

xperitus

ERP systems specialists

JD Edwards Nordic Conference 2024

Order fulfillment and cross docking: Optimize your fulfillment process of inventory to sales order lines to ensure customer satisfaction.

When you have limited supply, you need insight into how to prioritize orders. With Oracle's JD Edwards EnterpriseOne Fulfillment Management, you rapidly access all the information needed to assign inventory to customer sales orders. You set objectives or service levels for one customer or groups of customers, by product or product group, as well as by supply location. Depending on how you set your service levels, JD Edwards EnterpriseOne generates fulfillment plans that you manage or modify as necessary.

Use Cross-Docking to earmark a purchase order to a sales order, partially or fully, when receiving it.



JD Edwards Nordic Conference 2024

Speaker:

Helena Nilsson

Functional Specialist

Funch BA with 25 years of JDE consulting experience.



JD Edwards Nordic Conference 2024

Agenda:

- Fulfillment Management
- Cross-Docking

Time and Place

14:00 – 14:45

Room Chatty Cathy B

Fulfillment Management

Business Challenge

How can we...

- Prioritize customer demand
- Manage how inventory is filled to orders
- Improve order fill rates
- Ensure service-level compliance
- Reduce penalty fees
- Reduce administration costs



Order Fulfillment Management

JD Edwards EnterpriseOne Fulfillment Management addresses situations in which enterprises cannot fulfill all of the orders for their products.

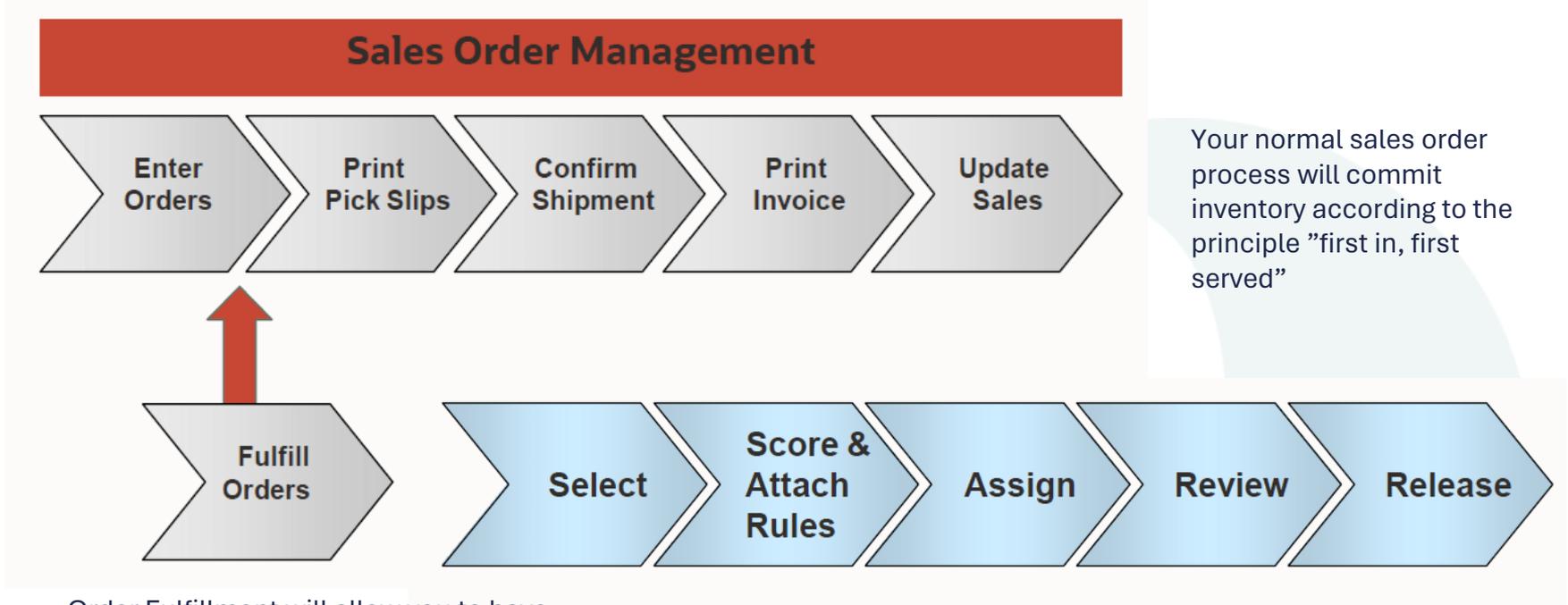
The purpose of the JD Edwards EnterpriseOne Fulfillment Management system is to fulfill orders in accordance with criteria agreed upon between you and your customers.

The JD Edwards EnterpriseOne Fulfillment Management system fulfills orders based upon criteria that you set, which enables you to:

- Generate priority order scores and then match available inventory to open orders.
- Use service level rules to define fill rates for customer orders and ensure compliance with stated fill rates before releasing orders.
- Implement an automated process that fulfills inventory to orders based on the rules.
- Review the fulfillment quantities and make necessary changes.

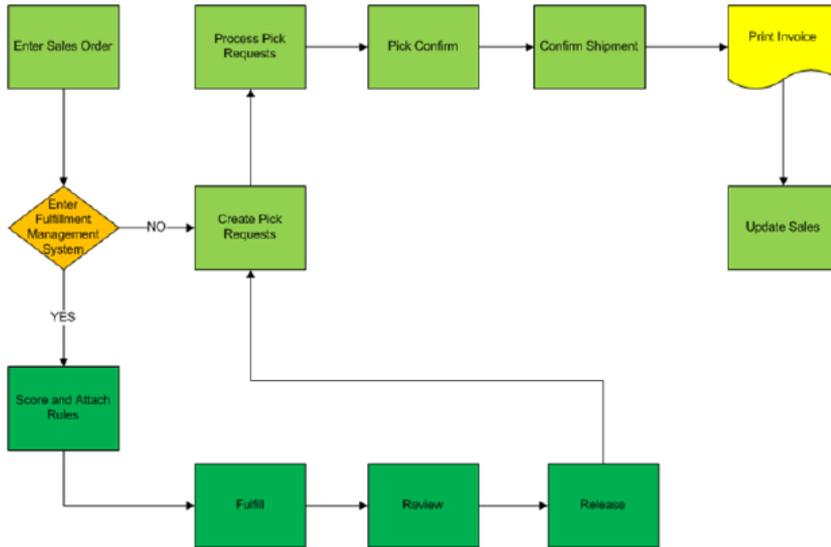
The JD Edwards EnterpriseOne Fulfillment Management system significantly reduces or eliminates backorders that occur because of inventory availability issues.

Order Management Process



Order Fulfillment will allow you to have a more advanced way of prioritizing and committing inventory.

Order Management Process



- Setup determines if an order line is subject to the order fulfillment process.
- If the order line is selected for fulfillment it will go through the fulfillment steps until released for the next step in your normal order process.
- You can view and revise fulfillment information in the Fulfillment Workbench.

Order Management Process

- Let's say our company sells a golden pen that is very popular.
- We have decided to manage the demand using the order fulfillment process.
- Using the Advanced Preferences, we have defined that when we place an order for item "AUPEN" with order type SO, the line will move into the order fulfillment process.

Advanced Preferences Schedule Revisions - Preference Values Revisions

✓ ✖ ⚙ Tools

Preference Name **FMALLOC** *Fulfillment Entry*

Advanced Preference Type **41** *Fulfillment Entry*

Records 1 - 2



	Sequence	Or Ty	In Fulfillment
<input checked="" type="checkbox"/>	10,00	SO	1



Order Management Process

- Since we have defined that this item is managed by order fulfillment, it will automatically move into that process. This is regardless if there is available stock or not.
- The ordered quantity will be entered into the future commit field in Item Availability.

Enter New Order

Summarize Order Submit and Enter New Submit and Close Cancel

Sales Order Header Line Advisor Order Profit Order Summary

Edit Full Header Order Address Credit Check Attachments Credit Memo

Order Number: 3640 SO 00001 Previous Order Number: []
 Sold To: 55167 Mom & Pop Supply Company Hold Code: []
 Ship To: 55167 Mom & Pop Supply Company Order Date: 2024
 Branch/Plant: 30 Credit Message: []
 Customer PO: [] Temporary Credit Msg: []
 Currency: USD Exchange Rate: [] Base Currency: USD

Sales Order Detail Line Availability Free Goods Line Defaults

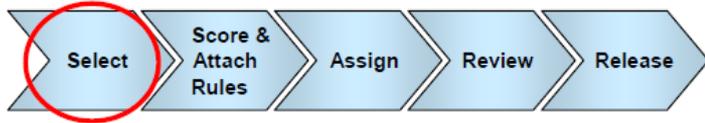
Check Availability Cancel Line Check Price Price History Kits/Configurator Cross Reference

Records 1 - 2

<input type="checkbox"/>	<input checked="" type="checkbox"/> Quantity Ordered	UOM	Item Number	Line Advisor	Supply Monitor	In Fulfillment	Line Type	Unit Price	Extended Price	Branch/Plant
<input type="checkbox"/>	10	EA	AUPEN		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	S	300,000	3.000,00	30

You need to have the In-Memory Sales Advisor activated to see this.

Fulfillment Management Process



So, our sales order line has now been selected based on, in this example, Item and Document Type.

Since this selection is driven via Advanced Preferences, you can also define the selection based on:

- Item group
- Customer
- Customer Group
- Complex Item – and Customer Groups

Always in combination with a Document Type though.

Fulfillment Management Process



Next, the fulfillment process scores and attach relevant rules to the order line.

- Order lines are scored based on:
 - Order Type, Line Type, Requested Date and Customer Priority and a weighted factor if using advanced scoring.
 - It is also possible to call a custom business Function. This will not be covered in this session.
- Order lines can be scored during sales order entry or using a batch application.

Please note that it is possible to have an order line enter into the fulfillment management without applying any scores in the case you would like to manually distribute the stock between your orders.

Fulfillment Management Process



There are two methods of scoring a sales order line; **Basic** and **Advanced**. You choose one or the other by defining the relevant version of the scoring application in the P4210 processing options.

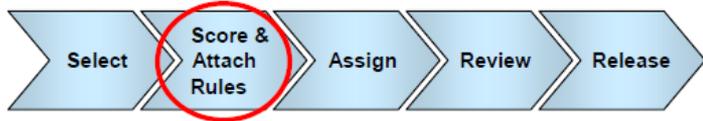
Basic Scoring Assignment

- Uses a grid to input the assigned score value based on customer priority, Doc Ty, Line Ty and Req Date.
- Import/Export
- No calculations

Advanced Preference Scoring

- Use three new preferences for order type, line type and requested date age.
- Use special handling field on Customer Priority.
- Uses a weighted average for the above criteria.

Fulfillment Management Process – Basic Scoring



Basic scoring is a predefined matrix based on the order type, requested date age, line type, customer priority, and custom business function, if there is one.

You can interactively enter, import, and export data. Sequence the data in all fields in ascending order to specify how the system retrieves the records.

The customer priority value comes from the Special Handling field in the UDC H40/PR.

For the basic scoring method, the system uses the custom priority as a criteria for retrieving the score from the Basic Fulfillment Scoring Setup table

A	High Priority - Fulfillment	100	Y
B	Medium Priority - Fulfillment	75	Y
C	Low Priority - Fulfillment	50	Y

Basic Scoring Setup

Order Type: Line Type:

Customer Priority: From: To:

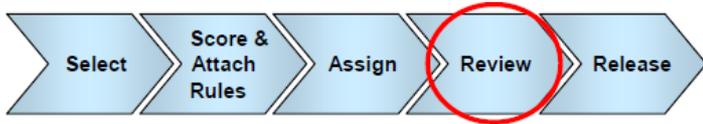
Requested Date Age: From: To:

Custom Function Priority: From: To:

Records 1 - 16

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Priority From	Order Type	Requested Date Age From	Line Type	Custom Function Priority From	Order Score
<input type="checkbox"/>	<input checked="" type="checkbox"/>	50,000	SO		999- S	,000	135,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	50,000	SO		1 S	,000	90,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	50,000	SO		5 S	,000	60,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	50,000	SO		10 S	,000	30,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	50,000	SO		40 S	,000	9,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	75,000	SO		999- S	,000	145,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	75,000	SO		1 S	,000	100,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	75,000	SO		5 S	,000	70,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	75,000	SO		10 S	,000	40,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	75,000	SO		40 S	,000	11,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	100,000	SO		999- S	,000	160,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	100,000	SO		1 S	,000	120,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	100,000	SO		5 S	,000	85,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	100,000	SO		10 S	,000	55,000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	100,000	SO		40 S	,000	14,000

Fulfillment Management Process – Workbench



So, what score is applied to our order line? Let's review the Fulfillment Workbench.

Fulfillment Workbench - Search Personal Form: (No Personalization) Query: All Records

Tools

Basic Search | **Advanced Search**

Fulfillment Plan ID: *
 Branch Plant: *

Dates
 Date Type: Requested Date
 From/To:

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

Unfulfilled Items
 Records 1 - 2

Description	2nd Item Number	Dual Item	Kit Parent Item	Business Unit
#2 Pencil	#2 PENCIL	<input type="checkbox"/>	<input type="checkbox"/>	30
Gold Pen 18K	AUPEN	<input type="checkbox"/>	<input type="checkbox"/>	30

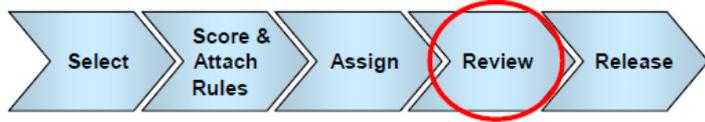
Edit Fulfillment | Release Fulfillment

Other Row Actions: -- Select One --

Sales Order Lines--for-Gold Pen 18K
 Records 1 - 1

Order Number	Or Ty	Order Co	Line Number	Customer Sold To	Customer Sold To Name	2nd Item Number	Description 1	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Order Score	Fulfillment Status	Fulfillment Status De
3640	SO	00001	1,000	55167	Mom & Pop Supply...	AUPEN	Gold Pen 18K	55167	Mom & Pop Supply C...	10	EA	135,000	10	Entered

Fulfillment Management Process – Workbench



A	High Priority - Fulfillment	100	Y
B	Medium Priority - Fulfillment	75	Y
C	Low Priority - Fulfillment	50	Y

The score for our order line is “135”. Why is that?

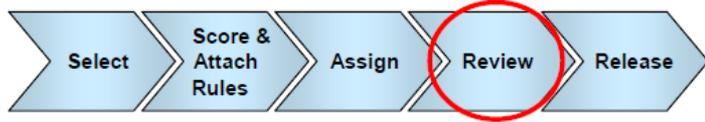
1. Our customer, 55167, has Priority Code “C” which equals 50 in the Special Handling Code.
2. Our order type and line type is SO and S.
3. Our requested date is today.

Let’s check the matrix.

Customer Priority From	Order Type	Requested Date Age From	Line Type	Custom Function Priority From	Order Score
50,000	SO	999-	S	,000	135,000
50,000	SO		1 S	,000	90,000

Order Number	Or Ty	Order Co	Line Number	Customer Sold To	Customer Sold To Name	2nd Item Number	Description 1	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Order Score	Fulfillment Status	Fulfillment Status Description
3640	SO	00001	1,000	55167	Mom & Pop Supply...	AUPEN	Gold Pen 18K	55167	Mom & Pop Supply C...	10	EA	135,000	10	Entered

Fulfillment Management Process – Workbench



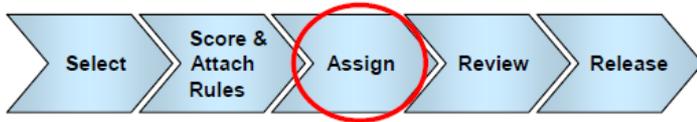
A	High Priority - Fulfillment	100	Y
B	Medium Priority - Fulfillment	75	Y
C	Low Priority - Fulfillment	50	Y

If I enter a new order with the same requested date for a customer with priority code A, It will be scored higher.

Order Number	Or Ty	Order Co	Line Number	Customer Sold To	Customer Sold To Name	2nd Item Number	Description 1	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Order Score	Fulfillment Status	Fulfillment Status Description
3640	SO	00001	1,000	55167	Mom & Pop Supply...	AUPEN	Gold Pen 18K	55167	Mom & Pop Supply C...	10	EA	135,000	10	Entered
3641	SO	00001	1,000	55159	ABC Big Box Store	AUPEN	Gold Pen 18K	55159	ABC Big Box Store	10	EA	160,000	10	Entered

Customer Priority From	Order Type	Requested Date Age From	Line Type	Custom Function Priority From	Order Score
100,000	SO	999-	S	,000	160,000
100,000	SO	1	S	,000	120,000

Fulfillment Management Process



When a score and a rule has been applied, it's time to assign inventory to the orders.

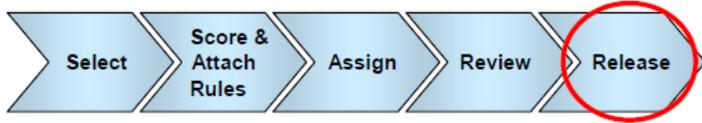
This can be done interactively in the Fulfillment Workbench or via a batch application.

- Batch fulfillment, R4277701 Auto Fulfillment
- Interactive Fulfillment

We will run the batch application. Since there where no shortage of inventory both lines are fulfilled. Had there been a shortage, the system would have distributed the available inventory according to scoring and the fulfillment rule, should one have been applied.

Order Number	Or Ty	Order Co	Line Number	Customer Sold To	Customer Sold To Name	2nd Item Number	Description 1	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Order Score	Fulfillment Status	Fulfillment Status Description
3640	SO	00001	1,000	55167	Mom & Pop Supply...	AUPEN	Gold Pen 18K	55167	Mom & Pop Supply C...	10	EA	135,000	30	Fulfilled
3641	SO	00001	1,000	55159	ABC Big Box Store	AUPEN	Gold Pen 18K	55159	ABC Big Box Store	10	EA	160,000	30	Fulfilled

Fulfillment Management Process



The last step is to release the orders from the fulfillment process and move the order lines into normal sales order process

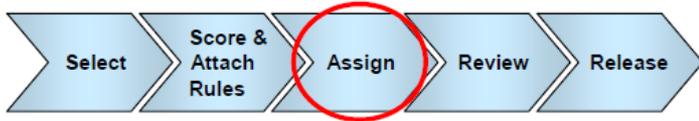
This can be done interactively in the Fulfillment Workbench or via a batch application.

- Batch release, R4277703 Release from fulfillment
- Interactive release

It is also possible to release when you run the batch application to assign inventory. We will run the batch application. When release the order lines are no longer visible in the Fulfillment Workbench. In the Sales Order application, the order line is no longer checked to be "In Fulfillment".

Sales Order Detail											
Line Availability											
Free Goods											
Line Defaults											
Check Availability		Cancel Line		Check Price		Price History		Kits/Configurator		Cross Reference	
Records 1 - 2											
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quantity Ordered	UOM	Item Number	Line Advisor	Supply Monitor	In Fulfillment	Line Type	Unit Price	Extended Price	Branch/Plant
<input type="checkbox"/>		10	EA	AUPEN			<input type="checkbox"/>	S	300,0000	3.000,00	30

Fulfillment Management Process



What would have happened if we have had a shortage of stock?

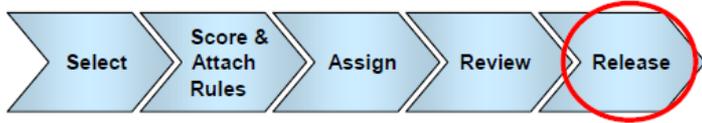
We currently only have 15 EA available of the Gold Pen and the demand is for 20 EA.

Even though order 3663 was placed first, the scoring for that order is lower why the order 3664 will be filled first.

Records 1 - 2 Fulfillment

			Order Number	Or Ty	Order Co	Line Number	Customer Sold To	Customer Sold To Name	2nd Item Number	Description 1	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Order Score	Fulfillment Status	Fulfillment Status Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	/-	3663	SO	00001	1,000	55167	Mom & Pop Supply...	AUPEN	Gold Pen 18K	55167	Mom & Pop Supply C...	10	EA	135,000	40	Partially Fulfilled
<input type="checkbox"/>			3664	SO	00001	1,000	55159	ABC Big Box Store	AUPEN	Gold Pen 18K	55159	ABC Big Box Store	10	EA	160,000	30	Fulfilled

Fulfillment Management Process



The fulfilled quantity is released to the normal sales order process while 5 EA is remaining in fulfillments as "not fulfilled".

Sales Order Lines--for-Gold Pen 18K Other Row Actions: -- Select One --

Records 1 - 1 Fulfillment

		Order Number	Or Ty	Order Co	Line Number	Customer Sold To	Customer Sold To Name	2nd Item Number	Description 1	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Order Score	Fulfillment Status	Fulfillment Status Description
<input type="checkbox"/>		3663	SO	00001	1,100	55167	Mom & Pop Supply...	AUPEN	Gold Pen 18K	55167	Mom & Pop Supply C...	5 EA		135,000	20	Not fulfilled



Fulfillment Management Process – Advanced Scoring

The advanced preference score method enables you to set up priority scores using advanced preference functionality. The system calculates the score for the order lines using the weight factors and determines a weighted average. The system calculates the score using the formula:

$$\text{Score} = [(\text{Order Type Priority} \times \text{Order Type Weighted Percent}) + (\text{Line Type Priority} \times \text{Line Type Weighted Percent}) + (\text{Requested Date Priority} \times \text{Requested Date Age Weighted Percent}) + (\text{Customer Priority} \times \text{Customer Weighted Percent}) + (\text{Custom Business Function Priority} \times \text{Custom Business Weighted Percent})]$$



Fulfillment Management Process – Advanced Scoring

Let's have a look at what that actually means.

1. We start by looking at the advanced preferences. These preferences are dedicated to Order Fulfillment.
2. We go into detail for preference FMREQDT.
3. Each “Days until...” has a priority value defined.

Advanced Preferences Schedule Revisions - Preference Schedule Revisions

✓ ✖ ✕ ⚙ Eorm ⌵ Row ⚙ Tools

Preference Schedule **FMDEMO** Fulfillment Demo Schedule

Records 1 - 6

<input type="checkbox"/>	<input type="checkbox"/>	Seq No.	Preference Name	Description	Effective Date	Expired Date
<input type="checkbox"/>	<input type="checkbox"/>	10	FMALLOC	Fulfillment Entry	2010-01-01	2040-12-31
<input type="checkbox"/>	<input type="checkbox"/>	20	FMREQDT	Requested Date Priority	2010-01-01	2040-12-31
<input type="checkbox"/>	<input type="checkbox"/>	30	FMORD	Fulfillment Entry Otype	2010-01-01	2040-12-31
<input type="checkbox"/>	<input type="checkbox"/>	40	FMLINE	Fulfillment Line	2010-01-01	2040-12-31
<input type="checkbox"/>	<input type="checkbox"/>	50	FMEMAIL	Fulfillment Email Notification	2010-01-01	2040-12-31

Preference Name **FMREQDT** Requested Date Priority

Advanced Preference Type **44** Requested Date Age Priority

Records 1 - 7

<input type="checkbox"/>	Sequence	Days until Requested Date	Requested Date Priority
<input type="radio"/>	10,00	-999	100,000
<input type="radio"/>	20,00	1	90,000
<input type="radio"/>	30,00	5	75,000
<input type="radio"/>	40,00	10	60,000
<input type="radio"/>	50,00	50	50,000
<input type="radio"/>	60,00	999	25,000



Fulfillment Management Process – Advanced Scoring

The different preferences all have priority values defined. When running the scoring, the value picked from the preferences are multiplied with a weighted value for each of the below components + the customer priority value. The sum of the four weight factors has to be = 100. In this example we can see that Customer Priority and Requested Date age scores high.

Sequence	Days until Requested Date	Requested Date Priority
10,00	-999	100,000
20,00	1	90,000
30,00	5	75,000
40,00	10	60,000
50,00	50	50,000
60,00	999	25,000

Sequence	Or Ty	Order Type Priority
10,00	S4	3,000
20,00	SO	5,000

Sequence	Ln Ty	Line Type Priority
10,00	S	6,000

R4277702 Fulfillment Batch Scoring Process

Processing Options

✓ ✗

Process

1. Scoring Method
Blank = Basic
1 = Advanced

2. Weight Factor for Order Type Priority Preference

3. Weight Factor for Line Type Priority Preference

4. Weight Factor for Customer Sold To Priority

5. Weight Factor for Requested Date Priority Preference

Fulfillment Management Process – Advanced Scoring

What value would an order line for customer 55167 and item AUPEN get with advanced scoring?

Order Type “SO” = 5

Line Type “S” = 6

Requested Date “-999” = 100

Customer Priority Code “C” = 50

Score = [(Order Type Priority × Order Type Weighted Percent) + (Line Type Priority × Line Type Weighted Percent) + (Requested Date Priority × Requested Date Age Weighted Percent) + (Customer Priority × Customer Weighted Percent) + (Custom Business Function Priority × Custom Business Weighted Percent)]

	Priority Value	Weight Factor	
SO	5	0,15	0,75
S	6	0,15	0,9
-999	100	0,30	30
C	50	0,40	20
Total			51,65



Fulfillment Management Process – Advanced Scoring

Let's put this to the test.

The order lines enter the fulfillment process.

	Priority	Weight	
	Value	Factor	
SO	5	0,15	0,75
S	6	0,15	0,9
-999	100	0,30	30
C	50	0,40	20
Total			51,65

Sales Order Detail | Line Availability | Free Goods | Line Defaults

Check Availability | Cancel Line | Check Price | Price History | Kits/Configurator | Cross Reference | More R...

Records 1 - 2

<input type="checkbox"/>	<input type="checkbox"/>	Quantity Ordered	UOM	Secondary Qty	Secondary UM	Item Number	Line Advisor	Supply Monitor	In Fulfillment	Line Type	Unit Price	Extended Price	Branch/Plant
<input type="checkbox"/>	<input checked="" type="checkbox"/>		10 EA		10 EA	AUPEN		■	<input checked="" type="checkbox"/>	S	300,000	3.000,00	30

And the workbench gives us the score from the advanced scoring where the calculation seems to be correct.

Sales Order Lines--for-Gold Pen 18K

Order Row Actions: -- Select One --

Records 1 - 1

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Order Number	Or Ty	Order Co	Line Number	Customer Sold To	Customer Sold To Name	2nd Item Number	Description 1	Customer Ship To	Customer Ship To Name	Quantity Ordered	UM	Order Score	Fulfillment Status	Fulfillment Status Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3642	SO	00001	1,000	55167	Mom & Pop Supply...	AUPEN	Gold Pen 18K	55167	Mom & Pop Supply C...	10 EA		51,650	10	Entered

Fulfillment Management Process – SLA (Service Level Agreement)

Let's put another layer to the Fulfillment Management Process: Service Level Agreements

A service level rule defines the requirements for fulfilling sales orders for your customers.

The system searches for service level rules based upon customer, customer group, item, item group, branch plant, release number, effective date, and expiration date.

You specify what should happen with the unfulfilled quantity for a sales order line is when released from fulfillment.

Service Level Rules Setup - Service Level Rule Maintenance Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Save and Continue Save and Close Clear Form Tools

Effective Date: From [] Through [] Expiration Date: From [] Through []

Records 1 - 5 Fulfillment

	Sequenc No.	Address Number	Customer Group	Item Number	Item Group	Business Unit	Release Number	Effective Date	Expired Date	Rule Type	Order Minimum Fill Percentage	Line Minimum Fill Percentage	Custom Function	Cancel YN	Partial Commit
<input type="checkbox"/>	10	55159					30	1	2010-01-01	2040-12-31 01	70,0000%	80,0000%		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	20	55167					30	1	2010-01-01	2040-12-31 01	75,0000%	80,0000%		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	90	55167					30	2	2016-09-22	2040-12-31 02		75,0000%		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	120	55159					30	2	2010-01-01	2040-12-31 02		90,0000%		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Fulfillment Management Process – SLA (Service Level Agreement)

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

Service Level Rules Setup - Service Level Rule Maintenance Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Save and Continue Save and Close Clear Form Tools

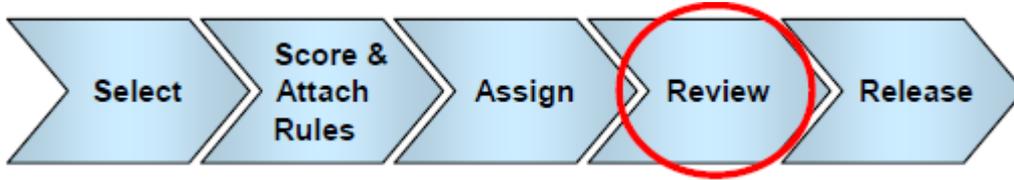
Effective Date Expiration Date

From Through From Through

Records 1 - 5 Fulfillment

	Sequenc No.	Address Number	Customer Group	Item Number	Item Group	Business Unit	Release Number	Effective Date	Expired Date	Rule Type	Order Minimum Fill Percentage	Line Minimum Fill Percentage	Custom Function	Cancel YN	Partial Commit
<input type="checkbox"/>	10	55159					30	1	2010-01-01	2040-12-31 01	70,0000%	80,0000%		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	20	55167					30	1	2010-01-01	2040-12-31 01	75,0000%	80,0000%		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	90	55167					30	2	2016-09-22	2040-12-31 02		75,0000%		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	120	55159					30	2	2010-01-01	2040-12-31 02		90,0000%		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Fulfillment Management Process

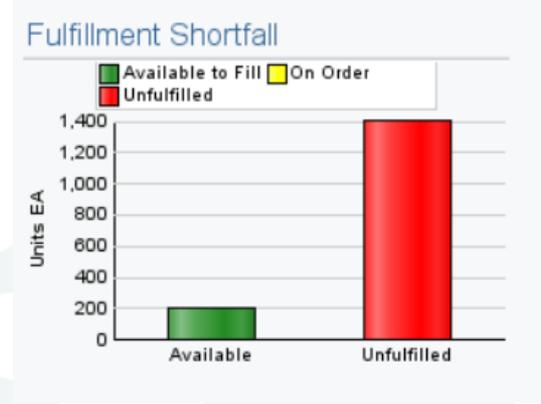


Modify inventory assignments

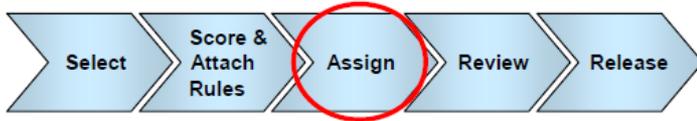
Interactive fulfillment

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 – Basic Rules



The fulfillment rules enable you to manage your safety stock by assigning inventory based on two components—score and safety stock percentage. When processing fulfillment rules, the system evaluates these components to determine whether to apply the fulfillment percentage.

Fulfillment Rules - Fulfillment Rules - Add Rule

✓ 🗑️ ✖️ ⚙️ Tools

Fulfillment Rule *

Description

Records 1 - 5 ⬆️ ⬇️ ⬆️

<input type="radio"/>		Sequence No.	Score Range From	Safety Stock Percentage	Fulfillment Percentage
<input type="radio"/>		10	500	150,0000%	100,0000%
<input type="radio"/>		20	100	140,0000%	100,0000%
<input type="radio"/>		30	50	120,0000%	90,0000%
<input type="radio"/>		40	10	110,0000%	75,0000%

The Fulfillment Rules program (P4277720) enables you to set up fulfillment rules that the system uses in the Auto Fulfillment Processing report. The fulfillment rules enable you to manage your safety stock by assigning inventory based on two components—score and safety stock percentage.

When processing fulfillment rules, the system evaluates these components to determine whether to apply the fulfillment percentage.

Content

Fulfillment Management

Drives Operational Improvements



ORACLE
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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 rates

Improve Customer Service

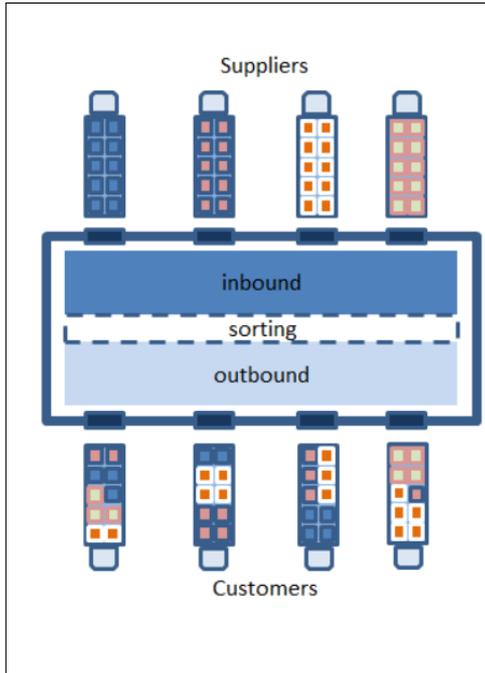
- Improve order and line fill rates for priority customers
- Enforce targeted service levels
- Reduce late orders for priority customers
- Reduce backorders and lost sales
- Track reasons for overriding standard service level rules

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)

Cross-Docking

Cross-Docking



In JD Edwards EnterpriseOne, Cross-Docking is managed by connecting outbound sales orders (Demand) with inbound purchase orders or Work orders (Supply). The sales orders can have shipments attached to them (Transportation module) or can generate Pick Requests (Warehousing module) however neither is a requirement in order to use Cross-Docking.

So, is this something new? No, but you may have disregarded it due to its early limitations.

In older releases like Oneworld XE and ERP 8 only opportunistic Cross-Docking was available (activated from the Warehousing processing option tab behind P4312). Opportunistic Cross-Docking also required the use of the Warehousing module.

In later releases, a new dedicated Cross Docking tab was added to the processing options of Purchase Order Receipts P4312 which included the option for planned Cross-Docking. There is also the option to do planned crossed-docking.

Planned Cross-Docking

Planned Cross-Docking provides the user with the visibility of inbound (PO and WO) and outbound (SO) order lines in a workbench ([P4614](#)) and gives the ability to directly allocate inbound inventory to sales orders in the order of priority without calling the Backorder release program. It also allows using Cross-Docking with or without the Warehouse management system.

Work With Planned Cross Docking Workbench Personal Form: (No Pe

✓ 🔍 ✕ ⚙️ Tools

Item Number
 Thru Date

Records 1 - 1

Branch Plant	Item Number	Description	Description 2	Search Text	UM	Line Type	Sales Code
40	2465	Cellular Telephone	Cell Phone, Cellular		EA	S	

Planned Cross Docking Workbench Revisions Personal Form: (No Personalization) Layout: (No Layout)

✓ ✕ ⚙️ Resort Grid 📄 Form 📄 Row ⚙️ Tools

Item Number Cellular Telephone Branch/Plant
 U/M Each
 Thru Date

Records 1 - 4

Promised Date	Cross Dock Priority	Demand Quantity	Supply Quantity	Quantity Available	Order Number	Order Type	Order Company	Order Suffix	Line Number	Supplier/ Customer	Ship To Name	Cross Docked	Cross Dock Order Number	Cross Dock Order Type	Cross Dock Order Company	Cross Dock Order Suffix	Cross Dock Line Number
2024-05-12										On Hand minus Hard Commit							
2024-05-12			50	50	5280	OP	00001	000	1,000	Universal Incorporated							
2024-05-12		15		35	3653	SO	00001		1,000	ABC Big Box Store	ABC Big Box St...	1	5280	OP	00001	000	1,000
2024-05-12		15		20	3655	SO	00001		1,000	Office Depot	Office Depot	1					

Planned Cross-Docking

You can also link a sales order to a purchase order directly in P42101 or P4210. It will be visible in the workbench ([P4614](#)).

Sales Order Header | Line Advisor | Order Profit | Order Summary

Edit Full Header | Order Address | Credit Check | Attachments | Credit Memo | Go To

Order Number: 3655 SO 00001 Previous Order Number: [Redacted]
Sold To: 55204 Office Depot Hold Code: [Redacted] Blank - Hold Codes 42/HC
Ship To: 55204 Office Depot Order Date: 2024-05-12
Branch/Plant: 40 Credit Message: [Redacted]
Customer PO: [Redacted] Temporary Credit Msg: [Redacted]
Currency: USD Exchange Rate: [Redacted] Base Currency: USD Foreign

Sales Order Detail | Line Availability | Free Goods | Line Defaults

Check Availability | Cancel Line | Check Price | Price History | Kits/Configurator | Cross Reference | More Row Actions

Records 1 - 2

Related Kit Component	Kit Master Line Number	Component Line Number	Cross Dock Order Number	Cross Dock Order Type	Cross Dock Line Number	Cross Dock Order Company	Cross Dock Order Suffix	Cross Dock Priority	Cross Docking Flag	Ex Vc
			5279	OP	1,000	00001	000		1	

Opportunistic Cross-Docking

The opportunistic method is when a purchase order receipt is confirmed, and backorder release is run from P4312.

Wrap-Up

JD Edwards Nordic Conference 2024

Wrap up:

This was two different ways to fulfill your customers demands.

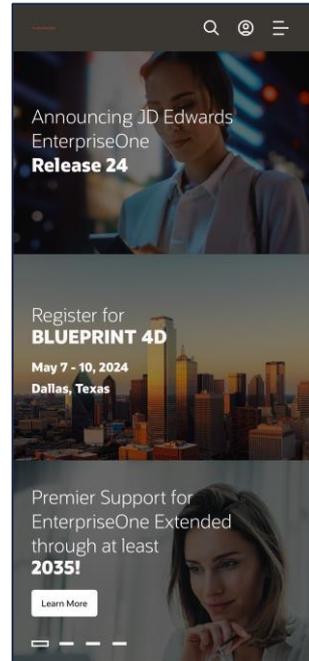
Don't let FIFO rule how your inventory is committed.

Find out more:



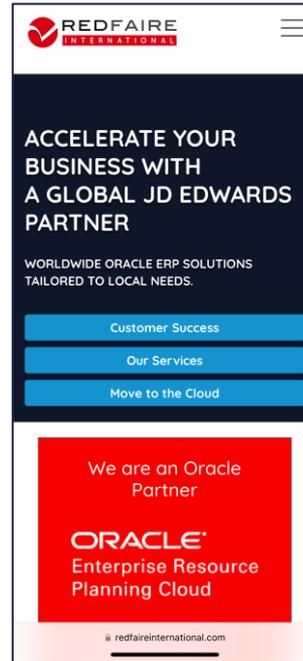
The screenshot shows the xperitus website. At the top, there is a navigation bar with the xperitus logo, a globe icon, and a menu icon. The main content area features a dark blue background with the text "ERP Systems Specialists" and a sub-headline "xperitus is an Oracle Partner and experts in the ERP systems NetSuite and JD Edwards, 15 years of experience in implementing ERP for the manufacturing industry, distributors, wholesalers, and Field Service." Below this is a red button labeled "Book a Consultation". At the bottom, there is a section for "ORACLE JD Edwards" and a promotional banner for "JD Edwards Nordic Conference" on "Tuesday, 14 May, 2024" at "Hotel Jacyz, Gothenburg, Sweden". The footer includes logos for xperitus, ORACLE, REDFAIRE INTERNATIONAL, and Cadran.

[xperitus – Your ERP System Partner](#)



The screenshot shows the LearnJDE website. At the top, there is a navigation bar with a search icon, a social media icon, and a menu icon. The main content area features a dark background with the text "Announcing JD Edwards EnterpriseOne Release 24" and a sub-headline "Register for BLUEPRINT 4D" with dates "May 7 - 10, 2024" and location "Dallas, Texas". Below this is a section for "Premier Support for EnterpriseOne Extended through at least 2035!" with a "Learn More" button. The footer includes a social media icon and a navigation bar.

[LearnJDE | JD Edwards Resource Library \(oracle.com\)](#)



The screenshot shows the Redfaire International website. At the top, there is a navigation bar with the REDFAIRE INTERNATIONAL logo and a menu icon. The main content area features a dark background with the text "ACCELERATE YOUR BUSINESS WITH A GLOBAL JD EDWARDS PARTNER" and a sub-headline "WORLDWIDE ORACLE ERP SOLUTIONS TAILORED TO LOCAL NEEDS." Below this are three blue buttons: "Customer Success", "Our Services", and "Move to the Cloud". At the bottom, there is a red section with the text "We are an Oracle Partner" and "ORACLE Enterprise Resource Planning Cloud". The footer includes the website URL "redfaireinternational.com".

[Redfaire International | Oracle JD Edwards and ERP Cloud Consultants \(EN\)](#)



The screenshot shows the Cadran website. At the top, there is a navigation bar with the Cadran logo and a menu icon. The main content area features a dark red background with the text "The leading Oracle partner in The Netherlands" and a sub-headline "With 25 years of experience with implementation, support & hosting of ERP-systems for wholesale, manufacturing and commodity trade." Below this is a red button labeled "Discover our ERP solutions". At the bottom, there is a section for "ORACLE JD EDWARDS" and a list of services: "Oracle JD Edwards >", "Oracle JD Edwards ERP", "Oracle JD Edwards Add-ons", and "Oracle JD Edwards Commodity Trade".

[Cadran | Oracle ERP Specialist for Wholesale & Industry](#)

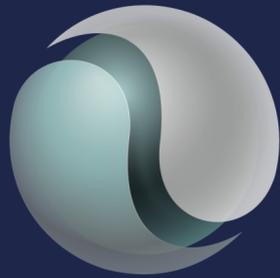
JD Edwards Nordic Conference 2024

In-Memory Sales Advisor

From release 9.2 of JD Edwards EnterpriseOne, In-Memory Sales Advisor is merged into the base code line. Additional ESUs are not needed to begin using In-Memory Sales Advisor.

For older releases, there are a number of ESUs that needs to be installed.

If you are on an older release, contact Customer Support as you begin the installation process to ensure you will be able to download patches for In-Memory Sales Advisor from the Update Center.



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