

PeopleSoft Order Management



PeopleSoft Order Management is an order-to-cash solution that enables customers, partners, and employees to select the right products and services, negotiate the best prices, and ensure timely fulfillment.

KEY FEATURES

- Ability to create and view orders from multiple business units without changing forms or windows
- Alternate options for sources of supply if product is not readily available
- Header attribute changes cascade to line automatically or by user choice
- Support for multiple payment methods in the same order
- Ability to calculate and capture deposits required in an order if payment terms dictate prepayment
- Honoring of credit holds across business units
- Margin visibility and target margin input for attaining desired margin goals
- Automatic application of Buying Agreement terms and pricing
- Automatic application of Pricing Rules based on user-defined combinations of order conditions and formulas with embedded Enterprise Pricer module
- Support for customer returns with Return Material Authorizations
- Personalizations that enable users to indicate how they want to interact with the order and quote entry pages
- Global support for denied parties screening, VAT processing, multicurrency, and multi-language

Improve Operational Efficiency for Your Order-to-Cash Process

PeopleSoft Order Management's quote-to-cash process consists of three main tasks:

- Capturing the perfect Order, which consists of functions such as product selection, pricing, promotions, and cross and upsell opportunities.
- Orchestrating flawless fulfillment that consists of advanced logic to determine how a specific order or order line should be processed.
- Executing timely fulfillment that requires order information to flow seamlessly to Manufacturing, Inventory, Procurement, and third-party warehouse management systems.

The PeopleSoft Order Management and Shipping Execution solution allows the creation of an integrated, seamless, order-to-cash process across these three steps by providing the following capabilities:

- Accurate capture of customer orders across multiple channels.
- Streamlined orchestration of order details for seamless fulfillment execution.
- Communication and visibility of order status information to customers throughout the order life cycle.
- Efficient freight shipping and shipment planning execution

The integrated order-to-cash process provided by PeopleSoft Order Management enables companies to realize benefits that include:

- *Enhanced customer experience* through the selection of the right product at the right price plus accurate supply visibility, including alternate sourcing and automatic order status updates from fulfillment systems to multiple channels.

KEY BENEFITS

- Enhanced customer service
- Reduced order processing costs
- Increased revenue
- *Reduced operational costs* through faster order entry, reduced order errors, and reduced manual steps for fulfillment processing.
- *Increased revenue* through margin maximization and faster order fulfillment.

Enhance Customer Service**Select the Right Product at the Right Price from the Right Fulfillment Center**

PeopleSoft Order Management works seamlessly with the PeopleSoft Inventory, Purchasing, and Pricing applications. PeopleSoft Enterprise Pricer functionality extends Order Management's pricing capabilities with an engine that applies correct prices, terms, and discounts to every order line, including orders based on negotiated Buying Agreements. Order Management enables you to define Product Catalogs to control who can order what goods and services. PeopleSoft Inventory provides visibility into on-hand and incoming stock so customer service levels can be attained with on-time fulfillment and shipment. When a product is not available, users may request a purchase be made specifically for the customer order through a seamless integration with PeopleSoft Purchasing.

Reduce Errors and Delays Through Order Validation and Automatic Defaulting

PeopleSoft Order Management enables you to validate an order during the capture process and ensures that the order has all the necessary and correct information to be processed for fulfillment without errors. Order Management also provides a flexible defaulting capability to provide automatic order data such as payment, carrier, and shipping information to reduce the likelihood of data entry error. This validation not only supports sales orders, it also governs other orders supporting order modifications, cancellations, and returns.

Provide Accurate Order Promise Dates

PeopleSoft Order Management works with the Inventory, Manufacturing, and Procurement solutions to create consistently reliable delivery promise dates. Inventory can be immediately reserved at order entry or automatically as the requested ship date moves within the allocation window. If material is not readily available in the customer's distribution network, alternate sourcing options are available to get the product to the customer in a timely manner. Sources of supply could be incoming Purchase Orders or Production Orders or, if allowed, the CSR or salesperson can create supply to fulfill the order demand.

RELATED PRODUCTS

The following products integrate with PeopleSoft Order Management:

- PeopleSoft Enterprise Pricer
- PeopleSoft Inventory
- PeopleSoft Purchasing
- PeopleSoft Manufacturing
- PeopleSoft Project Costing
- PeopleSoft Billing
- PeopleSoft Accounts Receivable
- PeopleSoft Customer Relationship Management

RELATED SERVICES

The following services support Oracle PeopleSoft Order Management:

- Update Subscription Services
- Product Support Services
- Professional Services

Provide Timely Order Fulfillment with Direct Shipments

PeopleSoft Order Management can be easily configured to support fulfilling customer orders by directly shipping the goods from Suppliers to the end customer. Customer sales orders are seamlessly communicated from PeopleSoft Order Management to PeopleSoft procurement and on to the Supplier. Customer changes to the sales order and Supplier changes to the Purchase Order are synchronized to enable real-time order status updates and inquiries. Once the Supplier communicates the Advanced Shipping Notice (ASN) electronically or through web self-service, the customer can be invoiced.

Increase Throughput Efficiency with Electronic Capture from Any System

Companies receive orders from multiple systems, including web stores, third-party systems, and outsourced call centers. The PeopleSoft Order Management architecture is designed to capture from all of these sources efficiently. The system can also batch import orders in EDI or XML formats. Self-service access to order information, invoices, and delivery status is also available.

Automate Complex Order Processing with Flexible Business Process Support

PeopleSoft Order Management and PeopleSoft Inventory shipping provide the flexibility to model and execute any sales order, picking, or shipping process. The application provides options for order capture, fulfillment, invoicing, and payment in a single transaction. In addition, Order Management integrates with the PeopleSoft Manufacturing applications to support configure-to-order manufacturing, logistics-based fulfillment, and services (non-stock products) fulfillment. The flexible framework facilitates adding steps that are specific to your business or creating new business flows. Standard out-of-the-box alerts monitor and identify flaws or bottlenecks in the fulfillment process so that proactive actions can be taken.

Increase Revenue Margin Enforcement

PeopleSoft Order Management enables you to set up margin thresholds, create margin violation order holds, and view margins during order entry. This capability ensures that orders meet profitability goals and enables products to be allocated to highest margin orders and order lines. In addition, users with authority to do so can enter a target margin percentage, margin amount, or order amount and the system will recalculate pricing on each

order line to attempt to attain the desired margin goal. At the same time, minimum selling prices, margin thresholds, and discount and surcharge rules are observed to ensure no margin violations.

Decrease Time-to-Revenue Through Automated Fulfillment

PeopleSoft Order Management leverages Inventory Shipping execution to automate all shipping-related processes, including picking, packing, and shipping confirmation. Companies can enable Auto-Pick, Auto-Pack, and Auto-Ship individually or in combination. Shipping execution automatically groups sales order lines into consolidated deliveries to minimize shipping and handling costs. Integration with a third-party Warehouse Management System (WMS) adds resource and labor optimization capabilities, such as wave picking and RFID. Freight shopping capabilities enable users to shop for freight carriers based on best way, lowest cost, or both.

Proactively Monitor Order and Customer Service Bottlenecks

PeopleSoft Order Management users can leverage the Messaging and Alerts framework with out-of-the-box alerts notifying them when certain service levels are threatened. A series of proactive notifications will notify individuals or groups of individuals of “Orders Past Their Scheduled Shipment Date,” “Aged Orders on Hold,” and other important information that signals a potential bottleneck in the fulfillment cycle. Customer Service users may access and personalize a Dashboard to monitor conditions they deem important so they may extend the highest level of service to their customers.



Figure 1. Proactive monitoring of Overdue Demand



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Hardware and Software, Engineered to Work Together

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