shipping documents for your return to supplier transactions. To print shipping documents for these transactions, select the **Print Shipping Documents for Returns to Suppliers** option on the Manage Receiving Parameters page.

 **Note:** The **Print Shipping Documents for Returns to Suppliers** option is a one time setup step for your organization. You do not set this up per transaction.

### Print Shipping Documents

If shipping documents are required, or if several people are involved in the process to ship the product back to the supplier then your organization may select the **Print Shipping Documents for Returns to Suppliers** option on the Manage Receiving Parameters page. For example, this can happen when your organization's customers return the item to your organization, and then you must return the items to the supplier. This is a one time setup step for your organization and it cannot be changed for individual transactions. The return to supplier transaction is then completed in two steps as follows:

1. Creation of the return to supplier transactions in Oracle Fusion Receiving.
2. Confirmation of the return to supplier shipment in Oracle Fusion Shipping. This leads to the closure of the shipment and creation of the shipping documents.

### Don't Print Shipping Documents

If shipping documents are not required, do not select the **Print Shipping Documents for Returns to Suppliers** option on the Manage Receiving Parameters page. Your return to supplier transaction is completed in one step and you do not have to confirm the shipment in Shipping.

# Return to Supplier Transactions with Shipping Documents: How They Are Processed

When you need to return items to the supplier, you may choose to print shipping documents for transporting the returned items back to the supplier. Returns may be needed when a customer rejects an item from their received shipment, a defect is found internally, and so forth. To print shipping documents for the return, follow the two-step return process and that starts in Oracle Fusion Receiving and continues through to Oracle Fusion Shipping.

## Settings That Affect Return to Supplier Transactions

To print shipping documents for your return to supplier transactions select the **Print Shipping Documents for Returns to Suppliers** option on the Manage Receiving Parameters page.

 **Note:** The **Print Shipping Documents for Returns to Suppliers** option is a one-time setup step for your organization. You do not set this up per transaction.

## How Return to Supplier Transactions Are Processed

Return to supplier transactions are processed in two steps:

1. Create the return to supplier transaction in Oracle Fusion Receiving.  
  
The receiving agent has an offline interaction with the supplier to obtain the return material authorization number for the return. Then, the receiving agent creates the return to supplier transaction by providing details such as the returned quantity and return material authorization (RMA) number. Finally, the receiving agent submits the transaction for processing and the transaction moves to Shipping.
2. Create and confirm the return to supplier shipments in Oracle Fusion Shipping.  
  
Shipping treats the items on the return to supplier transaction as a noninventory shipment and stages the items without creating a shipment. Noninventory shipments do not generate inventory transactions or affect on-hand balances. Therefore, the application skips actions such as backorder, cycle count, pick release, and record serials, since these actions are not applicable to noninventory shipments. The shipping manager searches for the return transactions, assigns the return to supplier lines to shipments, and performs ship confirm. Upon ship confirm, Shipping generates the shipping documents for the customer, and creates and sends the automatic shipment notices (ASNs) automatically to the supplier.

## Corrections to Return to Supplier Transactions With Shipping Documents

You can make corrections to return to supplier transactions. The corrections are reflected on shipping documents up until the returned products are shipped within the Shipping application. If you make corrections after the products are shipped, the changes are still accepted in Receiving. Receiving maintains automated interfaces with Oracle Fusion Payables, Oracle Fusion Cost Management, and Oracle Fusion Purchasing to share the corrected quantity information The table below explains when changes are allowed within the Shipping application based on the type of correction to the return to supplier transaction and the associated shipment status.

Action	Status of Shipment in Shipping	Shipping Response
The return to supplier transaction sends an update with an <b>increase</b> in quantity.	Shipped	An increase in the quantity is accepted at the end of shipping and a new delivery line is created.


Action	Status of Shipment in Shipping	Shipping Response
The return to supplier transaction sends an update with an <b>increase</b> in quantity.	Not shipped	Updates are accepted in Shipping.
The return to supplier transaction sends an update with an <b>increase</b> in quantity.	Partially shipped	Updates are accepted in Shipping for the unshipped lines. Updates for the lines already shipped are not accepted.
The return to supplier transaction sends an update with a <b>decrease</b> in quantity.	Shipped	No updates are accepted in Shipping.
The return to supplier transaction sends an update with a <b>decrease</b> in quantity.	Not shipped	Updates are accepted in Shipping.
The return to supplier transaction sends an update with a <b>decrease</b> in quantity.	Partially shipped	Updates are accepted in Shipping for the unshipped lines. Updates for the lines already shipped are not accepted.
The return to supplier transaction sends an update that reduces the quantity to <b>zero</b> .	Shipped	No updates are accepted in Shipping.
The return to supplier transaction sends an update that reduces the quantity to <b>zero</b> .	Not shipped	Shipping accepts the change, but setting the quantity to zero cancels the shipment in Shipping.
The return to supplier transaction sends an update that reduces the quantity to <b>zero</b> .	Partially shipped	Updates are accepted in Shipping for the unshipped lines. Other lines are not accepted because that part of shipment is canceled.
The return to supplier transaction makes further updates after setting the quantity to <b>zero</b> .	Canceled	You cannot make further updates to a transaction that is already canceled. You must create a new return to supplier transaction.

## Example

When your organization's customer initiates a return, they return the item to your organization. Your organization must then send the items back to the outsourced manufacturer or supplier. Therefore, instead of your customers returning the items directly to the suppliers, your customer's items are routed through your organization to your organization's suppliers. In this instance, you must create shipping documents for transporting the items back to the suppliers.

## Print Shipping Documents for Configured Items: Explained

You can print the details of the model and options selected for configured items on fulfillment documents. This is known as the sales order view. The system calls a service at the time of shipment confirmation that provides this information. You can view the details of the configured product on the packing slip and commercial invoice throughout the receiving, inventory, and shipping processes. This helps avoid confusion when shipping configured products because the contents of the shipment are indicated on the documents.

 **Note:** The quantities of the components contained in the configured item display on the documents in terms of a single unit quantity. This means that the documents show the number of required components when the configured item quantity equals one.

## Order Types: Explained

Order types are used to classify transactions.

Shipping order types include:

- Sales order
- Transfer order
- Return transfer order

### Sales Order

A sales order is the orchestration document representing the demand and supply for items. Sales order lines can be picked, packed, and shipped.

### Transfer Order

A transfer order is the orchestration document representing the demand and supply for an internal material transfer. Transfer order lines are similar to sales order lines. They can be picked, packed, and shipped.

### Return Transfer Order

A return transfer order is a transfer order for which a return transaction is initiated. The return is performed against the original transfer order. The price and tax for a return transfer order is derived in Oracle Fusion Receiving.

## Transfer Orders and Shipping Integration: How It Is Processed

Transfer order processing is integrated with Oracle Fusion Shipping. You can pick, pack, and ship transfer order lines in Shipping. You can also generate shipping documents for a transfer order.

### Settings That Affect Transfer Order and Shipping Integration

Supply chain orchestration rules affect transfer order processing when integrating with shipping. These rules determine if a transfer order is routed directly through Oracle Fusion Shipping, or through Oracle Fusion Order Management. Shippable transfer order lines are interfaced to shipping directly from the transfer order pages in Oracle Fusion Inventory Management.

### How Transfer Orders Are Processed Through Shipping

Oracle Fusion Shipping plays a key role in transfer order processing. The following parameters are important components of the transfer order and Shipping integration:

- Shipping can generate shipping documentation for transfer order lines.
- A transfer order line initially maps to one shipment line.
- Ship confirm updates the shipped quantity on transfer order lines.
- Shipping can accept a shipment line with internal locations for ship-to locations.

- Shipping validates the update of shipping-relevant attributes on transfer orders.
- Lines for return transfer orders are treated similar to the ones in the original transfer order, but are identified separately with an order type of return transfer order.
- Transfer orders that do not require physical return of material are not interfaced to Shipping.
- Shipping can generate transfer order shipping cost records to pass to Costing.

## Generating Shipping Costs for Transfer Orders: How They Are Processed

The Generate Shipping Cost process generates shipping cost records for shipping costs tied to a transfer order shipment.

### Settings That Affect Generating Shipping Costs for Transfer Orders

Shipping cost records are generated for all transfer orders.

### How Shipping Costs for Transfer Orders Are Processed

The Generate Shipping Cost process has the following requirements:

- Shipping costs at the shipment or container level are prorated down to the shipment line level so that summaries are provided by shipment line.

 **Note:** This applies to shipment header and container level charges only.

- Prorating calculations are performed using the weight for the given shipment line.

If no weight was entered for the lines being prorated, then the quantity is used to drive the prorating calculations.

 **Note:** This applies to shipment header and container level charges only.

- For shipping costs at the line level, the full charge associated with the delivery line is passed onto Costing.

 **Note:** This applies to delivery line level charges only.

- Records in the Shipping Costs table are summarized by shipment line and freight cost type.
- Shipping costs cannot be changed for transfer orders or return transfer orders after the shipment has been confirmed and interfaced to Inventory.
- Costs in the shipping cost table are picked up when the associated transfer order shipment inventory transaction is picked up by Costing.

## Shipping Cost Changes on Transfer Orders: Explained

You can change transfer order shipping costs on the Record Shipping Costs page, whether or not the shipment or shipment lines are open, confirmed, or closed. However, for delivery lines associated with transfer orders, you cannot make changes

to the shipping costs after a confirmed shipment is interfaced to inventory. You can still view shipping costs, but you cannot update them.

Access the Record Shipping Costs page from the Manage Shipments and Manage Shipment Lines pages to view, change, cancel, or record new shipping costs.

Oracle Fusion Shipping performs two validations on transfer order costs. They include:

- Protecting against duplicate freight costs

You cannot add a new shipping charge when the same shipping charge is currently in the freight cost table against the same delivery line.

- Disallowing changes after interfacing to Inventory

Shipping costs tied to a transfer order are passed to Inventory and onto Costing. Once the confirmed shipment lines are interfaced to Inventory, Costing is triggered to pick up these costs. You cannot change shipping costs after confirmed shipping lines have been interfaced to Inventory.

 **Note:** This restriction applies to delivery lines associated with transfer orders only.

## Oracle Social Network for Outbound Shipments: Explained

Social objects are records within a business application that are mapped into the Oracle Social Network.

With social networking, you can share an aspect of your application, such as outbound shipments, with everyone who plays a part in getting the job done. Oracle Social Network uses conversations, or online discussions, as the central point of collaboration. Conversations can include messages, replies, documents, and links. You can also mark messages to initiate a discussion among members.

Important aspects for outbound shipment social objects include:

- Outbound shipment attributes
- Outbound shipment conversations
- Requirements
- Authorized users

The Oracle Social Network is common to most Oracle applications. For details about the social network, see the Social Network chapter of the Oracle SCM Cloud: Using Common Features for Applications Cloud guide. Also, see the Oracle SCM Cloud: Using Oracle Social Network guide.


### Outbound Shipment Attributes

A social object exists for outbound shipments. You can share the outbound shipment social object and create conversations for outbound shipments on the Edit Shipment page.

Anyone on the Oracle Social Network can reference an outbound shipment that has been shared on the Oracle Social Network. However, you can only access the Edit Shipment user interface from the Oracle Social Network, and take further actions on a shipment, if you have the authorized privileges for the Edit Shipment page.

Here are the outbound shipment attributes available on the Oracle Social Network conversation:

- Shipment
- Shipping Method
- Waybill
- Initial Ship Date
- Planned Delivery Date
- Shipment Status
- Ship-From Organization
- Customer
- Ship-To Location

 **Note:** You can only view attributes for which you have authorized access.

You can enable or disable the display of individual attributes in the Setup and Maintenance work area.

## Outbound Shipment Conversations

Click the Social button on the Edit Shipment page to share the outbound shipment social object for the social network conversation. If the outbound shipment social object has already been shared, clicking this button enables you to access the related social discussion.

 **Note:** You can only access the Edit Shipment page if you have the authorized permissions.

## Requirements

The following requirements must have already been met to use the outbound shipment social object:

- Configure Oracle Social Network for Fusion Applications
- Enable the outbound shipment for Oracle Social Network tracking as a social object
- Set up the outbound shipment for manual sharing

## Authorized Users

Authorized users include:

- Warehouse manager
- Shipping manager
- Shipping agent

### *Related Topics*

- [Social Networking: Highlights](#)



## FAQs for Managing Outbound Shipments

### How can I record shipping costs?

Select the shipment for which you want to record costs and click **Record Shipping Costs**. You can create one or more shipping cost records for shipments, items, or packing units in the Record Shipping Costs page.

### How can I change ship options?

Use the **Change Ship Options** option from the **Actions** menu to change the ship options for the selected shipment.

### Why can't I change shipping costs on a transfer order?

You cannot make updates to shipping costs after a transfer order shipment has been confirmed and interfaced inventory.

### Can I print shipping documents for transfer order shipments?

Yes, you can print the pick slips and bill of lading for transfer order shipments. You cannot print the packing slip.

### How can I ship confirm a shipment?

Select the shipment on the Manage Shipments page or the Edit Shipment page and select the **Ship Confirm** option. However, you must select a ship confirm rule or specify ship confirm options, as well as resolve all error exceptions, before you can ship confirm the selected shipment. You must also record lot and serial numbers for items that have that requirement.

### Can I ship confirm a shipment before resolving all exceptions?

Yes. You can ship confirm a shipment without resolving information and warning exceptions. However, you cannot ship confirm a shipment without resolving error exceptions.

### How can I update a packing slip status?

Ship confirm a shipment on the Management Shipments page or on the Manage Shipment Lines page. By default, the packing slip status value is the ship confirm rule associated with that shipment.

Alternatively, you can select the **Change Ship Confirm Options** action to change the packing slip status for a shipment. Packing slip status values are:

- Final. The default value when the **Close shipment** check box is selected for the ship confirm.
- Draft. The default value when the **Close shipment** check box is not selected for the ship confirm.

If a shipment is not closed, you can also update a packing slip status when you print a packing slip report. Use the scheduled process **Print Packing Slip Report** on the Scheduled Processes Overview page. You can print (or reprint) immediately or schedule a future print date.

### What's a return to supplier transaction?

A transaction that allows you to return items to a supplier and receive credit for the items without interacting directly with the supplier. The return is routed through the organization to the outsourced manufacturer or supplier. The organization sends the items back to the supplier.

### What's a noninventory shipment?

A shipment transaction created in Closed status for material that is not physically delivered into inventory in the warehouse. Noninventory shipments are used for return to supplier transactions to print shipping documents for the supplier and send

advance shipment notices (ASNs) to the customer. The shipping process for return to supplier transactions does not generate inventory transactions or affect on-hand balances.

## What are tax determinants?

Explicitly or implicitly available details on transactions such as receipt, ship confirm, and consumption that become inputs into the tax determination process. The tax determination process calculates the applicable taxes on the transaction. Examples of tax determinants are **Taxation County**, **Product Fiscal Classification**, and **Tax Classification Code**.

## Why can't I edit the tax determinants?

You must provide a value for the **Taxation Country** attribute before you can edit the following fields:

- **Transaction Business Category**
- **Document Fiscal Classification**
- **User-Defined Fiscal Classification**
- **Product Fiscal Classification**
- **Intended Use**
- **Product Category**

Also, some shipment and receiving lines don't show tax determinants due to their line status.

# Review Shipping Exceptions

## Shipping Exceptions: Explained

Shipping exception is an unexpected event resulting out of a conflict between the requirements of the shipper, customer, or transportation carrier.

Shipping exception enables you to:

- Define and maintain the three types of shipping exceptions
- View and modify predefined exceptions
- Modify severity levels of exceptions

## Define and Maintain New Shipping Exceptions

You can define and maintain new exceptions. The exceptions can be of three types:

- **Shipment:** exceptions that are logged against shipments.
- **Picking:** exceptions that are logged during the picking process.
- **Batch:** exceptions logged to store the messages generated during the automated shipping processes such as automatically pack and ship confirm.

## View and Modify Predefined Exceptions

You can view and use predefined exceptions. You can choose to activate or inactivate predefined exceptions based on their validity for your organization. You can only modify the severity level for predefined exceptions.

## Modify Severity Levels of Exceptions

You can define and maintain the following severity levels of shipping exceptions:

- Error: Requires resolution before the transaction can be closed.
- Warning: Can be superseded and does not require resolution to close the transaction.
- Information: Provides information on a particular transaction. The user is not required to act on the information exception to close the transaction.

### *Related Topics*

- [Predefined Exceptions: Explained](#)

## FAQs for Shipping Exceptions

### How can I resolve a shipping exception?

Select and view details of the exception you want to resolve. Use the **Closed** option from the **Status** drop-down list and save to resolve the exception. You may need to correct the cause of the error before closing the exception.

### How can I log a shipping exception?

Select **Create Exception Record** from the **Actions** menu to log an exception for a shipment or items within a shipment.



## 3 Integrate with External Systems

### Manually Interface Shipment Lines to External Systems: Explained

You can manually specify criteria to interface shipment lines to external systems. This enables you to reserve material and send shipment requests while bypassing the regular processing steps.

Use the Create Outbound Shipment Request page (accessed from the Shipments work area and Pick Waves work area) to specify the criteria to interface shipment lines with an external system. To initiate the shipment request, select either a shipment line or pick wave release rule, or enter a sales order.

### External System Shipping Integration Processes: Explained

You can communicate requests to ship orders to execution partners.

Use the following processes to interface with external systems:

- Generate Shipment Requests
- Perform Shipping Transactions
- Confirm Shipment Process

#### Generate Shipment Request

Use this process to schedule sending the shipment lines to external systems. This is a manual process to reserve material and send shipment requests. This process skips the regular processing steps and handles regular organizations, as well as those that are controlled by external systems.

#### Perform Shipping Transactions

This process handles the shipment confirmation interface records. It processes the pending transaction records received into the open interface from both regular and externally controlled organizations.

The Perform Shipping Transactions process validates the data on the transaction records before processing them. It records any errors from the validation step and leaves the transaction records in the open interfaces. You can view, edit, resolve errors, and reprocess the interface records with errors.

#### Confirm Shipment Process

This process confirms the shipment, prints shipping documents, sends the shipment advice, and initiates the inventory update process.

## External System Shipping Integration Statuses: Explained

Use external system shipping integration statuses to search for externally controlled shipment lines in a specific status. These statuses are helpful when integrating with external systems, such as is the case when interfacing with contract manufacturing.

External system shipping integration statuses available from the Shipments work area and Pick Waves work area include:

- Lines ready to interface
- Interfaced lines awaiting ship confirm
- Lines with interface errors

External system shipping integration statuses available from the Edit Shipment, Edit Shipment Line, and Manage Shipment pages include:

- Ready to interface
- Interfaced
- Confirmed

 **Note:** The integration status is not available by default. Select the integration status field from the **View** menu.

## FAQs for External System Integration

### How can I review and resolve interface record errors for shipment transactions?

Use the Manage Shipping Corrections in Spreadsheet task to manage pending transactions and transactions with processing errors. Access this task from both the Shipments work area and the Pick Waves work area. This task uses a spreadsheet interface to enable you to review and edit interface transactions and their corresponding errors related to the shipping transactions received from external systems.

### What's an execution partner?

An external company that provides execution services like a logistics service provider or contract manufacturer.

# 4 Reserve Inventory

## FAQs for Reservations and Picks

### What's a reservation?

A reservation links a supply source (such as on-hand inventory or a purchase order) to a demand source (such as an account, cycle count, or user-defined demand source), and guarantees allotment of material to the demand source. You can reserve material at the subinventory, locator, and if applicable, lot and serial number level.

### What's a pick?

A pick is a manually- or automatically-created suggestion to honor a reservation when on-hand inventory is available. Picks can be created for material at the subinventory, locator, lot and serial number levels.

### What's a cycle count reservation?

A cycle count reservation is a reservation with the demand document type of cycle count.

You can create a cycle count reservation if, during picking or shipping, you have determined missing material and you want to ensure that no one else tries to use or pick the missing material. Cycle count reservations are deleted when you perform a cycle count of the item in the specified location.

### What happens to reservations when I make changes to supply sources?

Reservations against the following supply sources are changed accordingly:

- On hand: After on-hand supply has been issued against a specified demand, the same material cannot be issued against another demand.
- Purchase order: If you reduce the quantity of material in or cancel a purchase order that is reserved against a demand, the corresponding reservation is modified or canceled.

Any other changes to the purchase order that affect the expected quantity also trigger changes to the associated reservation.

- Requisition: If you reduce the quantity of material in or cancel a requisition that is reserved against a demand, the corresponding reservation is modified or canceled.

Any other changes to the purchase order that affect the expected quantity also trigger changes to the associated reservation.

- Transfer order: If you reduce the quantity of material in or cancel a transfer order that is reserved against a demand, the corresponding reservation is modified or canceled.

Any other changes to the purchase order that affect the expected quantity also trigger changes to the associated reservation.

- Transfer order return: If you cancel a transfer order return that is reserved against a demand, the corresponding reservation is canceled.
- Work order: If you reduce the quantity of material in or cancel a work order that is reserved against a demand, the corresponding reservation is modified or canceled.

Any other changes to the purchase order that affect the expected quantity also trigger changes to the associated reservation.



# 5 Analyze Materials Management and Logistics

## Monitor Warehouse Operations Dashboard

### Warehouse Operations Key Performance Indicators: Explained

Key performance indicators (KPIs) measure how well an organization or individual performs an operational, tactical, or strategic activity that is critical for the current and future success of the organization.

The Warehouse Operations Dashboard contains the following KPIs:

- Inventory Value
- Hit or Miss Accuracy
- Exact Matches Rate

#### Inventory Value

The Inventory Value KPI shows the total value of inventory owned by your organization. The KPI indicates whether the material is physically available in the warehouse or if the material is in transit. The KPI report enables you to compare the inventory value for a selected time period with the prior year's inventory value for that same time period. You can also compare inventory value by inventory categories.

#### Hit or Miss Accuracy

The Hit or Miss Accuracy KPI shows the percentage of the cycle count that falls within the hit and miss tolerances of a total cycle count. This KPI provides the rate of hits during the cycle counting process. The KPI report enables you to compare the hit or miss accuracy for a selected time period with the prior year's hit or miss accuracy for that same time period.

#### Exact Matches Rate

The Exact Matches Rate KPI shows the exact match entries as a percentage of the total cycle count entries. An exact match entry is an entry where the counted quantity entered is the same as the system quantity. The rate of exact match entries obtained during the cycle count is called Exact Matches Rate. The KPI report enables you to compare the exact matches rate for a selected time period with the prior year's exact matches rate for that same time period.

### Warehouse Activity Dashboard Calculations: Explained

The Warehouse Activity Dashboard provides a summary of the most critical operations within the warehouse. You can launch into specific work areas to further drill down to get a better understanding of the issues and take corrective actions.

The dashboard shows completed and not completed values for:

- Outbound shipments
- Pick slips
- Inbound shipments

- Cycle count sequences to record

## Outbound Shipments

Outbound shipment totals include:

- Past Due, Not Completed: Includes all shipments that were due to ship prior to today, and still haven't shipped.

For example, this includes all shipments with initial ship dates of yesterday and prior, but that aren't in a Closed status. Shipments that are in a Confirmed status are counted towards the completed total.

- Past Due, Completed Today: Includes all shipments that were due to ship prior to today, and that have shipped today.

For example, this includes all shipments that were set to a Confirmed or Closed status today and had an initial ship date prior to today.

- Due Today, Not Completed: Includes all shipments that are due to ship today, and that haven't yet closed.
- Completed Today: Includes all shipments that have shipped today.

For example, this includes all shipments that were set to Confirmed or Closed status today. This doesn't include past due shipments that were completed today.

## Pick Slips

Pick slip totals include:

- Due Today, Not Completed: Includes all pick slips due to be confirmed today, and that aren't yet confirmed.

For example, all the pick slips that are open today and whose activities are due today (pick slip status equals Open and the activities due date equals **Today**).

For example, for a given date of X, this column reflects all pick slips with a due date of X and a status of Open.

The count in the column equals the sum of all open pick slips (outbound + replenishment + requisition) for the due date value of **Today** in the Pick Slips work area.

- Completed Today: Includes all pick slips confirmed today.

## Inbound Shipments

Inbound shipment totals include:

- Past Due, Not Completed: Includes all expected shipment lines due to be received prior to today, and that aren't yet received.

This is the sum of all expected shipment lines for the due date value of **All Past Due** in the Receipts work area.

- Past Due, Completed Today: Includes all expected shipment lines due to be received prior to today, and that were received today.
- Due Today, Not Completed: Includes all expected shipment lines due to be received today, and that weren't yet received.

These lines reflect the sum of all expected shipment lines for the due date value of **Today** in the Receipts work area.

- Completed Today: Includes all expected shipment lines received today.

This doesn't include past due shipments that were completed today.

## Cycle Count Sequences to Record

Cycle count sequences to record include:

- Due Today, Not Completed: Includes all pending count sequences with a status of Open.

This is the sum of all unique items pending for count (both serialized and nonserialized) in the Counts work area.

- Completed Today: Includes all count sequences that are counted and have a count date of today.

A link is not available from this number.

## Inventory Value KPI: How It Is Calculated

The Inventory Value key performance indicator (KPI) displays the total value of inventory owned by your organization. The KPI report presents an hierarchical view of sequential and year ago inventory value comparisons. The application calculates inventory value as a product of item quantity and cost. You can filter the report by year, organization, and inventory category.

You can access the Inventory Value KPI from the Warehouse Operations Dashboard.

### Settings That Affect the Inventory Value KPI

You can filter the Inventory Value KPI using the criteria described in the following table:

Filter Criteria	Description
<b>Year</b>	Select a year value for comparison.
<b>Currency</b>	Select a currency for the KPI report.
<b>Inventory Category</b>	Select a specific inventory category or select .
<b>Organization</b>	Select the organization for the KPI report.
<b>Period</b>	Select the time period that you want to appear in the KPI figure for year ago comparison. For example, 2010 Q1.

For the selected time period, the Inventory Value KPI figure shows the total inventory value compared to the same time period for the prior year. For example, if you select 2011 Q1 for the **Period** field, the KPI figure displays the bars described in the following table:

Figure Bar	Description
<b>Current Total Inventory Value</b>	Displays inventory value for the current period (for this example, Q1 2011).
<b>Total Inventory Value One Year Ago</b>	Displays results for Q1 2010.

The figure shows the values for each of your selected inventory categories.

## How the Inventory Value KPI Is Calculated

The Inventory Value KPI supports the calculations described in the following table.

Table Heading	Calculation
<b>On-Hand Value</b>	Material that is physically available in the warehouse. The application calculates the on-hand value by multiplying the on-hand item quantity and the cost.
<b>In-Transit Value</b>	Material that is in transit. The application calculates the in-transit value by multiplying the in-transit item quantity and the cost.
<b>Total Value</b>	Sum of the on-hand value and in-transit value.
<b>Percentage Change in Total Value from One Year Ago</b>	Percent of total value change between the selected year and the prior year.
<b>Percentage of Total Value</b>	Total inventory value for a category as a percentage of the total inventory across all categories.

### Example 1

Scenario: Your organization has 3300 notebook computers at a cost of 600 USD each in 2011. For the year 2010, your organization has 2970 notebook computers at a cost of 700 USD.

Year	Notebook Computers	Cost per Computer USD	Total Inventory Value USD
2011	3300	600	1,980,000
2010	2970	700	2,079,000

Calculation: Percentage Change in Total Value from One Year Ago:  $[(2079000-1980000)/2079000]*100=4.76$  percent.

Result: The total change from one year ago is 4.76 percent.

### Example 2

Scenario: The value of desktop computers, notebook computers, handheld devices, and monitors in your organization is 12100 USD, 3300 USD, 720 USD, and 88 USD respectively.

Item	Value USD
Desktop Computers	12100
Notebook Computers	3300
Handheld Devices	720
Monitors	88

Item	Value USD
Total Inventory Value	16208

Calculation: Percent of total value for desktop computers:  $(12100/16208)*100=75$  percent.

Result: The percent of total value for desktop computers is 75 percent.

## Hit or Miss Accuracy KPI: How It Is Calculated

The Hit or Miss Accuracy key performance indicator (KPI) displays the percentage of the cycle count that falls within the hit and miss tolerances of a total cycle count. This KPI provides the rate of hits during the cycle counting process. An entry is termed as a hit if the discrepancy between the entered and system quantities falls within the specified tolerance limits.


### Settings That Affect the Hit or Miss Accuracy KPI

You can filter the Hit or Miss Accuracy KPI on the following criteria:

- **Year:** Select a year value for comparison.
- **Organization:** Select the organization for the KPI report.
- **Period:** Select the time period that you want to appear in the KPI figure for year ago comparison. For example, **2011 Q1**.

### How the Hit or Miss Accuracy KPI Is Calculated

There are several calculations involved with the Hit or Miss Accuracy KPI table.

Table Heading	Calculation
<b>Total Entries</b>	The total count of cycle count entries in the specified period.
<b>Total Hit Entries</b>	An entry is termed as a hit if the discrepancy between the entered and system quantities falls within the specified tolerance limits.
 <b>Note:</b> The total number of hit entries is not shown in the KPI table.	
<b>Hit or Miss Accuracy Percentage</b>	Accuracy level of an organization's inventory. The value is calculated as a percentage of the total hit entries to the total number of entries $(\text{Total Hit Entries}/\text{Total Number of Entries}) * 100$ . For example, if you have 110 hit entries and 112 total entries, the Hit or Miss Accuracy is 98%.  <b>Hit or Miss Accuracy Percentage:</b> $(110/112)*100=98\%$
<b>Percentage Change from One Year Ago</b>	Percent of hit or miss accuracy change between the selected year and the prior year. For example, if your organization had a hit or miss accuracy of 99.9% in 2011 and 98.9% in 2010, the total change from a year ago is 1%.  <b>Percentage Change from One Year Ago:</b> $[(99.9-98.9)/99.9]*100 = 1\%$

For the selected time period, the Hit or Miss KPI figure shows the hit or miss accuracy percent compared with the same time period for the prior year. For example, if you select **2011 Q1** for the **Period** field, the figure displays the following bars:

- **Hit or Miss Accuracy:** Displays results for Q1 2011.
- **Hit or Miss Accuracy One Year Ago:** Displays results for Q1 2010.

## Exact Matches Rate KPI: How It Is Calculated

The Exact Matches Rate key performance indicator (KPI) shows the exact match entries as a percentage of the total cycle count entries. An exact match entry is an entry where the counted quantity entered is the same as the system quantity. The rate of exact match entries obtained during the cycle count is called Exact Matches Rate.


### Settings That Affect the Exact Matches KPI

You can filter the Exact Matches Rate KPI on the following criteria:

- **Year:** Select a year value for comparison.
- **Organization:** Select the organization for the KPI report.
- **Period:** Select the time period that you want to appear in the KPI figure for year ago comparison. For example, **2011 Q1**.

### How the Exact Matches KPI Is Calculated

There are several calculations involved with the Exact Matches Rate KPI table.

Table Headings	Calculations
<b>Total Entries</b>	The total count of cycle count entries in the specified period.
<b>Total Match Entries</b>	The total count of exact match entries in the specified period. An exact match entry is an entry where the counted quantity entered is the same as the system quantity.
	 <b>Note:</b> This value does not appear in the KPI table.
<b>Exact Matches Rate Percentage</b>	Accuracy level of an organization's inventory. The value is calculated as a percentage of the total match entries to the total number of entries (Total Match Entries/Total Number of Entries)*100. For example, if you have 110 match entries and 112 total entries, the exact matches rate is 98%.  <b>Exact Matches Rate:</b> $(110/112)*100=98\%$
<b>Percentage Change from One Year Ago</b>	Percent of exact match rate change between the selected year and the prior year. For example, if your organization had an exact matches rate of 99.9% in 2011 and 98.9% in 2010, the total change from a year ago is 1%.  <b>Percentage Change from One Year Ago:</b> $[(99.9-98.9)/99.9]*100=1\%$ .

For the selected time period, the Exact Matches KPI figure shows the exact matches rate percent compared with that same time period for the prior year. For example, if you select **2011 Q1** for the **Period** field, the figure displays the following bars:

- **Exact Matches Rate:** Displays results for Q1 2011.
- **Exact Matches Rate One Year Ago:** Displays results for Q1 2010.

## FAQs for Warehouse Operation Dashboard

### What's the difference between inbound shipments and outbound shipments?

Inbound shipments are items that you receive into the warehouse. Oracle Fusion Receiving supports the receipt of purchase orders, purchase requisitions, return material authorizations, and interorganization shipments.

Outbound shipments are items that you ship out of the warehouse. Oracle Fusion Shipping automates and helps manage outbound shipments.





# Glossary

## **pick wave**

A batch of shipment lines that are pick released together based on certain business-related criteria.

