

Oracle R12 Order Management Course Summary

Description

This course is designed to give students the knowledge to use Order Management to manage the order fulfillment process.

Objectives

At the end of this course, students will be able to:

- Manage customer accounts
- Enter and manage orders
- Update orders
- Perform mass changes on orders
- Create holds
- Cancel and close orders

Topics

- Introduction to Oracle Order Management
- Sales Orders
- Returns
- Cancellation of Orders and Returns
- Copying Orders
- Querying Orders or Returns
- Generating Invoices and Credit Notes
- Printing Invoices and Credit Notes
- Pricelists
- Mass Changes
- Holds
- Backorders
- Drop Shipments
- Order Management Set Up
- Managing Customers
- Order Management Exercises

Audience

This course is designed for End Users of Order Management.

Prerequisites

Knowledge of the order management process in the student's organization is required. The ability to navigate competently in Oracle 11i Applications would be advantageous.

Duration

One day

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Course Outline

I. Introduction to Oracle Order Management

- A. Sales Orders
- B. Returns
- C. Cancellations
- D. Copying Orders
- E. Querying Orders or Returns
- F. Generating Invoices and Credit Notes
- G. Pricelists
- H. Mass Changes
- I. Holds
- J. Integration with Other Modules
- K. Folder Functionality

II. Sales Orders

- A. Standard Orders
- B. Quick Orders
- C. Standard Orders without Locators
- D. Quick Orders without Locators
- E. Standard Orders with Locators
- F. Quick Orders without Locators

III. Returns

- A. Returns with Inventory Receipt
- B. Returns without Inventory Receipt

IV. Cancellation of Orders and Returns

- A. Canceling Individual Order or Return Lines
- B. Canceling Entire Orders or Returns

V. Copying Orders

- A. Copying Orders
- B. Quick Copy
- C. Header Copy
- D. Lines Copy
- E. Pricing Options Copy
- F. Copying Lines from One Order to Another

VI. Querying Orders or Returns

- A. Run a Query Using Order Organizer
- B. Saving a Query
- C. Re-running a Saved Query
- D. Deleting a Particular Order

- E. Generating Invoices and Credit Notes
- F. Running the Auto Invoice Process
- G. Querying Invoices and Credit Notes

VII. Printing Invoices and Credit Notes

- A. Run the Print Request
- B. Monitor the Print Request

VIII. Pricelists

- A. Creating a Pricelist
- B. Maintaining Pricelists
- C. Price Adjustments Using the Price List Setup Screen
- D. Price Adjustments Using the Adjust Price List Screen
- E. Additions Using the Price List Setup Screen
- F. Additions Using the Add Items to Price List Screen
- G. Copying a Price List to Create a New Price List

IX. Mass Changes

- A. Mass Changes at Order Header Level
- B. Mass Changes at Order Line Level

X. Holds

- A. Applying Holds
- B. View Orders that are on Hold Source
- C. View Hold History
- D. Define a Hold Source
- E. Apply a Hold to a Single Existing Order or Return
- F. Apply a Hold to Multiple Order Lines or Return Lines
- G. Releasing Holds
- H. View or Release a Hold Source
- I. Release a Single Existing Order or Return
- J. Release a Specific Order Line or Return Line
- K. Release Multiple Orders or Returns
- L. Release Multiple Order or Return Lines
- M. Release Multiple Order or Return Lines for Expired Holds
- N. Reports

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Course Outline (cont'd)

XI. Backorders

- A. Check status of backordered lines
- B. Pick Release Backordered items
- C. Invoice backordered items
- D. Backorder reports

XII. Drop Shipments

- A. Processing a Drop Shipment Order
- B. Generate a Purchase Order
- C. Receipt the Purchase Order
- D. Invoice the customer
- E. Drop Shipment returns

XIII. Order Management Set Up

- A. Shipping Execution Roles
- B. Copy an Existing Shipping Execution Role
- C. Grant a Shipping Execution Role to a User
- D. Charges Set Up
- E. Set Up a Transaction Type Line
- F. Set Up a Transaction Type Order

XIV. Managing Customers

- A. Find / Create / Amend / Merge Customer accounts
- B. Create Customer Profile Class

XV. Order Management Exercises