Oracle Modern Best Practice
Digital Business Processes for Supply Chain Management
Safe harbor statement

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What is Oracle Modern Best Practice?
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Digital business processes that evolve with you
End-to-end across the organization

Radically superior results
Leverages emerging technologies
240+
Open, Standard, Free

Finance • Plan to Approval • Asset Acquisition to Retirement • Bank Transaction to Cash Position • Expense Report to Reimbursement • Supplier Invoice to Payment • Customer Invoice to Receipt • Customer Statement to Collection • Period Close to Financial Reports • Report to Forecast • Customer Contract to Revenue • Joint Venture Accounting to Stakeholder Settlement • Period Close to Tax Provision • Tax Provision to Statutory Filing • Lease Abstraction to Termination

Procurement • Supplier Registration to Spend Authorization • Insight to Sourcing • Contract Creation to Spend Compliance • Requisition to Payment • Supplier Return to Settlement

Project Management • Plan to Delivery • Project Contract Billing to Revenue Recognition • Project Cost to Accounting • Resource Analysis to Utilization

Risk Management • Security Design to Separation of Duties • Business Process Risk to Continuous Assurance • Audit Scoping to Financial Reporting Compliance • Risk Identification to Organization Readiness

Talent • Recruit to Onboard • Benefits to Payroll • Time Collection to Payroll • Payroll to Payment • Goal Setting to Performance Improvement • Career Planning to Development • Talent Review to Succession • Absence Planning to Productivity Improvement • Incident Report to Workplace Safety • Employee Insight to Workforce Wellness • Employee Separation to Workforce Analysis

Marketing • Data signals to Unified Profiles • Campaign Execute to Lead • Nurture to Opportunity

Sales • Lead to Opportunity • Opportunity to Quote • Quote to Order • Opportunity to Forecast • Sales Play to Key Account Opportunity • Field Sales Prep to Execution • Vendor Lead to Channel Opportunity • Channel Lead to Vendor Opportunity

Sales Performance Management • Sales Strategy to Execution • Coaching Plan to Performance • Incentive Plan to Payment

Service • Customer Contact to Resolution • Service Request to Dispatch • Knowledge Gap to Solution • Sensor Alert to Preventive Maintenance

Product Information • Product release to supply chain readiness • New product to omnichannel commerce • Dispersed item records to unified master

Supply Chain Planning • Sales Objective to Integrated Business Plan • Demand to Management • Demand Forecast to Supply Plan

Logistics • Outbound Shipment to Delivery • Inbound Shipment to Delivery • Freight Invoice to Approval • Trade Screening to Compliance

Order Management • Multi-channel Order to Promise • Fulfillment Orchestration to Invoice • Order to Drop Shipment

Manufacturing • Forecast to Plan • Production Order to Cost Update • Contract Manufacturing Request to Delivery

Inventory • Plan to replenish • Material request to delivery

Product Lifecycle • Design to Release • Part Qualification to Release • Quality Event to Resolution • Part Qualification to Release • Quality Planning to Receiving Inspection

Industry: Retail • Government • Higher Education • Insurance • Banking • Healthcare • Energy and Water
Oracle Modern Best Practice for SCM

Innovation
- Social Monitoring to Idea Capture
- Idea Capture to Business Case
- Requirement Definition to Delivery
- Concept Formation to Design
- Design to Release
- Product Proposal to Go-to-market Candidate
- Portfolio Review to Selections

Product Information
- Product Release to Supply Chain Readiness
- New Product to Omnichannel Commerce
- Dispersed Item Records to Unified Master

Supply Chain Planning
- Sales Objective to Integrated Business Plan
- Demand to Management
- Demand Forecast to Supply Plan

Procurement
- Supplier Registration to Spend Authorization
- Insight to Sourcing
- Contract Creation to Procurement Compliance
- Requisition to Payment
- Supplier Invoice to Payment
- Supplier Return To Settlement

Manufacturing
- Forecast to Plan
- Production Order to Cost Update
- Contract Manufacturing Request to Delivery

Inventory
- Plan to Replenish
- Material Request to Delivery

Order Management
- Quote to Order
- Multichannel Order to Promise
- Fulfillment Orchestration to Invoice
- Order to Drop Shipment
- Customer Invoice to Receipt

Logistics
- Lane Forecast to Carrier Contract
- Inbound Shipment to Delivery
- Outbound Shipment to Delivery
- Freight Invoice to Approval

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Oracle Modern Best Practice for Innovation
Social Monitoring to Idea Capture

- **Social monitoring**
  Monitor social networks, blogs, forums, etc. to collect and understand the competitive landscape, knowledge, issues, and demands of the target audience, and to identify new markets.

- **Sift and rank**
  Filter relevant posts automatically from the social web to identify trends, themes, and categories. Identify and rank sentiments about products and services.

- **Analyze trends**
  Analyze trends and distill insights that mutually benefit the company and customers.

- **Gather detail**
  Collaborate with social participants for clarification via original interaction threads or through secure social platforms.

- **Capture ideas**
  Bring ideas into internal development, evaluation, and qualification process.

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Product Mix: SCM Cloud (PLM), Marketing Cloud
Popular KPIs: no. of ideas captured, cost per idea captured
Idea Capture to Business Case

Idea collection
Capture organization or customer knowledge for new products, product derivatives, new services, process improvements, etc. via unstructured data via social networks (Twitter, Facebook, etc.) and blogs, etc.

Enhance ideas
Foster internal and external collaboration with secure interactions. Enrich idea with existing content.

Analyze ideas
Review ideas. Insight-driven, dashboard-driven determination of the need for more information.

Prioritize ideas
Vote on ideas based on value, suitability, acceptability, feasibility, endurance and alignment with business objectives.

Build business case
Initiate business review process on secure social network for approved Idea(s).

Product Mix: SCM Cloud (PLM), Marketing Cloud
Popular KPIs: no. of idea proposed vs. approved, cist per approved idea
**Requirement Definition to Delivery**

- **Evaluate ideas**
  Prioritize ideas captured from sources including customer, quality, and social media. Allocate resources accordingly.

- **Define requirements and associated tests**
  Collaborate among domain experts and stakeholders to define requirements and test cases via secure social interaction. Foster reuse with easy search and copy.

- **Determine product scope**
  Ensure requirement clarity among stakeholders and confirm feasibility with the design team via secure social platform. Reach the product scope using insight-driven analysis.

- **Optimize requirements**
  Balance goals among time-to-market, product features, and resources by reviewing early designs to refine/right-size in-scope requirements. Add/drop requirements using trade-off analysis.

- **Manage traceability**
  Throughout development stage, maintain associations between designs and intended requirements. Analyze change impact among dependencies using easy to navigate Traceability Matrix.

- **Monitor fulfillment**
  Capture fulfillment decision process and supporting details via secure social network. Analyze impact of requirement change on scope, schedule, and cost via dashboard.

- **Verify and validate**
  Dashboard driven analysis of Traceability Report to validate the right product is being built and verify the product is being built right. Ensure the test criteria are consistent for all requirements.

- **Confirm delivery**
  Release the product for production or next stage development. Automate approval routing based on business/regulatory policy.

**Product Mix:** SCM Cloud (PLM)

**Popular KPIs:** % ideas reaching next stage, time from idea to decision, cost per idea development.
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Concept Formation to Design

Gather ideas
Review data and collect ideas and requirements across the enterprise, using secure unstructured data via social networks (twitter, Facebook, etc.) and blogs, etc. Manage stakeholder compliance

Develop concepts
Introduce new designs and leverage proven designs. Insight-driven requirement tracking and management of requirements met by the designs

Estimate costs
Develop a cost estimate. Rollup concept costs and measure against target cost in role-based dashboards

Create concept
Alternatives
Develop what-if scenarios for distinct market segments, countries, or regions

Validate concept
Ensure each alternative meets must-have requirements and cost objectives with secure team interactions

Arrive at best-fit design(s)
Evaluate trade-off between feature and cost by using analytic dashboards. Select winning design(s) for funding and product development

Advance design(s)
Promote to the product record for refinement or commercialization on any devices

Product Mix: SCM Cloud (PLM)
Popular KPIs: cost per design, time from idea to design
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Design to Release

Review Product Design
Establish a baseline by consolidating works carried over from the idea capture process. Initiate a new project or link to existing projects to track development progress and costs.

Develop Product
Manage product changes with change orders using rule-based assignments and dashboards. Centralize tracking on product revisions, associated design documents, and extended collateral. Collaborate throughout the product lifecycle across the organization and with suppliers.

Collaborate with Suppliers
Work with suppliers on developing new or improving existing products. Maintain centralized records on qualified parts and suppliers. Streamline communication with a secure portal. Engage new suppliers if needed.

Establish Product Costs
Perform simple cost roll-ups on subassemblies and top-level products to ensure the product design meets cost targets.

Evaluate Readiness
Assess product readiness using criteria such as missing item costs, missing item suppliers, and by ensuring parts and final products are fully compliant with standards. Improve quality by monitoring processes using dashboards, alerts, and business rule compliance on any device.

Release to Production
Release new products to downstream activities and systems. Route tasks and approvals based on preset business rules. Collaborate across the organization to continue go-to-market activities.

Product Mix: SCM Cloud (PLM)
Popular KPIs: prototype annual cost, avg time from design to production

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Product Proposal to Go-to-Market Candidate

- **Initiate product proposals**

- **Model cash flow/resources**
  Model with what-if scenarios concerning expected revenue stream compared to expenditure schedule. Identify needed resource pools and schedules.

- **Analyze best proposals**
  Monitor project deliverables via role-based dashboards. Kill portfolios early which are over budget, under resourced, or off schedule.

- **Select go-to-market candidate**
  Determine Best Proposal. Submit for management approval from a desktop, smart phone, or tablet.

**Product Mix:** SCM Cloud (PLM), EPM Cloud (Planning)

**Popular KPIs:** % approved proposals, cost per proposal analysis, revenue estimated vs. actual

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Portfolio Review to Selection

**Review portfolio**
Define goals and expected results of portfolio. Setup evaluation metrics on role-based dashboards.

**Model what-if scenarios**
Create as many scenarios as desired. Search/add existing product proposals. Enrich copy of the proposal with missing or corrected information via secured interactions.

**Analyze portfolio**
Review risk/reward objective and resource constraints. Insight-driven evaluation of Mix Risk concerning various proposals.

**Align product development**
Track budget, resource, and schedule and analyze impact and correction if off track with role-based dashboards. Ensure documents and materials are in place.

**Select portfolio**
Compare scenarios. Route portfolio for approval. Adjust funding for performance and objective fit with Insight-driven analysis.

Product Mix: SCM Cloud (PLM), EPM Cloud (Planning)
Popular KPIs: cost per review, portfolio performance before vs. after review.

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Oracle Modern Best Practice for Product Information
**Release design for production**
Manage sign-off process and monitor status via dashboards. Simplify check-list task coordination among stakeholders via secure social collaboration.

**Onboard released products**
Add the new product, component, and structure definitions to the centralized enterprise depository. Automatically validate the data based on preset rules and notify exceptions.

**Add supply chain attributes**
Collaborate to set item classification and parameters governing production, purchasing, and fulfillment. Maintain facility specific variations. Route tasks and approvals to relevant stakeholders.

**Ensure product readiness**
Automatically validate product data using pre-configured criteria. Review and approve exceptions using rule-based task routing and dashboard. Resolve issues via secure social collaboration.

**Propagate product information**
Propagate product records to designated organizations including warehouses and plants. Automatically synchronize updates from the master.

**Manage on-going changes**
Adjust item definitions and policies for new requirements. Enforce change control process based on preset rules.

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*Product Mix: SCM Cloud (Product Master Data Management)*
Popular KPIs: new product setup cycle time, % of products with missing data
New Product to Omnichannel Commerce

**Onboard new products**
Add new products released from in-house development or sent by suppliers to centralized repository.

**Validate data quality**
Automatically check data validity such as completeness and formatting based on preset rules. Send exception notification to stakeholders.

**Enrich product information**
Collaborate to produce sales and marketing content including product collateral and catalogs for different channels and languages. Route tasks and approval to relevant stakeholders.

**Ensure product readiness**
Automatically validate product data using pre-configured criteria. Streamline exception review and approval using rule-based task routing and dashboard. Resolve issues via secure social collaboration.

**Propagate to channels**
Automatically release approved product records to consuming channels including web store, mobile APP, retail POS, customer service, partner, and distributor.

**Manage on-going changes**
Update item definitions and assets for new requirements. Enforce change control process based on preset rules.

Product Mix: SCM Cloud (Product Master Data Management)
Popular KPIs: cycle time to rollout new product catalog, % of products with missing data.
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Dispersed Item Records to Unified Master

- **Review item records**
  - Review item definitions from new entities arising from M&A, new facilities, new partners, etc.

- **Propagate product information**
  - Refresh item data in new entities with master records and automatically synchronize updates from master.

- **Standardize item definition**
  - Determine common data attributes and definition. Facilitate stakeholder collaboration using secure social interaction.

- **Manage on-going activities**
  - Add, delete, or modify master item definition to meet the demands from new business requirements.

- **Establish data governance**
  - Securely collaborate among stakeholders to configure business rules including validation and classification, change control processes, and approval routing.

- **Incorporate new items**
  - Add products from new entities to master and centralize subsequent data management following defined governance.
Oracle Modern Best Practice for Supply Chain Planning
Sales Objective to Integrated Business Plan

**Determine sales objectives**
Identify sales targets needed for financial goals using what-if analysis. Leverage machine learning to uncover insights on pattern, causality, and historical biases.

**Review product mix**
Assess product portfolio using centralized dashboard. Get revenue history, forecast, and KPIs such as product vitality for decisions on product introduction or retirement.

**Plan demand**
Generate unconstrained plans and compare them with financial forecast using graphical analysis. Collaborate among stakeholders to address gaps over secure social platform.

**Plan supply**
Review problem areas on a dashboard and drill down to root causes. Leverage secure social collaboration to address supply constraints and shape demand to balance capacity. Identify alternatives using what-if simulation.

**Align financial goals**
Evaluate costs/benefits of the revised operation plans to ensure alignment with financial/business goals. Use a centralized dashboard to compare the financial impact from different options. Revise budget if needed.

**Management approval**
Review proposed options on a dashboard highlighting the key differences among the alternatives. Automatically route approval/review based on preset rules. Communicate the decision to stakeholders.

**Execute plan**
Automatically transfer plans to Production, Procurement, and Warehouse for tactical planning and execution.

**Monitor performance**
Use a dashboard to compare plan and actual data including sales orders, shipments, POs, and production orders. Improve planning accuracy with new insights.

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Product Mix: EPM Cloud (Planning), SCM Cloud (Supply Chain Planning, Collaboration and Visibility, Supply Chain Analytics)
Popular KPIs: planning duration, plan vs. actual

Cloud | Mobile | Analytics | Collaboration | AI/ML
Demand to Management

**Compile data**
Compile demand data such as order and shipment history, seasonal patterns, and regional variation. Include external signals such as syndicated data and social postings. Get qualitative inputs including market insights and competitive landscape changes from stakeholders over secure social conversation.

**Sense demand**
Automatically detect outliers, fill data gaps, and select the right level of detail and combination of statistical methods to minimize forecast error. Uncover invisible patterns with machine learning. Visually analyze the impact of baseline and causal factors.

**Incorporate product decisions (optional)**
Use what-if modeling to simulate the impact of decisions such as new product introduction, pricing change, end-of-life, and marketing campaign. Easily compare forecast scenarios via dashboard.

**Generate forecasts**
Generate forecasts by product category, market segment, etc. Get customer/channel input via secure portal. Achieve consensus forecasts with internal stakeholders over secure social collaboration.

**Review supply impact**
Automatically adjust required inventory, capacity and material supply based on demand plans. Collaborate with stakeholders to address supply issues.

**Shape planning outcomes**
Uncover insights and improve planning accuracy with machine learning. Resolve chronic issues via error and variability analysis.

**Product Mix: SCM Cloud (Supply Chain Planning, Collaboration and Visibility)**
Popular KPIs: forecast vs. actual demand, MAPE (mean and absolute percentage error)
Oracle Modern Best Practice

Demand Forecast to Supply Plan

Forecast demand
Enhance demand insight by incorporating real-time social signals and syndicated data with order and shipment history. Achieve consensus forecast with internal stakeholders over secure social collaboration.

Plan supply
Automatically determine resource and material requirements based on current demand, material availability, manufacturing capacity, and supplier commitments.

Identify supply issues
Automatically highlight and prioritize exceptions such as order backlogs, material shortfalls, and resource overloads based on their impact. Drill down to root causes.

Address supply issues
Get guided resolution advice on a centralized dashboard. Add and adjust buy, make, or transfer orders and sync with Demand team to address hot demand, pull-in demand, and at-risk demand. Compare multiple simulations for best action.

Release orders
Review supply and demand pegging and assess build plans to prioritize supply orders for release to execution systems. Automatically release routine buy, make, or move orders.

Monitor plan performance
Monitor status of the release supply orders to assess plan accuracy. Easily track KPIs and get exception alerts on dashboard.

Product Mix: SCM Cloud (Supply Chain Planning, Collaboration and Visibility)
Popular KPIs: duration between plan to release, order fill rate

Cloud Mobile Analytics Collaboration
Oracle Modern Best Practice for Procurement
Supplier Registration to Spend Authorization

Register Prospective Supplier
Send secured links or set up a public landing page to collect prospective supplier company profiles and product or service data in a structured format. Leverage business data services to ensure record consistency and accuracy. Use questionnaires to capture responses to additional registration questions.

Review and Approve Registration
Streamline approval review by automatically routing registration requests to reviewers based on business rules. Incorporate supplier intelligence services for up-to-date scoring and risk signals, such as organization turnover and financial performance.

Evaluate Supplier Qualifications

Authorize for Spending
Automatically add qualifications to supplier records. Confirm supplier readiness, including remittance bank accounts, system access privileges, and compliance acknowledgements.

Begin Transacting
Suppliers share information, participate in sourcing events, advise of changes on purchase orders, and manage invoices and payments using a secure portal.

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Product Mix: Cloud ERP (Procurement)
Popular KPIs: avg. person-hour to qualify a supplier, no. of suppliers per category or critical item

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Insight to Sourcing

**Identify Opportunity**
Focus on high-impact opportunities by analyzing spending patterns and supplier performance.

**Create Sourcing Event**
Ensure policy-compliant negotiations through step-by-step guidance and templates. Leverage question library or author new requirements to align with business needs. Publish events to invite suppliers for participation.

**Engage with Suppliers**
Provide suppliers with a centralized portal to access and monitor sourcing activities, post messages, and submit responses either online or using a spreadsheet.

**Monitor Negotiation**
Get up-to-date event progress using a dashboard to review supplier responses and activities and compare submissions. Extend, pause, or close the event based on responses.

**Evaluate and Award Negotiation**
Streamline decision-making with detailed analysis and comparison of supplier responses and consolidated scoring from subject matter experts. Automatically notify suppliers of award decisions.

**Finalize Contract**
Streamline contract creation by automatically applying terms and conditions from negotiation events and exception-based approvals. Finalize contract terms and conditions and create purchase documents to track fulfillment activities.

**Realize Savings**
Automatically apply pricing and terms to covered purchases to maximize contract savings. Track sourcing programs and measure performance against predefined sourcing goals using dashboards.

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**Product Mix:** Cloud ERP (Procurement)
**Popular KPIs:** Non-contract purchase rate, price savings amount
Oracle Modern Best Practice

Contract Creation to Procurement Compliance

Author Contracts
Create contracts through guided authoring or by assembling preapproved standard terms and conditions. Maintain contract quality with templates formatted for consistent printing and electronic transmission.

Manage Deviations
Capture revisions during authoring and negotiation. Enforce policy compliance with mandatory validation and approval. Automatically recognize important deviations from standard policies and route for approval.

Approve and Accept Contracts
Route contracts through the approval hierarchy based on preset rules. Manage electronic signatures.

Apply to Purchasing Agreements
Easily locate governing contracts using secure search to cover applicable execution documents, such as agreements and purchase orders.

Promote Compliance
Publish goods and services covered by contracts on a procurement portal to promote utilization. Automate order creation from contracted suppliers with risk controls to spot potential fraud. Use dashboards to obtain visibility into contract utilization, terms, value leakage, and KPIs.

Product Mix: Cloud ERP (Procurement, Risk Management)
Popular KPIs: Price change amount, contract leakage rate

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Requisition to Payment

Create Requisitions
Quickly find needed goods and services from approved catalogs with consumer-friendly user interface on any device.

Approve Requisitions
Automatically route requisitions for approval based on predefined business rules, including thresholds, reporting hierarchies, and purchasing categories. Review and approve requisitions on any device. Enforce separation of duties (SoD) rules and monitor violations.

Create Purchase Orders
Automate purchase order creation for approved suppliers based on negotiated pricing and contract terms.

Approve Purchase Orders (optional)
Automatically route purchase orders for approval based on predefined business rules.

Dispatch Purchase Orders
Automatically deliver approved purchase orders over secure electronic channels or supplier portals.

Receive Goods and Services
Record goods and services received to trigger automated accounts payable matching.

Manage Invoices
Receive supplier invoices over secure electronic channels or supplier portals. Leverage machine learning to recognize scanned or printed formats. Automate invoice approval based on predefined business rules. Handle exceptions and manual approval on any device.

Process Payments
Optimize payment timing and discounts based on business goals. Process electronic payments, automated pay runs, or off-cycle payments.

Product Mix: Cloud ERP (Procurement, Risk Management, Financials)
Popular KPIs: processing cost per purchase order, procurement cycle time
Supplier Invoice to Payment

Manage Supplier Invoices
Process electronically or scan invoices with rule-driven routing to automate invoice processing. Use spreadsheets to speed up manual entry. Automatically raise alerts on separation of duties (SoD) violations or unusual supplier relationship.

Manage Audits, Disputes, And Approvals
Match invoices to required documents including purchase orders, receipts, inspection acceptance, and VMI consumption. Manage rules-driven approvals across any device or desktop. Resolve disputes and holds via a role-based dashboard and secure social interaction.

Manage Prepayments And Discounts
Optimize payment timing and discounts based on business goals and supplier intelligence from transaction history and real-time events. Manage prepayments on any devices. Automatically detect unusual or fraudulent payments.

Settle Liabilities
Actively monitor and process supplier and statutory liabilities via secure interaction. Process electronic payments, automated pay runs, or off-cycle payments.

Review Daily Activity
Review and analyze the day's financial activity and monthly progress.

Schedule Payables Close
Stay on predetermined close schedule. Review payables register, trial balance, and reconciliation reports. Close payables period.

Product Mix: Cloud ERP (Financials, Risk Management)
Popular KPI: no. of payments, invoice payment days, % discount taken
Supplier Return to Settlement

Request RMA
Contact supplier to authorize return. Enter return shipment and record RMA information

Prepare Material For Shipment
Consolidate and pack material to be returned for credit. Use IoT devices to track material status

Load Material
Load the prepared material to the dock for shipment. Enable real-time tracking with IoT devices

Ship Material
Ship material to be returned and notify supplier electronically. Communicate shipment location and status via IoT devices

Receive Material – Supplier (Optional)
Receive replacement materials from suppliers to inventory or specified location

Record Returns Transactions
Settle outstanding balance with supplier. Record returns for supplier performance analysis

Product Mix: Cloud ERP (Procurement)
Popular KPIs: return amount, no of return transactions
Oracle Modern Best Practice for Manufacturing
Forecast to Plan

Set planning objectives
Securely collaborate among stakeholders to define the planning options and exception thresholds that best support revenue, utilization, and throughput objectives.

Sense demand
Detect market changes by integrating real-time demand signals with historical data. Gain a consensus view of future demand via statistical forecasting and cross-functional teamwork.

Plan supply
Determine resource and material requirements based on current demand, material availability, manufacturing capacity, and supplier commitments.

Analyze demand and supply changes
Determine and prioritize resource and material exceptions. Analyze/drill down to find the root cause of demand and supply issues. Collaborate to identify performance opportunities.

Address supply issues
Get plan change suggestions that maximize revenue and minimize disruptions. Add/adjust buy, make, or transfer orders to address hot demand, pull-in demand, and demand at risk. Simulate plan changes to compare results.

Release supply orders
Review supply/demand pegging and assess build plans to prioritize supply orders for release. Automatically release routine buy, make, or move orders.

Product Mix: SCM Cloud (Supply Chain Planning)
Popular KPIs: % shortfall of planned items, demand forecast vs. actual.
Production Order to Cost Update

Manage work orders
Automatically create work orders from sale orders and planning results. Get alerts for potential issues e.g., equipment failure. Review suggested actions. Manage production, monitor progress, and review performance on any device.

Issue material
Reserve needed parts and move them to shop floor. Expedite material movements and lot/serial number recording with sensors and/or manual entry on mobile devices.

Perform work operations
Record required details such as duration, material usage, and incurred scraps on any device. Get notifications on operation anomalies and suggestions on course of action. Resolve production issues through social collaboration.

Complete work orders
Record completion of work orders and other production tasks via sensors or streamlined UI optimized for mobile devices.

Record material consumption
Automatically back flush non-tracking materials. Record lot/serial numbers on any device if not done during issue.

Update and analyze cost
Automatically post consumed material, labor, and other resources for actual cost-based items. Analyze production costs to ensure profitability.

Product Mix: SCM Cloud (Manufacturing, Internet of Things)
Popular KPIs: production quantity planned vs. actual, production time planned vs. actual.
Contract Manufacturing Request to Delivery

- **Contract manufacturing production request**
  Automatically create purchase orders to contract (outsourced) producers from customer orders or planning outcome. Reserve production for intended sales orders.

- **Issue material (optional)**
  Record serial/lot numbers if tracked. Optimize shipments of components to contract facilities. Get alerts for potential delays and notify the production facilities via secure trusted network.

- **Monitor progress**
  Review production milestone update, receive exception alerts, and get recommended course of action from a centralized dashboard on any device.

- **Handle exceptions**
  Review suggestions and address issues via secure collaboration. Allow quantity changes based on business rules. Adjust completion date if needed.

- **Complete production**
  Record work order completion and trigger status update on purchase order and sales order. Log consumption of tracked material. Review production performance and anomalies.

- **Deliver finished goods**
  Optimize shipments of finished goods to fulfillment warehouse or customer. Update sales order and provide tracking information.

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Product Mix: SCM Cloud (Manufacturing, Blockchain, Internet of Things, Supply Chain Collaboration and Visibility)

Popular KPIs: % on-time delivery, component usage planned vs. actual
Oracle Modern Best Practice for Inventory
Plan to Replenish

**Review usage data**
Determine optimal stock levels by analyzing consumption history and usage patterns vs. forecast. Incorporate line of business insights such as upcoming promotions via secure collaboration.

**Identify replenishment sources**
Determine best-fit internal and external sources based on factors such as price, lead time, and minimum order quantity.

**Establish planning policies**
Assign planning methods and corresponding parameters such as min-max and order size to managed items.

**Execute inventory plans**
Trigger replenishment actions and alert stakeholders when on-hand quantities fall below set minimum. Monitor material transactions and adjust planning parameters as usage patterns change.

**Generate replenishment orders**
Automatically create transfer orders, purchase orders, or work orders with quantities based on the assigned planning parameters.
Material Request to Delivery

Manage material requests
Create, update, and review material requests including transfer orders and internal employee requests from dashboards on any devices.

Process material requests
Pick, pack, and prepare material for shipment at the source warehouse. Allow partial shipments based on availability.

Ship material
Optimize shipments to the destinations. Update order status and expected arrival date automatically.

Generate trading documents (optional)
Automatically create internal trade documents such as intercompany PO and invoices independent of material movement for taxation benefit or regulatory compliance.

Record delivery
Deliver goods to requesters or receive and store material at the destination according to receipt routing rules. Close requests and automatically allocate incurred costs including freight, insurance, and duty.

Product Mix: SCM Cloud (Inventory Management)
Popular KPIs: inventory turnover, average fulfillment cost per order.
Oracle Modern Best Practice for Order Management
Oracle Modern Best Practice

Quote to Order

- Identify Opportunity
  Identify proposal-ready accounts with dashboard-driven review of open opportunities, engagement history, or intelligent recommendations.

- Configure Quote
  Configure a personalized quote with optimal products, services, and subscriptions that meets the prospect's needs.

- Price Quote
  Apply pricing and discounting strategies based on accurate price lists, promotions, and business rules.

- Manage Approvals
  Manage rule-based quote approval, including criteria, validation, escalation, notification, and approval.

- Share Quote
  Securely share the quote with the prospect as a tailored formal sales proposal. Update the sales stage and document the negotiation interactions. Automatically apply configuration and pricing rules on the modified quote. Ensure the pipeline amount reflects the latest version.

- Finalize Offer
  Ensure commercial viability with automated or manual rule-based and workflow-routed approval of pricing and terms such as billing, shipping, payment, scheduling, and service level requirements.

- Convert to Order
  Generate and securely share sales order and confirmation.

Product Mix: CX Sales
Popular KPIs: Time to Customer Quote, Average Revenue Per Order, Average % discount, Cost Per Quote, Sales Closing Ratio

Cloud Mobile Analytics Collaboration

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Integrate order channels
Accept orders placed from multiple channels, including EDI, service center, sales, ecommerce, mobile APP, subscription bundle, partners, and direct order entry. Allow changes and revisions based on preset business rules

Validate orders
Minimize order delays by validating order information upfront. Ensure that options—such as shipment and payment methods—comply with customer agreements and operation policies

Configure products and services (optional)
Configure orders using functional attributes or system components. Provide recommendations based on predefined rules from marketing and product teams

Price orders
Support complex discounts and charges—such as installation, shipping, and subscription bundle—via flexible pricing rules. Update pricing impact during order entry and configuration

Screen for compliance
Ensure that orders meet regulatory compliance policies, such as cross-border commerce and hazardous goods handling

Calculate availability
Calculate order promise date based on available current and future supply from inventory, material in-transit, planned production, and purchases

Product Mix: SCM Cloud (Order Management)
Popular KPIs: % shipping backlog, shipping dates promised vs. actual, fill rate
Fulfillment Orchestration to Invoice

Schedule orders
Automatically identify best source(s) of fulfillment based on business rules and criteria such as cost, delivery time, and service level agreement. Split orders, if needed.

Orchestrate fulfillment
Create warehouse orders for in-house stock. Reserve needed quantities from in-transit or WIP supply and set up back-to-back orders. Issue POs to drop-shipment sources. Plan transportation.

Monitor performance
Review key operation metrics via dashboard. Adjust fulfillment strategies based on demand and source performance.

Handle exceptions
Get status and notifications via secure trusted network. Prioritize and schedule backorders on a dashboard. Get suggestions to handle supply interruptions and order changes based on business rules. Use what-if analysis to pick appropriate actions.

Manage shipments
Obtain import and export documents, if needed. Execute shipment of goods. Update order status. Notify customers of shipments in-transit and provide tracking information via secure trusted network.

Generate invoices
Communicate requisite order information to Receivables for invoicing and settlement.

Product Mix: SCM Cloud (Order Management), ERP Cloud (Financials)
Popular KPIs: perfect order, average fulfillment cost per order

Cloud Mobile Analytics Collaboration Blockchain Internet of Things Big Data
Order to Drop Shipment

**Capture Multichannel Orders**
Capture, validate, and finalize sales orders from all channels. Track entire order process, including capture, promising, pricing, configuration, and fulfillment.

**Schedule Orders**
Automatically identify best-fit fulfillment, including suppliers, based on predetermined business rules and criteria, such as cost, availability, and lead time. Split orders if needed.

**Notify Suppliers**
Automatically create and distribute purchase orders to suppliers using a centralized portal or secure electronic messaging.

**Track Shipment Status**
Leverage a centralized portal for communications, including order changes, shipment updates, and invoices. Automatically notify customers of order status and provide tracking information using a secure trusted network.

**Manage Exceptions**
Handle order changes based on predetermined business rules. Prioritize and schedule backorders. Automatically update corresponding sales orders and purchase orders with the latest schedule adjustments and partial shipments.

**Trigger Settlement**
Generate invoices and automatically initiate supplier settlement based on fulfillment status. View invoices and purchase documents directly from an order dashboard.

**Monitor Performance**
Monitor status and notifications using a role-based dashboard.

Product Mix: SCM Cloud (Order Management)
Popular KPI: order to ship cycle time, % on-time shipment, DSO
Customer Invoice to Receipt

Create And Manage Transactions
Automatically generate customer invoices, credit and debit memos from sales fulfillment transactions based on business rules. Review status via role-based dashboards.

Send Invoices
Send customers discrete invoicing documents or consolidated statements via preferred format and delivery method (mail, email, or B2B e-commerce message).

Address Billing Issues
Manage customer disputes and billing issues with role-based dashboard. Collaborate on investigations via secure social platform. Apply corrections (credit or debit memos) and refunds after required review and approval.

Process Payments
Automatically match receipts to invoices even without remittance advice using configurable rules or scoring engine. Handle exceptions with help from recommendation algorithm.

Send Invoices
Send customers discrete invoicing documents or consolidated statements via preferred format and delivery method (mail, email, or B2B e-commerce message).

Address Billing Issues
Manage customer disputes and billing issues with role-based dashboard. Collaborate on investigations via secure social platform. Apply corrections (credit or debit memos) and refunds after required review and approval.

Process Payments
Automatically match receipts to invoices even without remittance advice using configurable rules or scoring engine. Handle exceptions with help from recommendation algorithm.

Manage Adjustments
Close receipts and invoices with remaining balances based on company policy and approval limits.

Post Receivables Activities
Automatically post all approved receivables activities to the general ledger to ensure current account balances.

Schedule Receivables Close
Stay on predetermined close schedule. Use integrated inquiry, reporting, and analysis tools to review and reconcile account balances. Post period close entries and close receivables period.

Product Mix: Cloud ERP (Financials)
Popular KPIs: avg. invoice age, DSO, % disputed invoices
Oracle Modern Best Practice for Logistics
Oracle Modern Best Practice

Lane Forecast to Carrier Contract

Determine new zones/lanes
Identify new or additional geographies. Determine requirements for lanes through insight-driven analysis

Share/tender RFP
Select attributes for each lane. Determine bid collection methods. Release to service providers via desktop, smart phone, tablet, etc.

Manage responses
Gather bids/required data. Monitor responses for compliance using the internal secure social network

Score bids
Analyze proposals for optimal service mix. Perform What-if scenarios on transportation spend

Select successful proposal(s)
Determine optimal service provider mix and allocation using unstructured data. Notify service providers on their desktop, smart phone, tablet, etc.

Define rates
Turn the selected bids into executable rates for Inbound/outbound shipping using desktop, smart phone, tablet, etc.

Product Mix: SCM Cloud (Logistics)
Popular KPIs: freight cost per unit, in-transit cycle time by lane, average working capital per shipment

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Inbound Shipment to Delivery

Manage Purchase Orders
Suppliers use a centralized portal to review received purchase orders and confirm goods are ready for shipment with details including quantities, pickup locations, and appointment dates.

Optimize Transportation Plan
Consolidate purchase orders into shipments based on business priorities to reduce costs while meeting delivery requirements. Review optimization results, including consolidated loads, appointments, and machine learning predictive analysis.

Manage Booking and Tendering
Communicate with carriers for confirmed loads using EDI, email, or mobile device. Leverage digital freight brokerages for best rate options.

Monitor Shipments
Monitor in-transit shipments for exceptions using a dashboard. Leverage machine learning for estimated time of arrival (ETA) updates. Take mitigation actions, such as notifying contacts or rescheduling warehouses to minimize downstream impact.

Provide Shipment Status
Leverage digital assistant to respond to inquiries about purchase order shipment status on any device.

Confirm Delivery
Carriers deliver shipments to destinations and enter proof of delivery (POD) information, including shipment ID and acceptance signature, on any device.

Create Invoices
Automatically create carrier invoices for payment upon POD.

Product Mix: SCM Cloud (Logistics)
Popular KPIs: % on-time deliveries, $ in-transit damages.
Outbound Shipment to Delivery

Manage Shipping Orders
Transportation department receives sales orders for movement of goods.

Optimize Transportation Plan
Consolidate sales orders into shipments based on business priorities to reduce costs while meeting delivery requirements. Review optimization results, including consolidated loads, modes, carriers, and equipment or trailer selection.

Review Fleet Utilization (optional)
Review optimization results, including fleet versus contract carrier selection. Leverage unused fleet capacity for shipments, such as customer returns and internal material transfers.

Manage Booking and Tendering
Communicate with carriers for confirmed loads using EDI, email, or mobile device. Leverage digital freight brokerages for best rate options.

Manage Shipments
Automatically generate required documents, such as bills of lading (BOL), for carrier pickup after shipments are packed, weighed, and counted. Record departure time and monitor in-transit shipments for exceptions using a dashboard. Leverage machine learning for estimated time of arrival (ETA) updates.

Provide Shipment Status
Leverage digital assistant to respond to inquiries about sales order shipment status on any device.

Confirm Delivery
Carriers deliver shipments to destinations and enter proof of delivery (POD) information, including shipment ID and acceptance signature, on any device.

Pay Service Provider
Review and approve received invoices or automatically create carrier invoices for payment upon POD according to payment policy.

Product Mix: SCM Cloud (Logistics)
Popular KPIs: % on-time pickups, % in-transit damages, freight cost per order
Freight Invoice to Approval

Manage Freight Invoices
Import electronic invoices from service providers, carriers, or other parties. Review invoices and proof of delivery (POD) using role-based dashboards.

Match Documentation
Perform rule-based processing to compare received invoices against all delivered shipments to determine the match between documentation and freight.

Review Out-of-Tolerance Invoices
Perform exception-based reviews of system-determined invoices which are not within defined tolerances.

Resolve Discrepancies
Carriers use a centralized portal to review invoices and resolve issues.

Manage Allocation and Chargeback
Review an insight-driven dashboard breakdown of freight costs to customer shipments or orders.

Pay Service Providers
Approve and transfer vouchers to accounts payable or automatically create payment vouchers based on POD for eligible carriers.

Product Mix: SCM Cloud (Logistics), ERP Cloud (Financials)
Popular KPIs: % error-free freight bills, person-hour per discrepancy resolution

Cloud  Mobile  Analytics  Collaboration
Oracle Modern Best Practice

Trade Screening to Compliance

**Screen Restricted Parties**
Perform restrictive party and sanction screening on transactions, including sales orders, purchase orders, and shipments. Review transactions, flag potential noncompliance, and update party status after investigation using a centralized dashboard.

**Ensure Item Classification**
Review trade transactions flagged for improper goods classification using a dashboard. Use a guided tool and predefined rules to accurately determine appropriate classification details, including country of origin.

**Manage Licenses**
Automatically hold shipments subject to trade controls and release them once licenses are applied. Create licenses and manage the data collection and submission processes using a dashboard. Track license usage and get notifications for upcoming depletion or expiration.

**Finalize Documents**
Review and finalize certificates of origin based on free trade agreement (FTA) qualification assignment prior to shipment. Easily collaborate with partners and customers to create and track customs documents. Leverage electronic filing and broker communication to automate customs procedures.

**Process Restricted Party Hits**
Address restricted party hits on master data to ensure compliance for future orders and shipments. Review potential matches and take actions using a centralized dashboard.

**Classify New Items**
Identify appropriate classifications for new items and optimal country pairings for duty and tax savings to make informed sourcing decisions. Route new item classifications to designated approvers based on business rules.

**Qualify for Trade Agreement**
Capture duty savings by automatically validating goods in shipments are eligible for preferential treatment under a trade agreement. Easily collaborate with suppliers, customs, and brokers on required documents, such as certificates of origin.

**Manage Ongoing Compliance**
Automatically receive updates of regulatory content to stay compliant. Quickly identify potential noncompliance, resolve issues, and access key metrics using dashboards.