



Enhance Your OTC Processes with Oracle Order Management Cloud

Presented By: Erika

Date: 08/01/2019

Who Is NexInfo?

SUMMARY

- Consulting company focused on helping clients achieve Operational Excellence via an optimal blend of Business Process & Software consulting services
- Deep domain expertise, including: Integrated Business Planning (IBP/S&OP), Enterprise Resource Planning (ERP), Product Lifecycle Management (PLM), Customer Relationship Management (CRM), Enterprise Planning Management (EPM), Human Capital Management (HCM), Predictive Data Analytics, Security, & Business Transformations
- Founded in 1999 and managed by computer industry & business process professionals
- Clients include emerging companies and Fortune 1000 corporations
- Recognized in the industry, including features in Gartner Reports, The Silicon Review (50 Smartest Companies of the Year 2016 and 10 Fastest Growing Oracle Solution Providers 2017), and CIO Review (100 Most Promising Oracle Solution Providers 2015)

PARTNERS



CORPORATE INFO

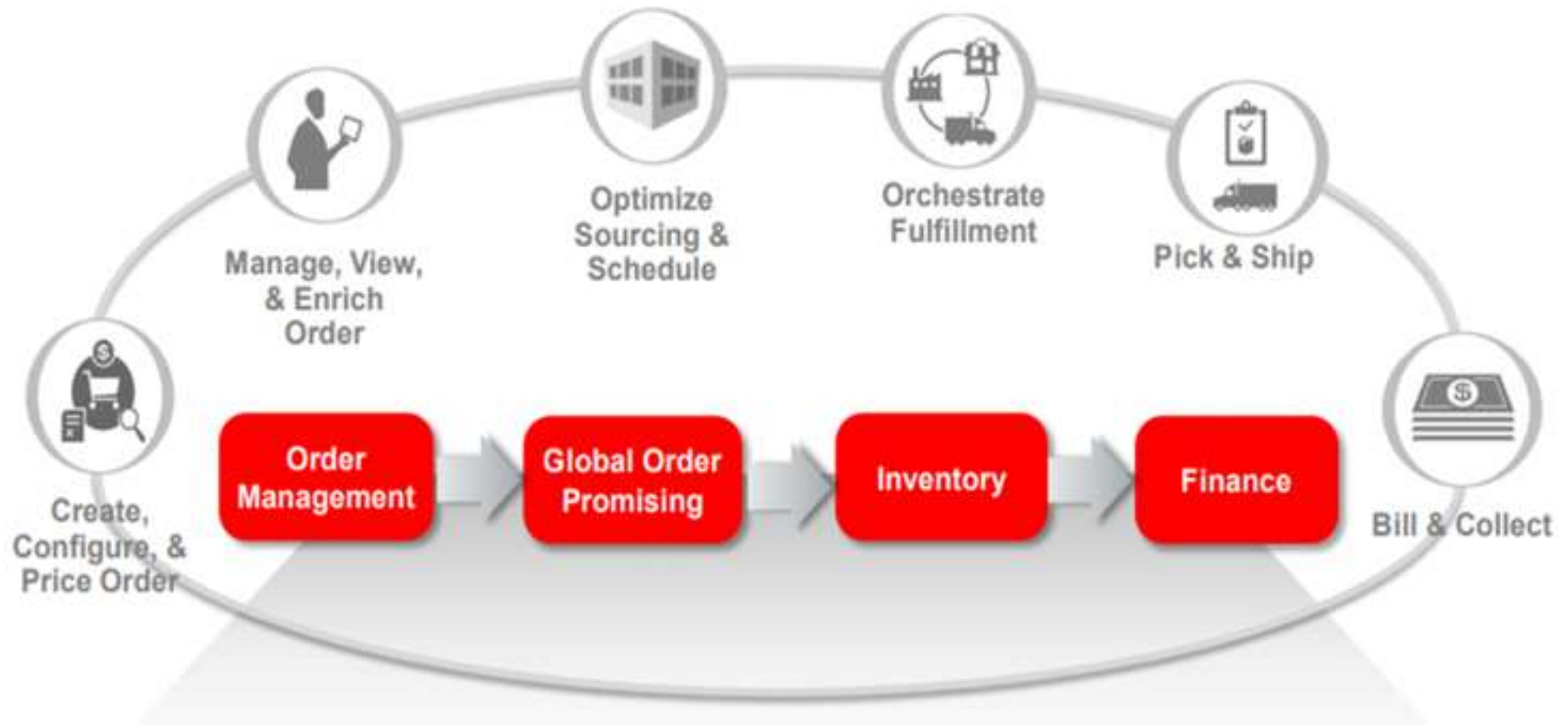
- HQ in Orange County, CA with offices in Redmond, WA, Chicago, IL, Bridgewater, NJ, Dublin, Ireland, Chennai, Delhi & Bangalore, India.
- Operations across the United States, Europe (Ireland, UK, Switzerland, Belgium) & India



Agenda

- Order-to-Cash flow overview
- Order-Order-to-Cash Functional Steps
- Role of Order Management Cloud in the Order-to-Cash Flow
- Order Management Cloud Integrations
- Order Management Cloud Architecture
- Order Entry
- Pricing
- Order Orchestration
- Global Order Promising
- Import Orders
- Transformation Process
- Shipping Process

Order to cash flow overview



Order-to-Cash Functional Steps

Capture

Enter customer, select products, configure products, price, sales credit, check supply, tax, validate, submit, revise, return

Fulfill

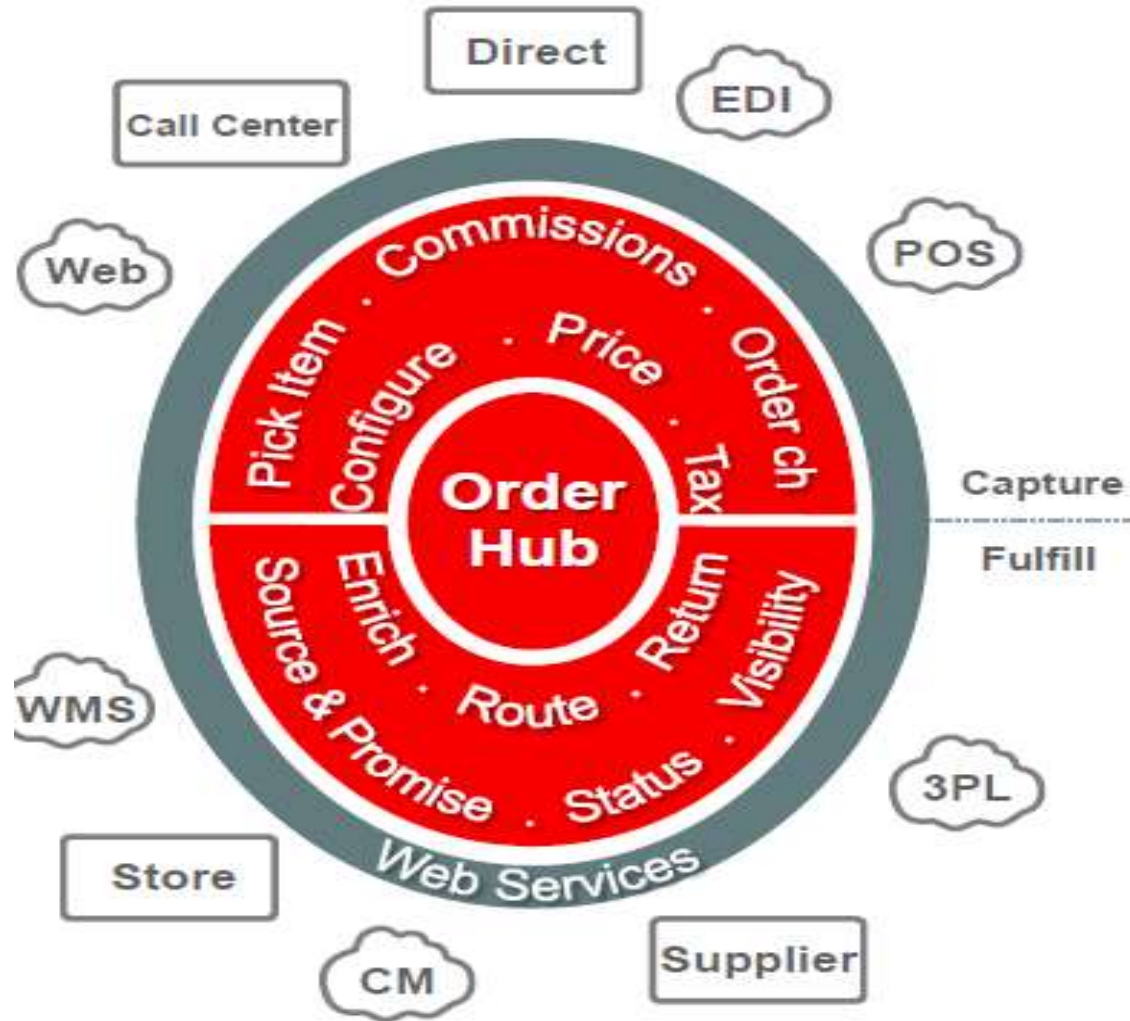
Enrich
Schedule
Reserve
Ship
Drop ship
Back-to-back
Configure-to-order
Internal transfer

Cash

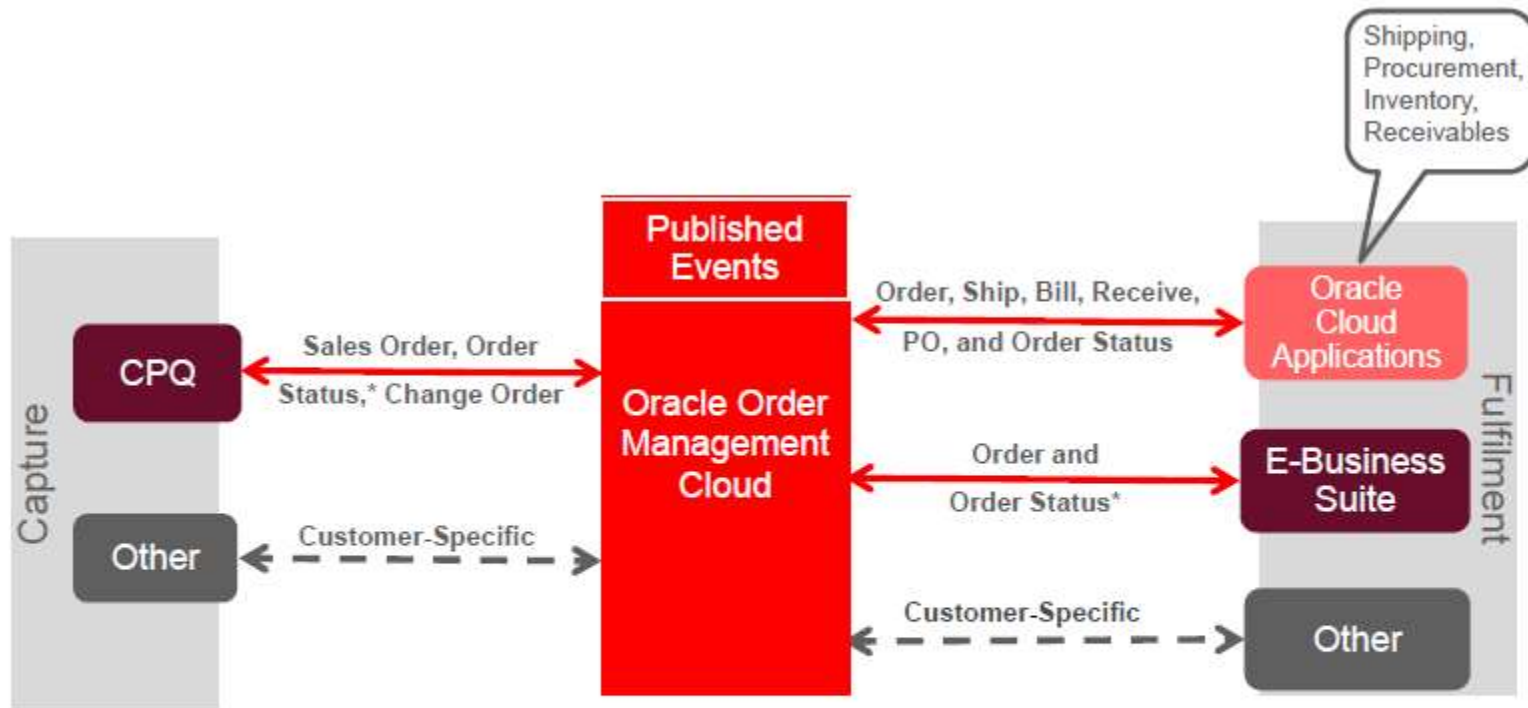
Invoice
Bill
Collect



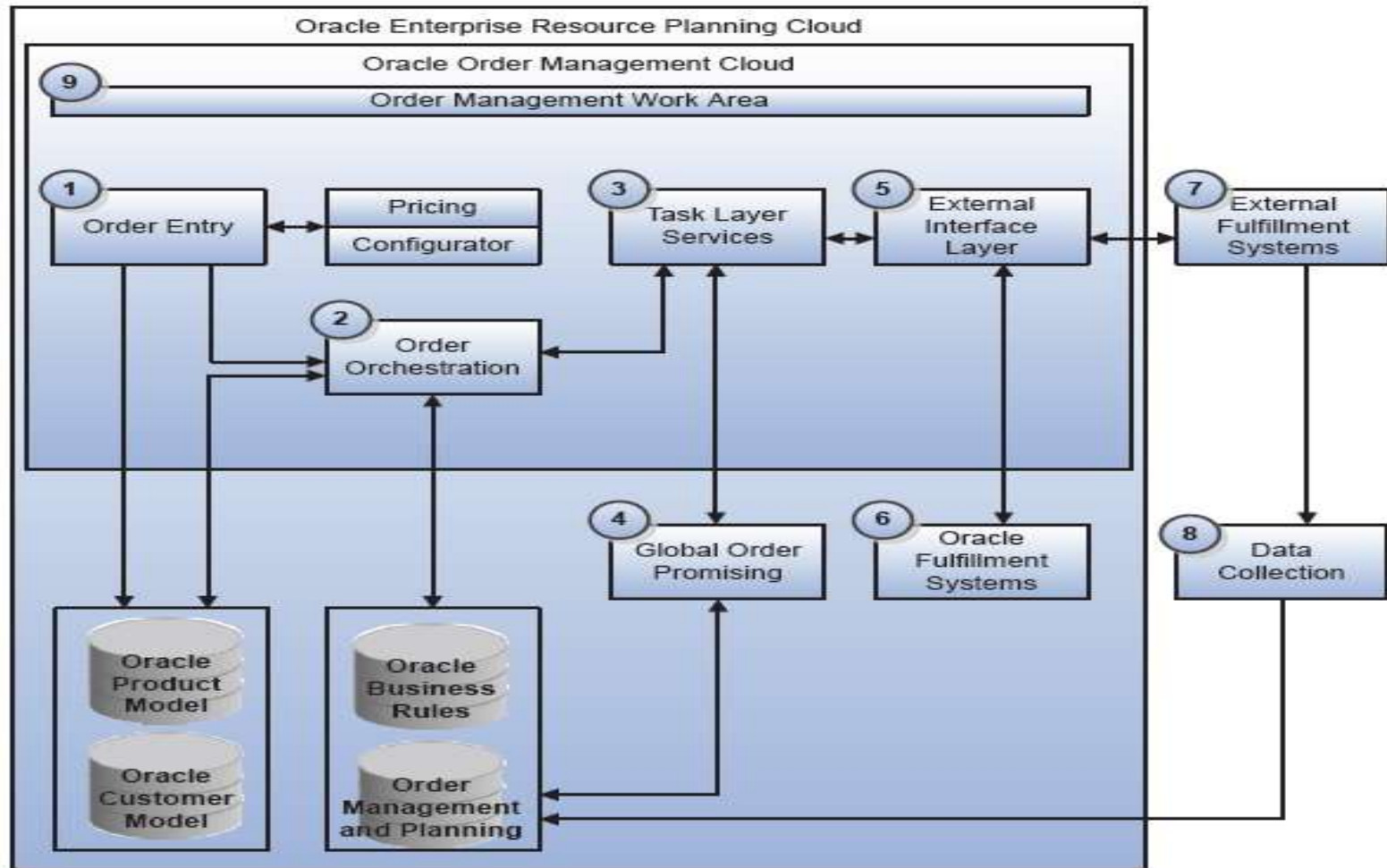
Role of Order Management Cloud in the Order-to-Cash Flow



Order Management Cloud Integrations



Order Management Cloud Architecture



Order Management overview page

Overview

Search



Advanced

Tasks ▼

Create Order

All

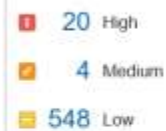
Orders on Backorder



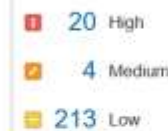
Orders Past Due



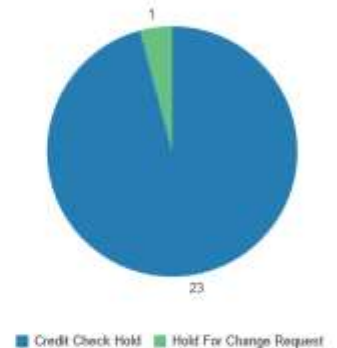
Fulfillment Lines i...



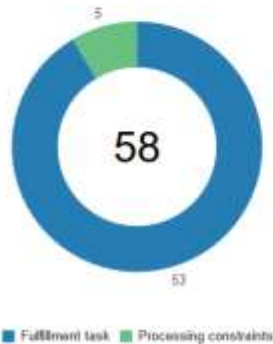
Orders in Jeopardy



Orders on Hold



Orders in Error



Draft Orders in Error



Order Entry form

Create Order: TARGET

 Social Total: 3,225.60 Actions  Save  Submit  Cancel

Currency = US Dollar

Customer TARGET

Contact

Contact Method

* Ordered Date 4/16/18 10:14 AM

Purchase Order

Order Type

Business Unit S BU

Bill-to Customer TARGET

Bill-to Account 15015

Ship-to Customer TARGET

Ship-to Address 7101 W Van Buren, PHOENIX, AZ 85043

Sales Credits



Order Lines



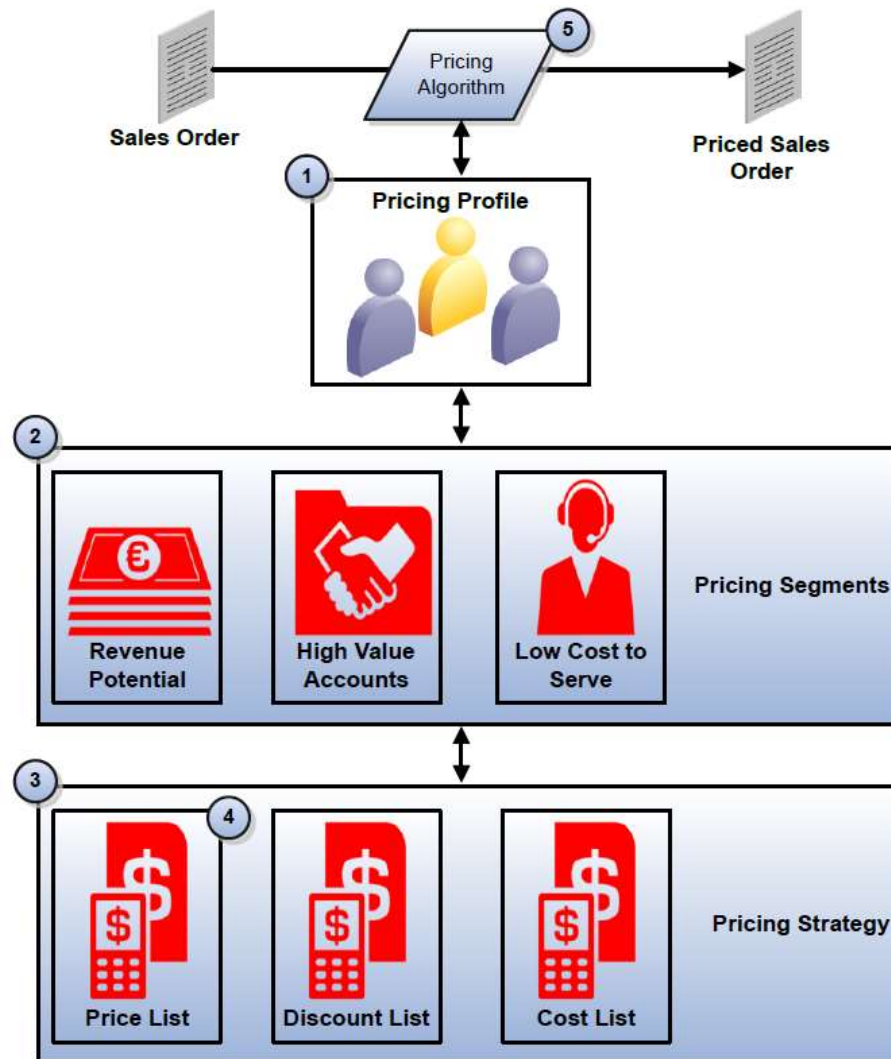
Select Item

Add

View

	Item	Duration	Period	Quantity	UOM	On Hand	Billing Frequency	Number of Billing Periods	Your Price	Amount	C D
1	WFL004002-			20	Case	 In Stock	One Time Billing	1	Sale Price 161.28	3,225.60	

Pricing



Pricing Contd.,

Create Order: TARGET

Currency = US Dollar

Customer: TARGET

Contact:

Contact Method:

Ordered Date: 4/16/18 10:14 AM

Purchase Order:

Order Type:

Business Unit:

Bill-to Customer:

Bill-to Account:

Ship-to Customer:

Ship-to Address:

Sales Credits:

Total: 3,225.60

Actions: Save Submit Cancel

Total

Total List Price	3,830.40
Discount	-604.80
Total Net Price	3,225.60
Shipping	0.00
Total Tax	0.00
Total Credit	0.00
Pay Now	3,225.60

Done

Order Lines

Select Item

View

Item	Duration	Period	Quantity	UOM	On Hand	Billing Frequency	Number of Billing Periods	Your Price	Amount
1 WFL004002			20	Case	In Stock	One Time Billing	1	Sale Price 161.28	3,225.60

Pricing Contd.,

Create Order: TARGET

Currency = US Dollar

Customer: TARGET

Contact: [Dropdown]

Contact Method: [Dropdown]

* Ordered Date: 4/16/15 10:14 AM

Purchase Order: [Dropdown]

Order Type: [Dropdown]

Business Unit: WPA US RJ

Total: 3,225.60

Actions: Save Submit Cancel

View Pricing Strategy and Segment

Pricing Segment: Standard Segment

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

Strategy Name: Standard Strategy

Strategy Explanation: The applicable pricing strategy for this transaction is Pricing Strategy=Standard Strategy because Pricing Segment=Standard Segment

Done

Order Lines

Select Item [Search]

View [Dropdown]

Item	Duration	Period	Quantity	UOM	On Hand	Billing Frequency	Number of Billing Periods	Your Price	Amount
1 WFL004002			20	Case	In Stock	One Time Billing		161.28	3,225.60

Pricing Contd.,

Manage Pricing Segments

Create Pricing Segment Matrix

Save and Close

Save

Cancel

Manage Pricing Segments

Delete Pricing Segment Matrix

Actions View + - X

Row	Condition Columns						Result Columns	
	Revenue Potential (=)	Customer Size (=)	Cost To Serve (=)	Customer Value (=)	Customer Rating (=)	* Pricing Segment	* Precedence	Start Date
			CPU	High	Product	Supermarket-CPU	100	
						Standard Segment	100	

Edit Pricing Strategy: Standard Strategy

Approve

Save and Close

Save

Cancel

Name: Standard Strategy Status: Approved

Description:

Default Currency: USD

Default GL Conversion Type:

Objective:

* Start Date: 3/1/15 6:28 PM

End Date:

☒ Allow price list override

☐ Allow currency override

Business Unit: A US BU

Additional Information

Pricing Rules Shipping Rules Guidelines Allowed Override Categories

Price Lists Return Price List Cost List Discount List Currency Conversion List

4 Segment Price Lists

Actions View Portal X - + - Detail Wrap

Segment Price List Details							Strategy Association Details		
Name	Description	Business Unit	Currency	Status	Start Date	End Date	* Start Date	End Date	Precedence
CY-17 Price List		US BU	USD	Approved	3/1/15 6:22 PM		3/1/15 6:30 PM		

Pricing Contd.,

Manage Pricing Strategy Assignments

Save and Close Save Cancel

Actions View Format + X Create Assignment Matrix

* Assignment Level	* Pricing Context	* Transaction Type	* Start Date	End Date
Line	Material Transfer	Internal order	1/1/17 3:36 PM	
Header	Sales	Sales order	12/1/17 7:24 PM	

Header-Sales-Sales order-12/01/2017 19:24: Pricing Strategy Assignment Rules

Delete Assignment Matrix

Actions View + X

Row	Condition Columns	Result Columns
	Pricing Segment (=)	* Pricing Strategy
	Standard Segment	Standard Strategy

Order Orchestration

What is it?


A process that includes a sequence of steps. These steps process one or more fulfillment lines during order fulfillment.

Order Management Cloud attempts to assign an orchestration process to a fulfillment line or group of fulfillment lines.

You can set up an orchestration process so that it meets the requirements of your organization. You specify the rules that determine how Order Management Cloud creates the orchestration process at run time, and then assigns objects to the fulfillment lines that Order Management creates as part of this order processing.

Example of Orchestration Process

- Order Management comes predefined with the following orchestration process:

Validation	Process Name	Description
	DOO_BillOnlyGenericProcess	Bill-only orchestration process.

Columns Hidden 2

DOO_BillOnlyGenericProcess: Step Details

View ▼ Format ▼  Freeze  Detach  Wrap

Step	Step Name	Task Type	Task
100	Create Invoice	Invoice	Invoice
200	Wait for Invoice	Invoice	Invoice

Order Orchestration contd.,

- DOO_Order Fulfillment Generic Process

View ▼ Format ▼ Freeze Detach Wrap


Step	Step Name	Task Type	Task	Service
100	Schedule	Schedule	Schedule	Create Scheduling
200	Conditional			
300	Request Supply	DOO_Supply	Supply Orchestration	Create Supply Request
400	Pause	Pause	Pause	Pause Process
500	Create Back to Back Shipment Request	Shipment	Ship Back-to-Back Goods	Create Shipping
600	Wait for Back to Back Shipment Advice	Shipment	Ship Back-to-Back Goods	Wait for Shipment
700	Create Purchase Request	DOO_Procurement	Procure	Create Purchase Request
800	Wait for Procurement	DOO_Procurement	Procure	Wait for Procurement
900	Create Reservation	Reservation	Reserve	Create Inventory Reservation
1000	Create Shipment Request	Shipment	Ship	Create Shipping
1100	Wait for Shipment Advice	Shipment	Ship	Wait for Shipment
1200	Merge			
1300	Create Invoice	Invoice	Invoice	Create Billing Lines
1400	Wait for Invoice	Invoice	Invoice	Wait for Billing

Order Orchestration Contd.,

Order: TARGET - 41314 - Processing

 Social Actions **Refresh** **Done**

Last Refreshed 4/22/18 10:55

Customer	TARGET	Source Order Revision	1	Customer Contact	
Customer Registry ID	32043	Source Order Revision Date		Reason for Change Order	
Purchase Order		Source Order	41314	Comments	
Status	Processing	Source Document Type	Sales order	Canceled Date	
User Request Status		Ordered Date	4/16/18 10:14 AM	Attachments	None
On Hold		Processes Assigned	Yes	Additional Information	
Source Order System	OPS	Message Type			
Revision Source Order System		Business Unit	US BU		

Order Lines **Fulfillment Lines** Returns

Actions **View** **Format**   **Schedule** **Check Availability** **Freeze** **Detach**     Wrap

Fulfillment Line	Exception Type	Message Type	User Request Status	Customer	Item	Order Line	Locked	Model	Orchestration Process Number	Orchestration Process Name	Status
1-1				TARGET	WFL0040...				300000009981458	DOO_OrderFulfillmentGeneric...	Not Started

Order Orchestration Contd.,

Orchestration Process: DOO_OrderFulfillmentGenericProcess - 300000009981458

[Recover Process](#) [Cancel Current Task](#) [View Hold Details](#) [Refresh](#) [Done](#)

Last Refreshed 4/22/18 10:56

Customer: TARGET	Jeopardy Score: 5	Planned Fulfillment Date: 4/24/18 1:55 AM
Customer Registry ID: 32043	Jeopardy Reason: Ship: Required Completion Date 4/22/18 10:14 PM. Expected Completion Date 4/24/18 1:55 AM. Create Shipment Request	Actual Fulfillment Date:
Order: 41314	Jeopardy Priority: Low	Required Fulfillment Date: 4/22/18 10:14 PM
Process Transaction Value: 3,225.00 USD	Message Type:	Ordered Date: 4/16/18 10:14 AM
Process Standardized Value: 3,225.00 USD	Actual Start Date: 4/22/18 10:06 PM	Paused Tasks:
Status: Scheduled	Actual Completion Date:	
Locked: No	Planned Completion Date: 4/24/18 3:55 AM	

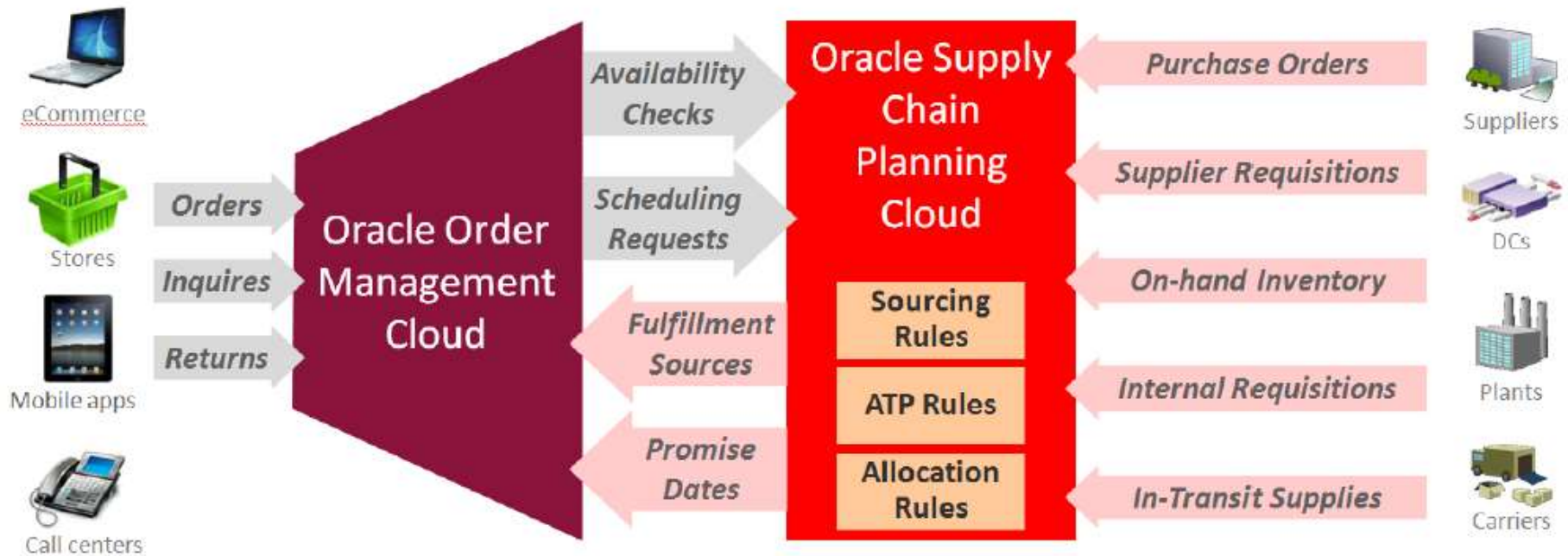
Orchestration Plan Fulfillment Lines

View Actions

Task Types All tasks



Global Order Promising



Global Order Promising contd.,

Global Sourcing Rules	Local Sourcing Rules
Define orgs or suppliers from where an end demand is fulfilled	Define sources of supply for a specific organization
Are not associated with an org	Are specified at an org
Can contain only transfer or buy (drop ship) sources	Contain transfer, buy, and make sources

Sourcing Rule	Assignment Level	Assigned To
TransferFromD1D2Allied	Item Category	Tablets
TransferFromD1D2	Item	New Tablet
TransferFromD1	Item and Customer	New Tablet and Big Customer

Global Order Promising contd.,


Promising Mode	Details	Usage	Supports
Infinite availability-based	Supply assumed to be infinite	Use for low value, unconstrained items	Calendars
Lead time-based	Supply always available after a lead time	Use for items with reliable lead times	Calendars and lead times
Supply chain availability search	Search for actual supplies	Use for fast moving, critical items where exact supply tracking is important	Calendars, lead times, detailed supply and demand matching, optimal fulfillment


Global Order Promising contd.,


Create Order: TARGET


 Social Total: **3,225.60** Actions  Save  Submit  Cancel


Currency = US Dollar


Customer  TARGET


Contact 


Contact Method 


* Ordered Date 4/16/18 10:14 AM 


Purchase Order 


Order Type 


Business Unit  S BU

Bill-to Customer  TARGET

Bill-to Account  15015

Ship-to Customer  TARGET


Ship-to Address  7101 W Van Buren, PHOENIX, AZ 85043

Sales Credits 



Order Lines



Select Item 

Add







View 



	Item	Duration	Period	Quantity	UOM	On Hand	Billing Frequency	Number of Billing Periods	Your Price	Amount	C D
1	WFL004002-I			20	Case 	 In Stock	One Time Billing 	1	Sale Price 161.28 	3,225.60	

Global Order Promising contd.,

 Shipment Details

General Shipping **Supply**

Warehouse LHW - L

Demand Class

Supplier

Allow Item Substitution No



Supplier Site

Order Line Details

View ▾

Estimate Order Availability

Freeze

	Over Item	Quantity	UOM	Shipping Method	Shipping Charge	Availability Status	Warehouse
1	 WFL00400...	20	Case			On time	 LHW - Los...

Columns Hidden 19 Columns Frozen 2

Global Order Promising contd.,

Check Availability

Currency = USD

Schedule All Done

Your results expire in 8:30

Fulfillment Lines

Actions	View	Format	Freeze	Detach	Wrap	Schedule	View Availability Options	Refresh Results
Edit								
Schedule								
View Availability Options								
Refresh Results								
Review Supply Availability								
Review Supply Allocation								
View Availability Details								
Export								
Order Promising Rules								
Remove from Set								
Add Back to Set								

Customer Name	Requested Item	Requested Item Description	Availability Status	Requested Quantity	UOM	Available Quantity	Av
TARGET	WFL004002	072142A25W.2: WFL PISTACHIO ...	On Time	20	Case	20	W

Hidden 69 Columns Frozen 1

Fulfillment Cost	Days of Delay	Available Item	Available Quantity	Expected Arrival Date	Expected Drop Ship Supplier	Expected Drop Ship Site
0.00 USD	0	WFL004002	20	4/23/18		

Review Supply Availability

Search

Search Results

			4/23/18
			4/23/18
			4/23/18
WFL004002	LHW	Supply	0
		Consumed	20
		Net	-20
		Cumulative	7,171

Global Order Promising contd.,

You can import orders that were created in channel systems by two methods:

- **Direct web service integration**
- **File-based import**

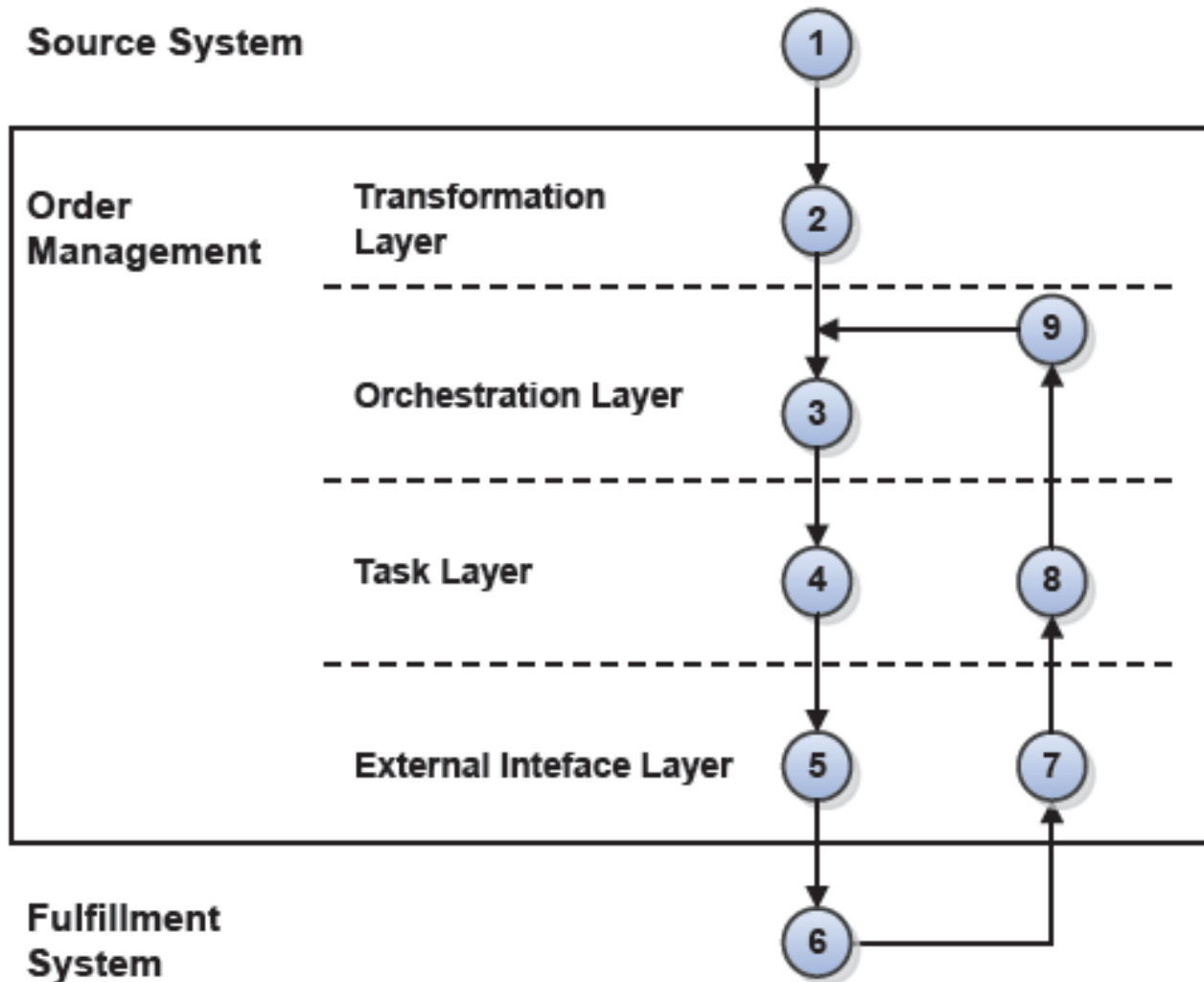
Direct Web Service Integration You create the connector service to integrate the channel system with Oracle Fusion Order Management.

- Oracle supplies the connector service for use of Configure, Price, Quote (CPQ) as a channel system.

File-Based Import The file-based import process consists of the following steps:

1. Create order file using the provided template.
2. Upload the file to the Universal Content Management (UCM) account.
3. Run a scheduled process to transfer file contents to interface tables. Run a scheduled process to transfer data from the interface tables to base tables.

Order Management Cloud Architecture for import orders



Transformation Process

Source Order

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

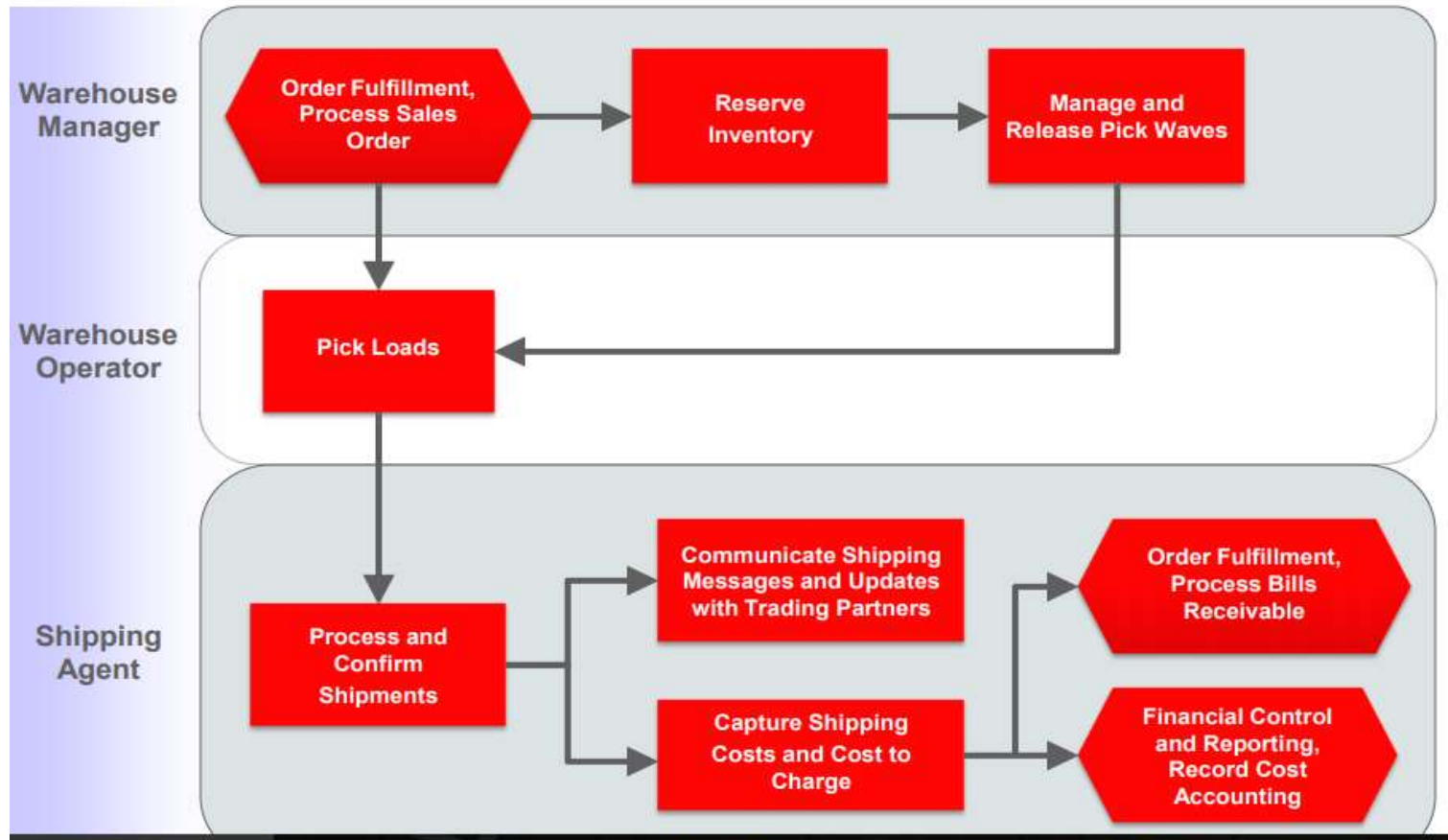
Transformation

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

Shipping process

Shipping Process Flow and User Roles



Q&A

Thank You



www.nexinfo.com

Contact Us



HEADQUARTERS

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Santa Ana, CA 92701



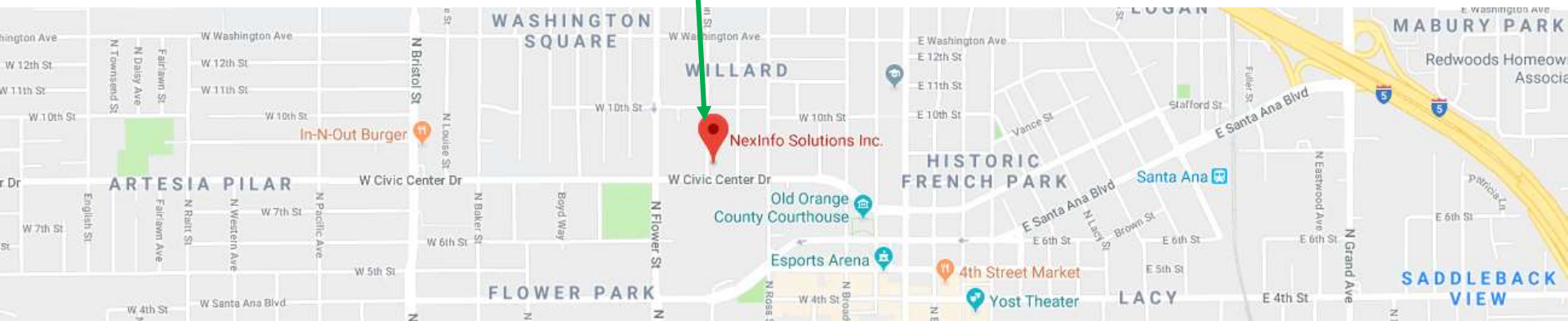
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