

All I Wanted Was a Date - Come & See All the Options I Found in the Order Management Suite

Michelle Taylor

Principal Consultant – Order Management &
Shipping

DARC Corporation

Agenda

- Introduction
- Order Management Dates Overview
 - Description
 - Availability
 - Defaulting Capabilities
 - Query Capabilities
- Shipping Execution Dates Overview
 - Description
- Order Management to Shipping Date Matrix
- Conclusion

Options for Dates within the OM Suite

- Introduction
- Order Management, along with shipping offers many possibilities of trapping, calculating, managing data for different types of 'dates'.
- For example, Ordered Date, Request Date, Scheduled Ship Date, Earliest Acceptable Date, Latest Acceptable Date & Promise Date are just a few of the 'dates' that businesses need to determine how they will use to process various transactions.
- We will review the various date types & how they map between Order Management & Shipping.

Options for Dates within the OM Suite

- What are some of the questions that can be answered by dates?
 - When was the order placed?
 - What does the customer want the requested product to ship arrive?
 - What date did was the customer promised?
 - What is the earliest / latest the customer will accept delivery?
 - When is the product scheduled to ship?
 - When did the product actually ship?

Options for Dates within the OM Suite

- Questions answered by dates cont.
 - When is the product scheduled to arrive?
 - When did the product actually arrive?
 - What date was used to price the order?
 - If ordering a service, what is the start date of the service?
 - What date was used for taxing calculations?

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Options for Dates within the OM Suite

- Order Management Dates Overview
 - Ordered Date
 - Description:
 - Ordered Date generally represents the date the customer actually placed their order, and should not be interpreted as the date the order was entered in the system.
 - Signals for this date may be the date the order was received, or a date written on the ordering document.

Options for Dates within the OM Suite

– Ordered Date (cont.)

- Header / Line:
 - Ordered Date is available at the header level.
- Defaulting:
 - The most common source of a default for Ordered Date is the current date.
 - However, unless the business requirements state that date of entry equates to Ordered Date, we recommend this date not default and be entered according the specific rules.
- Query:
 - Ordered Date may be queried as a range in the Order Organizer.

Options for Dates within the OM Suite

- Ordered Date (cont.)
 - Query:
 - Order Organizer Searching

Options for Dates within the OM Suite

- Request Date / Order Date Type
 - Description:
 - Request Date and Order Date Type go hand in hand.
 - Request Date represents the date on which a customer has requested shipment or arrival of their order.
 - Order Date Type defines which type of date Request Date represents.

Options for Dates within the OM Suite

- Request Date / Order Date Type (cont.)
 - Header / Line:
 - Order Date Type may only be set at the header level, i.e. Request Dates on an order represent either an arrival or ship date.
 - Request Date may be set at either the header or line level.
 - Please note that Request Date at the line level is required.

Options for Dates within the OM Suite

- Request Date / Order Date Type (cont.)
 - Defaulting:
 - The most common source of a default for header level Request Date is the current date.
 - Line level Request Date may be defaulted from the header, or the current date, or entered manually.
 - Order Date Type may be defined at the Customer, or Customer Ship-To level, and these are defaulting sources.

Options for Dates within the OM Suite

- Request Date / Order Date Type (cont.)
 - Query:
 - Request Date may be queried as a range in the Order Organizer Line Information tab, and in the Scheduling Organizer

Options for Dates within the OM Suite

- Request Date (cont.)
 - Query:
 - Order Organizer Searching

Options for Dates within the OM Suite

- Request Date (cont.)

- Query:

- Scheduling Organizer Searching

Options for Dates within the OM Suite

- Promise Date
 - Description:
 - Promise Date represents the date to which a company has “committed” to delivering product to its customer.
 - This may be defined based on system rules, or on verbal / written agreement between the company and its customer.
 - Header / Line:
 - Promise Date is set at the line level.

Options for Dates within the OM Suite

- Promise Date (cont.)
 - Defaulting:
 - Several options are provided for entering and controlling the value in Promise Date.
 - Promise Date can be set according to the following options>
 - » First Schedule Ship / Arrival Date:
 - » First Request Date
 - » Manual
 - » Scheduled Ship / Arrival Date
 - » Request Date

Options for Dates within the OM Suite

- Promise Date (cont.)
 - Query:
 - Promise Date may be queried as a range in the Order Organizer Line Information tab, and in the Scheduling Organizer.

Options for Dates within the OM Suite

- Earliest/ Latest Acceptable Date
 - Description:
 - Earliest / Latest Acceptable Date is used in conjunction with Order Date Type and the results of an available to promise (ATP) query to determine if a line can be scheduled or not.
 - ATP will return a date that defines when the order line can be shipped / delivered (based on Order Date Type).
 - If the ATP date is between the Earliest Acceptable Date and the Latest Acceptable Date, the line will be scheduled.
 - Otherwise, the line will fail scheduling.

Options for Dates within the OM Suite

- Earliest/ Latest Acceptable Date (cont.)
 - Description (cont.):
 - Earliest Acceptable Date is determined by subtracting Earliest Schedule Limit from the Request Date.
 - Latest Acceptable Date is determined by adding Latest Schedule Limit to the Request Date.

Options for Dates within the OM Suite

- Earliest/ Latest Acceptable Date (cont.)
 - Header / Line:
 - Earliest / Latest Acceptable Dates are at the line level.
 - Earliest Schedule Limit and Latest Schedule Limit are set at the header level.

Options for Dates within the OM Suite

- Earliest/ Latest Acceptable Date (cont.)
 - Defaulting:
 - There are defaulting rules available for Earliest / Latest Acceptable Date, however it is recommended to not invoke these, and let the system calculate the dates as described above.
 - Earliest Schedule Limit and Latest Schedule Limit both have defaults that can be set at the header level. Default sources include the Customer, Customer Ship-To or manual entry.

Options for Dates within the OM Suite

- Earliest/ Latest Acceptable Date (cont.)
 - Query:
 - Latest Acceptable Date may be queried as a range via the Order Organizer, Line Information tab.

Options for Dates within the OM Suite

- Schedule Ship Date
 - Description:
 - Schedule Ship Date is the date that the application determines product will ship from the warehouse to the customer.
 - The behavior of Schedule Ship Date is based on the Order Date Type.
 - If Order Date Type is set to Ship Date, the system will allow entry of the Schedule Ship Date.

Options for Dates within the OM Suite

- Schedule Ship Date (cont.)
 - Description (cont.):
 - If the Order Date Type is set to Arrival Date, the system will not allow entry of the Schedule Ship Date because the date is derived from the requested Arrival Date and shipping time (if defined) from the warehouse to the customer.
 - Please note that if ATP is used to schedule lines, the system will only allow entry of a Schedule Ship Date that violates the ATP calculation if the profile option “OM: Authorized to Override ATP” is set to yes for the user.

Options for Dates within the OM Suite

- Schedule Ship Date (cont.)
 - Header / Line:
 - Schedule Ship Date is at the line level.
 - Defaulting:
 - There are defaulting rules available for Schedule Ship Date, however it is recommended to not invoke these, and let the system calculate the dates as described above.
 - Query:
 - Schedule Ship Date may be queried as a range via the Order Organizer, Line Information tab or via the Scheduling Organizer.

Options for Dates within the OM Suite

- Schedule Arrival Date
 - Description:
 - Schedule Arrival Date is the date that the application determines product will arrive at the customer's location.
 - The behavior of Schedule Arrival Date is based on the Order Date Type.
 - If Order Date Type is set to Arrival Date, the system will allow entry of the Schedule Arrival Date.

Options for Dates within the OM Suite

- Schedule Arrival Date (cont.)
 - Description (cont.):
 - If the Order Date Type is set to Ship Date, the system will not allow entry of the Schedule Arrival Date because the date is derived from the requested Ship Date and shipping time (if defined) from the warehouse to the customer.
 - If no shipping time can be determined, Schedule Ship Date and Schedule Arrival Date are the same.

Options for Dates within the OM Suite

- Schedule Arrival Date (cont.)
 - Description (cont.):
 - Please note that if ATP is used to schedule lines, the system will only allow entry of a Schedule Arrival Date that violates the ATP calculation if the profile option “OM: Authorized to Override ATP” is set to yes for the user.

Options for Dates within the OM Suite

- Schedule Arrival Date (cont.)
 - Header/ Line
 - Schedule Arrival Date is at the line level.
 - Defaulting:
 - There are defaulting rules available for Schedule Arrival Date, however it is recommended to not invoke these, and let the system calculate the dates as described above.
 - Query:
 - Scheduled Arrival Date may be queried as a range via the Order Organizer, Line Information tab or via the Scheduling Organizer.

Options for Dates within the OM Suite

- Actual Ship Date
 - Description:
 - Actual Ship Date is the date that the order line is ship-confirmed in the system, and represents the date the product left the warehouse for delivery to the customer.
 - Header/ Line
 - Actual Ship Date is at the line level.
 - Defaulting:
 - There are no defaulting rules for Actual Ship Date, as it is determined by Shipping.

Options for Dates within the OM Suite

- Actual Ship Date (cont.)
 - Query:
 - Actual Ship Date cannot be queried through the Order Organizer or Scheduling Organizer.

Options for Dates within the OM Suite

- Actual Arrival Date
 - Description:
 - Actual Arrival Date is the date that represents the date the product was delivered to the customer site.
 - Header/ Line
 - Actual Arrival Date is at the line level.
 - Defaulting:
 - There are no defaulting rules for Actual Ship Date, as it is entered by during the Shipping process.

Options for Dates within the OM Suite

- Actual Arrival Date (cont.)
 - Query:
 - Actual Arrival Date cannot be queried through the Order Organizer or Scheduling Organizer.

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- **Shipping Execution Dates**

- **Delivery Line Dates**

- Schedule Date represents the scheduled ship / arrival date determined in Order Management.
 - Pick-Up Date represents the date that the Delivery Line is scheduled for pick up at the warehouse by the freight carrier.

- **Delivery Dates**

- Pick-Up Date represents the date that the Delivery is scheduled for pick up at the warehouse by the freight carrier.
 - Drop-Off Date represents the date that the Delivery will be made to the customer's site.

Options for Dates within the OM Suite

- Shipping Execution Dates (cont.)
 - Trip-Stop Dates
 - Arrival Date represents the date that the carrier is scheduled to arrive at the specific Trip-Stop. This may or may not represent a drop off of product to a customer.
 - Departure Date represents the date that the carrier is scheduled to leave the location defined by the Trip-Stop.

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Options for Dates within the OM Suite

- Order Management to Shipping Date Matrix

- | Order Mgt Date | Shipping Date |
|--------------------------|---|
| Request Date | Date Requested |
| Earliest Acceptable Date | Earliest Delivery/ Ship Date
Ultimate Ship to/ Drop-off Date |
| Latest Acceptable Date | Latest Delivery/ Ship Date |
| Schedule Ship Date | Date Scheduled
Planned Departure Date |
| Scheduled Arrival Date | Planned Arrival Date |

Options for Dates within the OM Suite

- Date Matrix (cont.)

Order Mgt Date	Shipping Date
Actual Arrival Date	Actual Arrival Date
Actual Shipment Date	Actual Departure Date Confirm Date Future Ship Date Initial Ship From/ Pick-up Date

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Options for Dates within the OM Suite

- Conclusion
 - Order Management and Shipping Execution are two applications within the E-Business Suite that provide information critical to managing the customer relationship.
 - Increasing customer satisfaction and loyalty are often a case of meeting customer expectations for fulfillment of orders, and also of providing detailed information about all the steps in the order fulfillment process.

Options for Dates within the OM Suite

- Conclusion (cont.)
 - The abundance of dates within the Order Management and Shipping Execution modules allows capture of the information that can help in the following ways:
 - Maintain on-time shipping
 - Reduce order to fulfillment times
 - Increase the accuracy of promised delivery dates
 - Increase the flexibility with which orders may be priced.

Options for Dates within the OM Suite

Questions?