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S317261 - Introducing JD Edwards EnterpriseOne Fulfillment Management

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Product Strategy Manager



The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Program **Agenda**

- Business Challenges
- Order Management Process
- **Fulfillment Management Process**
- Module Benefits
- Q&A





Business Challenges

How can we...

Improve order fill rates?

Reduce penalty fees?

Provide the best service?

Prioritize customer demand?

Reduce costs?



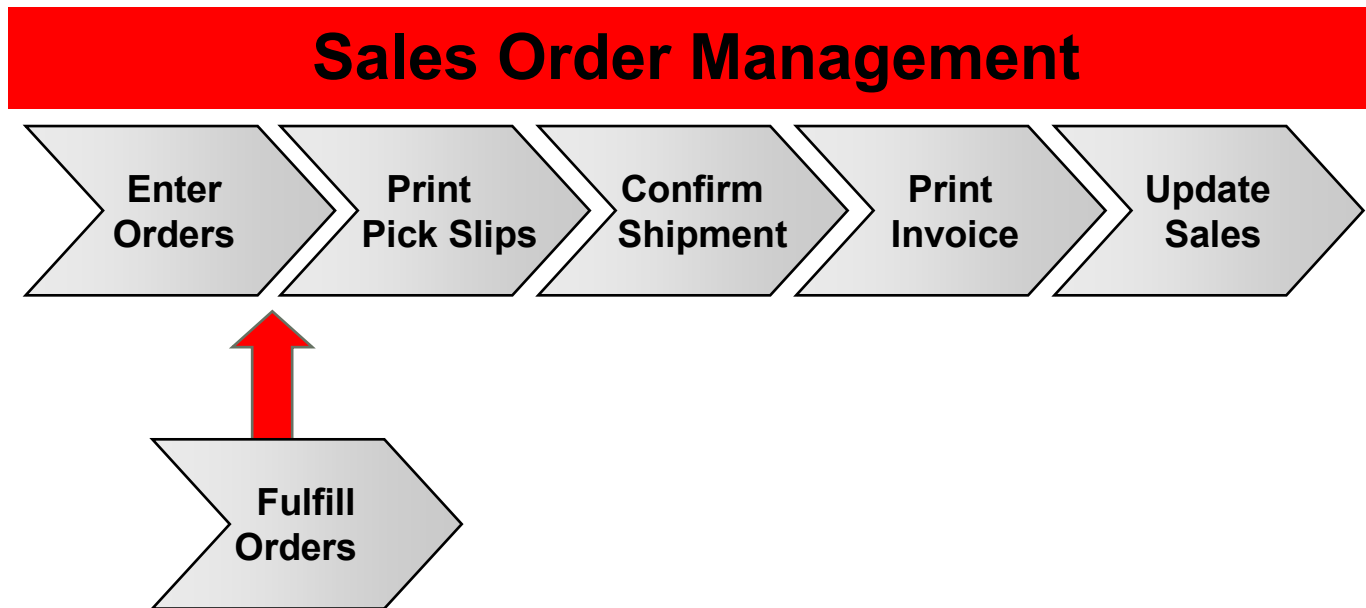


Order Management Process

**SOFTWARE.
HARDWARE.
COMPLETE.**

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Order Management Process





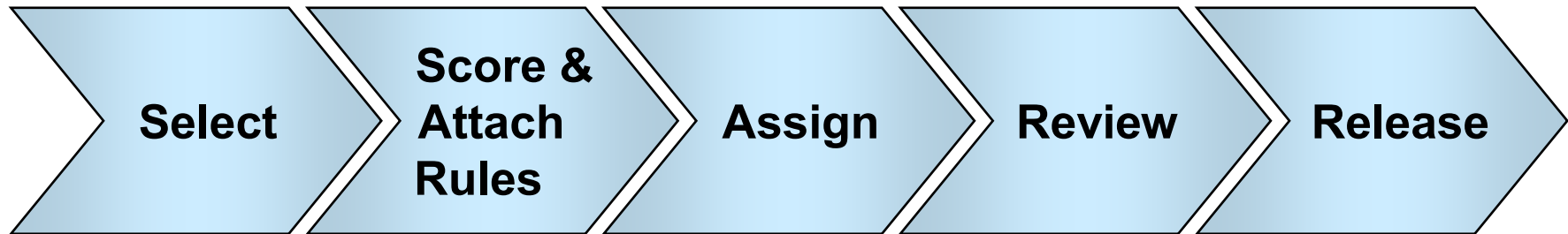
**Fulfillment Management
Process**

**SOFTWARE.
HARDWARE.
COMPLETE.**

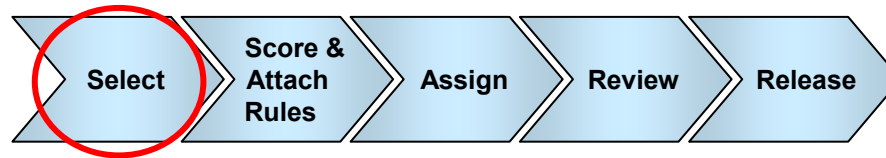
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Fulfillment Management Process



Fulfillment Management Process



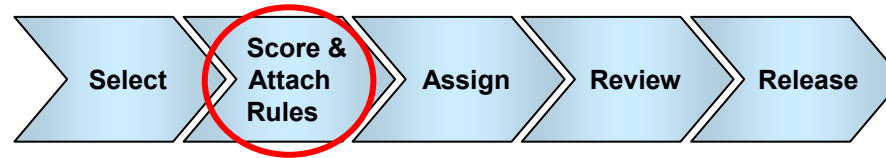
Determine the order lines that enter the process

- Create orders using any method of sales order entry



- Determine the order lines that enter the fulfillment process using preferences
 - Activate by document type
 - Set up by item, item group, customer, and customer group

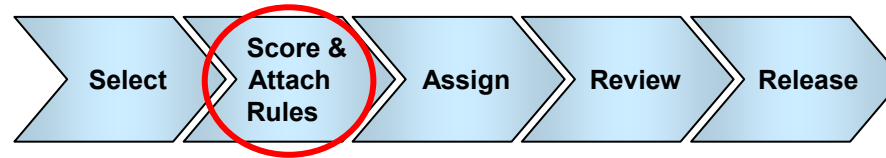
Fulfillment Management Process



Define the priority rank of the order lines

- Score order detail lines based on:
 - Order Type, Line Type, Requested Date, and Customer Priority
 - Optional call to a custom business function
- Score order lines during sales order entry or using batch application

Fulfillment Management Process



Define the priority rank of the order lines

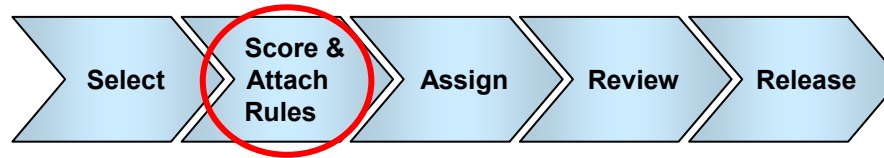
Advanced Preference Scoring

- Use 3 new preferences for order type, line type, and requested date age
- Use special handling field on Customer Priority
- Weighted average of above criteria

Basic Score Assignment

- Use a grid to input the assigned score value
- Import/export
- No calculations

Fulfillment Management Process



Define the priority rank of the order lines

Advanced Preference Scoring

Sequence	Days until Requested Date	Requested Date Priority
10.000	0000	4.000

Process

- Scoring Method:

Blank = Basic
1 = Advanced
- Weight Factor for Order Type Priority Preference:
- Weight Factor for Line Type Priority Preference:
- Weight Factor for Customer Sold To Priority:
- Weight Factor for Requested Date Priority Preference:
- Weight Factor for Custom Priority:
- Custom Priority Calculation Function:

Basic Score Assignment

Customer Priority From	Requested Date Age From	Order Type	Line Type	Order Score
10.000	999-	SO	S	100.000
10.000	5	SO	S	50.000
10.000	10	SO	S	10.000
10.000	40	SO	S	5.000
20.000	999-	SO	S	120.000
20.000	5	SO	S	55.000
20.000	10	SO	S	15.000
20.000	40	SO	S	6.000
30.000	999-	SO	S	125.000
30.000	5	SO	S	60.000

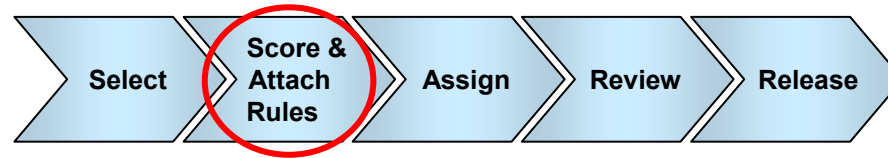
Fulfillment Management Process



Specify how the system fulfills inventory

- Fulfillment Rules
 - Fill percent is based on score and current inventory level

Fulfillment Management Process

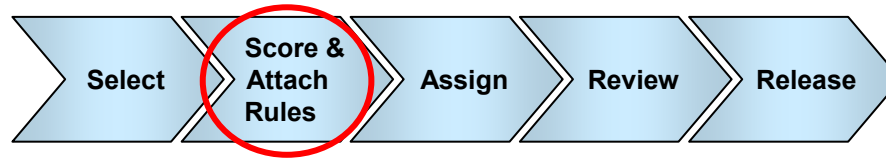


Specify how the system fulfills inventory

- Examples:
 - Order lines with higher priority scores are entitled to dip into safety stock more than lines with lower priority scores
 - When inventory levels are low, lines may be partially filled

Sequence No.	Score Range From	Safety Stock Percentage	Fulfillment Percentage
10	0	.0000%	100.0000%
20	5	50.0000%	100.0000%
30	10	75.0000%	80.0000%
40	25	100.0000%	75.0000%

Fulfillment Management Process



Specify how the system fulfills inventory

- Service Level Rules
 - Validate lines and orders are filled to specific service levels
 - Validate fill levels prior to release from fulfillment
 - Create rules based on:
 - Customer, Customer Group
 - Item, Item Group
 - Branch/Plant
 - Optional call to custom business function for unique or highly complex service level rules

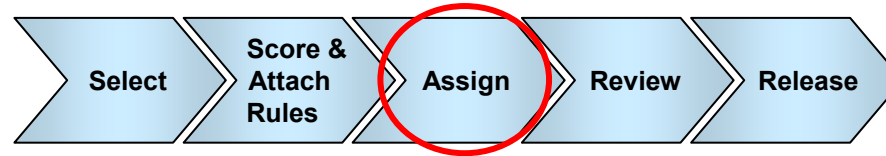
Fulfillment Management Process



Specify how the system fulfills inventory

- Line Fill Percentage
 - Compare the order quantity and the allocated quantity to the service level fill percent
- Order Fill Percentage by Line Count
 - Used in conjunction with the line fill percentage
 - Compare the number of lines that meet fill requirements to the total number of lines on the order
- Specify whether to commit partial quantities if the service level fill percent is not met

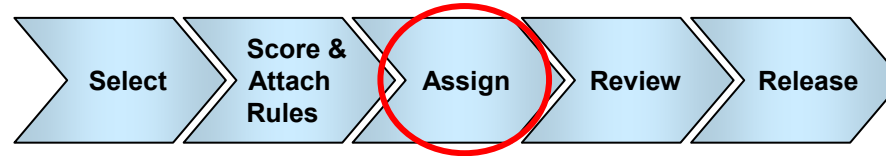
Fulfillment Management Process



Assign inventory to open sales order lines

- Batch fulfillment
- Interactive workbench

Fulfillment Management Process



Assign inventory to open sales order lines

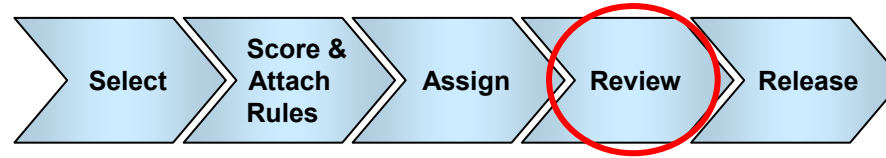
- Batch Fulfillment

- Fill inventory to order lines based on:

- Data selection
- Sort sequence (ie: score, date)
- Fulfillment rules
- Service level rules

- Evaluate and optionally re-evaluate order lines multiple times before the inventory is assigned (run “what-if” scenarios)

Fulfillment Management Process



Modify inventory assignments

- Interactive Workbench
 - View the results of the batch fulfillment
 - Exception monitoring for order lines that could not be filled
 - Make changes:
 - Quantity to Fill
 - Promised Delivery Date
 - Branch/Plant

Fulfillment Management Process

Fulfillment Workbench - Fulfillment Workbench - Search

Close

Basic Search Advanced Search

Fulfillment Plan ID

Branch Plant

Dates

Date Type

From

To

Show

Unfulfilled Items with Sales Order Lines

Unfulfilled Customers with Sales Orders

Sales Order Lines Only

Find Clear QBE

Fulfillment Management Process

Unfulfilled Customers

Records 1 - 2 Customize Grid > Basic

	Sold to Address Number	Sold To Address name	Priority	Credit Message
<input checked="" type="radio"/>	4242	Capital System fmWBChange	0	
<input type="radio"/>	4244	Creekside Warehouse	2	

Sales Order Lines--for-Capital System fmWBChange

Records 1 - 7 Customize Grid > Basic

	Order Number	Or Ty	Customer Sold To	Customer Sold To Name	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Fulfilled Quantity	Unfulfilled Quantity	Order Score	Request Date	Promised Delivery
<input type="checkbox"/>	1945	SO	4242	Capital System...	13756		8.0000	EA	8.0000		.000	09/07/10	09/07/10
<input type="checkbox"/>	1939	SO	4242	Capital System...	13756		3.0000	EA		3.0000	2.800	09/07/10	09/07/10
<input type="checkbox"/>	1947	SO	4242	Capital System...	13756		25.0000	EA	25.0000		2.800	09/17/10	09/17/10
<input type="checkbox"/>	1939	SO	4242	Capital System...	13756		5.0000	EA		5.0000	3.800	09/07/10	09/07/10
<input type="checkbox"/>	1947	SO	4242	Capital System...	13756		15.0000	EA	15.0000		3.800	09/17/10	09/17/10
<input type="checkbox"/>	1942	SO	4242	Capital System...	13756		12.0000	EA		12.0000	5.950	09/13/10	09/13/10
<input type="checkbox"/>	1942	SO	4242	Capital System...	13756		10.0000	EA		10.0000	6.950	09/13/10	09/13/10

Other Row Actions: -- Select One --

Fulfillment Management Process

Show

- Unfulfilled Items with Sales Order Lines
- Unfulfilled Customers with Sales Orders
- Sales Order Lines Only

Find

Clear QBE

Unfulfilled Items

Records 1 - 3 Customize Grid > Basic

	Description	2nd Item Number	Business Unit	Quantity Available	Quantity Unfulfilled	Dual Item	Kit Parent Item
<input checked="" type="radio"/>	Touring Bike, Red	220DEMO	30	63.0000	72.0000	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/>	Mountain Bike, Red	210DEMO	M30	120.0000	50.0000	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/>	Mountain Bike, Red	210DEMO	30	48.0000	23.0000	<input type="checkbox"/>	<input type="checkbox"/>

Fulfillment Shortfall



Sales Order Lines--for-Touring Bike, Red

Records 1 - 7 Customize Grid > Basic

Order Number	Or Ty	Customer Sold To	Customer Sold To Name	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Fulfilled Quantity	Unfulfilled Quantity	Order Score	Request Date	Promised Delivery
1939	SO	4242	Capital System...	13756		3.0000	EA		3.0000	2.800	09/07/10	09/07/10
1947	SO	4242	Capital System...	13756		25.0000	EA	25.0000		2.800	09/17/10	09/17/10
1941	SO	4244	Creekside War...	4244	Creekside War...	50.0000	EA		50.0000	5.500	09/08/10	09/08/10
1942	SO	4242	Capital System...	13756		12.0000	EA		12.0000	5.950	09/13/10	09/13/10
1944	SO	4244	Creekside War...	4244	Creekside War...	7.0000	EA		7.0000	8.650	09/16/10	09/16/10
1940	SO	4243	Custom Brokers	4243	Custom Brokers	15.0000	EA	15.0000		10.150	09/10/10	09/10/10
1943	SO	4243	Custom Brokers	4243	Custom Brokers	3.0000	EA	3.0000		10.150	09/17/10	09/17/10

Edit Fulfillment

Release Fulfillment

Other Row Actions:

-- Select One --

Close

Fulfillment Management Process

Fulfillment Workbench - Fulfillment Workbench - Edit



Save and Close

Cancel

Item Availability

Item Number:

Branch Plant: Quantity Available Primary: EA Quantity On Hand:

Safety Stock: Transactional: EA

Included in Availability Calculation

Edit Fulfillment

Change Branch/Plant

Records 1 - 6

Customize Grid

Demo

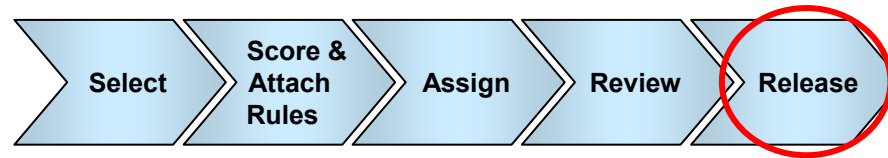
	+	-	Branch Plant	Item Number	Description	UM	Fulfill Qty	Unfulfilled Qty	Quantity Ordered	Promised Delivery	Request Date	Order Score	% Profit Margin	Sold To	Sold To Name
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		30	220DEMO	Touring Bike, Red	EA		3.0000	3.0000	09/07/10	09/07/10	2.800	48.880	4242	Capital System fmWBC
<input type="radio"/>			30	220DEMO	Touring Bike, Red	EA	25.0000		25.0000	09/17/10	09/17/10	2.800	48.880	4242	Capital System fmWB...
<input type="radio"/>			30	220DEMO	Touring Bike, Red	EA	.0000	12.0000	12.0000	09/13/10	09/13/10	5.950	48.880	4242	Capital System fmWB...
<input type="radio"/>			30	220DEMO	Touring Bike, Red	EA	.0000	7.0000	7.0000	09/16/10	09/16/10	8.650	48.880	4244	Creekside Warehouse
<input type="radio"/>			30	220DEMO	Touring Bike, Red	EA	15.0000		15.0000	09/10/10	09/10/10	10.150	48.880	4243	Custom Brokers
<input type="radio"/>			30	220DEMO	Touring Bike, Red	EA	3.0000		3.0000	09/17/10	09/17/10	10.150	48.880	4243	Custom Brokers

Change Branch Plant

Other Row Actions

-- Select One --

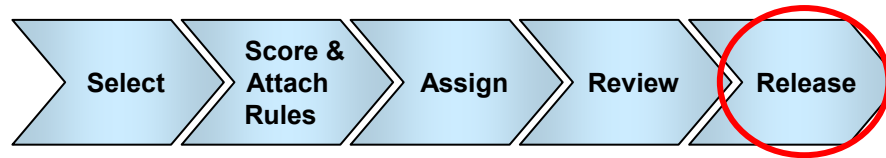
Fulfillment Management Process



Move order lines into sales order processes

- Validate and Release the inventory assignments
 - Batch Fulfillment UBE, Interactive Workbench, Release UBE
- Orders lines are in fulfillment until released by the UBE
- When the plan is released, the system:
 - Returns order lines to the next step in the standard sales order process (ie: print pick slip)
 - Splits order lines if the order quantity is partially fulfilled
 - Cancels the open balance if specified in service level rules
 - Sends a notification to a user-defined party if an order is not fully filled

Fulfillment Management Process



Move order lines into sales order processes

- Unfilled Notification Email

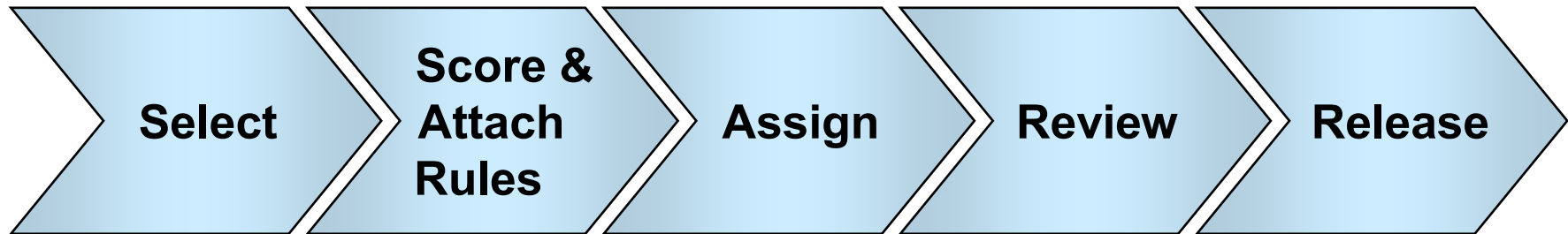
From: Kara Berlener
To: Kara Berlener
Cc:
Subject: Unfilled Orders

Sent: Mon 11/2/2009 9:28 AM

Sold To	55108	MR Demo Customer 3		Ship To	55108	MR Demo Customer 3		
Order Number	Order Type	Order Company	Line Number	Item Number	Quantity Ordered	Quantity Released	Quantity Fulfilled	Quantity Unfulfilled
3933	SO	00001	1.000	MRJACKET3	100.0000	0	80.0000	20.0000



Fulfillment Management Process





**Fulfillment Management
Benefits**

**SOFTWARE.
HARDWARE.
COMPLETE.**

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What MSS Technologies Is Saying

“After attending the beta training for the new order fulfillment management functionality in EnterpriseOne, I am very excited about the benefits this will create for our customers. The fulfillment tools will allow our customers to streamline and formalize manual processes for fulfillment orders on a daily basis. The fulfillment scoring preference and service level rules such as order and line fill percentage, partials and cancel rules will greatly automate the execution of the customer order policies. I think our customers in the consumer products and the medical products industries will enjoy huge benefits from this new functionality.”

Dianne Bloch, Consultant, MSS Technologies, Inc.

What AMX International Is Saying

“Fulfillment Management will allow our customers to improve their customer satisfaction and reduce costs to service their customers. This is a great addition to the JDE E1 portfolio of applications and can be used across multiple verticals.”

Tim Thronson, Senior Solution Consultant, AMX International, Inc.

Fulfillment Management

Drives Operational Improvements



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JD EDWARDS ENTERPRISEONE

Prioritize Demand

- Score sales orders lines
- Assign inventory based on priority and service level rules
- Assign partial quantities based on customer
- Cancel open balance quantities based on user defined fill rate rules

Improve Customer Service

- Improve order and line fill rates for priority customers
- Enforce targeted service levels
- Reduce late orders for priority customers
- Reduce backorders and lost sales
- Track reasons for overriding standard service level rules

Decrease Administrative Costs

- Enforce fill rates automatically
- Reduce costly penalty fees and fines
- Cancel open balances automatically based on rules
- Reduce transportation costs by enforcing number of releases (shipments)

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Business Challenges

How can we...

Improve order fill rates?

Reduce penalty fees?

Provide the best service?

Prioritize customer demand?

Reduce costs?





Matt Blumenshine

Senior Business Analyst
Spyder Active Sports – Boulder, Colorado

September 2010

"JD Edwards EnterpriseOne Fulfillment Management is flexible enough to address Spyder's fulfillment needs, including customer prioritization, order fill rates, shipping windows, and shipment frequency restrictions. The many levels of configuration that are possible through the workbench permit us to more precisely cater to our customers' shipping requirements. The visual overview of the processing that occurred clearly highlights exceptions which allow us to focus on the orders needing attention."



Q&A



Oracle OpenWorld
Latin America 2010

December 7–9, 2010



Oracle OpenWorld
Beijing 2010

December 13–16, 2010

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