رواد مصر الرقمية

NEXT
CAREER DEVELOPMENT ACADEMY

وزارة الاتصالات
وتكنولوجيا المعلومات

DEPI Final Project
Technical Final Project

Implementation of Oracle SCM EBS in MH GROUP

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Group Name: NEXT12_ONL1_ERP2_M1e

Track name: Oracle Digital Supply Chain Management

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Project Introduction for MH GROUP

MH GROUP is a leading company in the field of diverse products and services, dedicated to providing innovative solutions to its clients by efficiently managing its operational processes. As the company continues to expand and increase the scale of its operations, the need for a comprehensive system to manage the supply chain has become crucial in ensuring optimized logistics, inventory management, and resource control.

To meet this growing demand, **MH GROUP** has adopted **Oracle SCM EBS** as a strategic solution for managing its supply chain and related processes. This integrated system offers modern tools and technologies that enable the company to improve planning, procurement, inventory, and manufacturing operations with high efficiency, enhancing its competitive edge in the market.

This project will present detailed steps on how to implement Oracle SCM EBS within **MH GROUP**, focusing on streamlining operations, reducing costs, and improving demand forecasting accuracy, ultimately contributing to sustainable growth for the company.

Project Objectives

Provide a Demonstration for MH GROUP

The primary objective of this project is to present a demonstration that showcases the capabilities of Oracle Supply Chain Modules tailored for MH GROUP.

Enhance Operational Processes

The system aims to enhance operational processes by integrating various aspects of the supply chain, ensuring smoother workflows and improved management

Integrate Supply Chain Elements

The demonstration will cover key components of the supply chain, including user management, products, customers, and suppliers, to provide a comprehensive overview.

Improve Efficiency and Reduce Errors

The ultimate goal is to improve overall efficiency and reduce operational errors, leading to better performance and customer satisfaction.

Defining Organization

Determine the organizational structure of an enterprise and define the operating unit, inventory organization, sub-inventory, and locator in the context of Oracle SCM EBS, follow these steps:

- **Operating Unit:** it will be named with the same name as the organization or can be defined as "**MH GROUP Operations**" to make it clear that it is the basic operational unit.
- **Defining Inventory Organizations:** At this stage, Inventory Organizations will be created which are the different stores that will cover different activities. These stores will include PVC pipe activity, polyethylene pipe activity, carbonate activity, foam, and bags.
- **Defining Sub-Inventories:** Under each Inventory Organization, Sub-Inventories are defined which are the sub Inventory that store the materials associated with each activity.
- **Definition of Locators:** For more precise organization within Inventory, Locators can be defined under the sub Inventory of the activity of carbonates, foams and packaging.

MH GROUP Operations
Operating unit
Master Organization (MHG)
PVC Pipe Warehouse (PV1)
Polyethylene Pipe Warehouse (PE1)
Calcium Carbonate Warehouse (CA1)
Foam and Pacing Warehouse (PK1)
inventory organization
PVC Raw Materials
PVC Finished Goods
Poly Raw Materials
Poly Finished Goods
Calcium Raw Materials
Calcium Finished Goods
Foam Materials
Foam and Pacing
Sub Inventory
Locator 1
Locator 1
Locator 2
Locator 1
Locator 1
Locator

Inventory Management

To Enable Egypt Still And EGP Currency

General Ledger Super User > Setup > Currencies > Define

Global HRMS Manager View> Requests > International HRMS Setup

Location Address Style

Inventory > Setup > Flexfields > Descriptive > Segments

Application: Human Resources Tittle: Location Address

Segments Summary (Location Address) - Egypt

Country list Of Value = PER_TERRITORIES

Create Locations

Global HRMS Manger > Work Structures > Location

Create Operating unit (MH Group)

Global HRMS Manger > Work Structures > Organization > Description

Replicate Seed Data

System Administrator > Requests

Run Request = Replicate Seed Data

هنا بقول ان ال operating unit محتاجها تسمع معايا في جميع الموديول

Define Your Own Inventory Responsibility same As Inventory

System Administrator > Security > Responsibility > Define

Add Profile Option For New Responsibility

System Administrator > Profile > System

Profile Option Name	Value
HR: Security Profile	Vision Corporation
HR:BusinessGroup	Vision Corporation
HR:User Type	HR with Payroll User
MO: Default Operating Unit	MH Group
MO: Operating Unit	MH Group
MO: Security Profile	Vision Corporation
GL Ledger Name	Vision Operations(USA)

Assigning responsibility to users

System Administrator > Security > User > Define

Define workday calendar in a MH Group

MH Inventory G > Setup > Organization > calendar

Workday pattern

The first step in Inventory implementation is to design the flex field structures.

MH Inventory G > Setup > Flexfields > Key > Segments

Find > Application : Inventory > Stock Locators

Define Master Organization

MH Inventory G > Setup > Organization > Organization

Define Inventory Parameter For Inventory Organization

MH Inventory G > Setup > Organization > Organization

Define and update the default inventory and cost parameters of the MH group Enterprise in the following areas:

1. Inventory Parameters
2. Costing Information
3. Other Account Parameters
4. Revision, Lot, Serial, LPN Parameters
5. ATP, Pick, Item–Sourcing Parameters
6. Defining Inter–Organization Information
7. Defining Warehouse Parameters

Inventory Parameters

- Organization code MHG
- Item Master organization MH MST ORG
- Workday calendar MH C
- locator control option: Determined at subinventory level

Costing Information

- Costing Method AVERAGE
- Transfer to GL YES
- Valuation Account:-

Account Type	Account
Material	000-0000-1410-000-01
Outside processing	000-0000-1450-000-01
Material Overhead	000-0000-1420-000-01
Overhead	000-0000-1430-000-01
Resource	000-0000-1440-000-01
Expense	000-0000-7530-520-01

Revision, Lot, Serial, LPN Parameters

- Starting revision A
- Lot Number None
- Generation At item level
- Serial Number :-
  - uniqueness Within inventory items
  - Generation At item level

Other Account Parameters

Account Type	Account
Purchase Price Variance	000-0000-5210-520-01
Invoice Price Variance	000-0000-5220-520-01
Inventory AP Accrual	000-0000-2220-000-01
Sales	000-0000-4110-520-01
Cost of Goods Sold	000-0000-5110-450-01
Deferred COGS Account	000-0000-5110-450-01
Cost Variance Account	000-0000-1410-000-01

These steps will be duplicated for organizations PV1 , PE1 , CA1 and PK1
Use Organization Copy Functionality

1- inventory organization Polyethylene Pipe (PE1)

Load interface tables:

MH Inventory G > Setup > Organization > Organization Copy > Maintain Interface

Copy Organizations:

MH Inventory G > Setup > Organization > Organization Copy > launch Organization Copy

2- inventory organization Calcium Carbonate (CA1)

Load interface tables:

MH Inventory G > Setup > Organization > Organization Copy > Maintain Interface

Copy Organizations:

MH Inventory G > Setup > Organization > Organization Copy > launch Organization Copy

2- inventory organization Foam and Pacing (PK1)

Load interface tables:

MH Inventory G > Setup > Organization > Organization Copy > Maintain Interface

Copy Organizations:

MH Inventory G > Setup > Organization > Organization Copy > launch Organization Copy

Organization Access

MH Inventory G > Setup > Organization > Organization Access

Subinventories > PV1

MH Inventory G > Setup > Organization > Subinventories

Adding Subinventory to the inventory organization (Pv1) > (FG)

New

Header

1. **Subinventory Name :** FG
2. **Description :** Finished Goods
3. **Status :** Active
4. **Type :** Storage

Main - Parameters

Following are the important parameters that we must d

1. **Quantity tracked:** yes
2. **Asset Subinventory :** yes
3. **Locator Control :** None

Adding Subinventory to the inventory organization (Pv1) > (RM)

New

Header

1. **Subinventory Name :** RM
2. **Description :** Raw Materials
3. **Status :** Active
4. **Type :** Storage

Main - Parameters

Following are the important parameters that we must d

1. **Quantity tracked:** yes
2. **Asset Subinventory :** yes
3. **Locator Control :** None

Subinventories > PE1

MH Inventory G > Setup > Organization > Subinventories

Adding Subinventory to the inventory organization (PE1) > (FG)

New

Header

1. **Subinventory Name :** FG
2. **Description :** Finished Goods
3. **Status :** Active
4. **Type :** Storage

Main - Parameters

Following are the important parameters that we must d

1. **Quantity tracked:** yes
2. **Asset Subinventory :** yes
3. **Locator Control :** None

Adding Subinventory to the inventory organization (PE1) > (RM)

New

Header

1. **Subinventory Name :** RM
2. **Description :** Raw Materials
3. **Status :** Active
4. **Type :** Storage

Main - Parameters

Following are the important parameters that we must d

1. **Quantity tracked:** yes
2. **Asset Subinventory :** yes
3. **Locator Control :** None

Subinventories > CA1

MH Inventory G > Setup > Organization > Subinventories

Adding Subinventory to the inventory organization (CA1) > (FG)

New

Header

1. **Subinventory Name :** FG
2. **Description :** Finished Goods
3. **Status :** Active
4. **Type :** Storage

Main - Parameters

Following are the important parameters that we must d

1. **Quantity tracked:** yes
2. **Asset Subinventory :** yes
3. **Locator Control :** **Prespecifed**

Adding Subinventory to the inventory organization (PE1) > (RM)

New

Header

1. **Subinventory Name :** RM
2. **Description :** Raw Materials
3. **Status :** Active
4. **Type :** Storage

Main - Parameters

Following are the important parameters that we must d

1. **Quantity tracked:** yes
2. **Asset Subinventory :** yes
3. **Locator Control :** **Prespecifed**

Subinventories > PK1

MH Inventory G > Setup > Organization > Subinventories

Adding Subinventory to the inventory organization (PK1) > (FG)

New

Header

1. **Subinventory Name :** FG
2. **Description :** Finished Goods
3. **Status :** Active
4. **Type :** Storage

Main - Parameters

Following are the important parameters that we must d

1. **Quantity tracked:** yes
2. **Asset Subinventory :** yes
3. **Locator Control :** **Prespecifed**

Adding Subinventory to the inventory organization (PK1) > (RM)

New

Header

1. **Subinventory Name :** RM
2. **Description :** Raw Materials
3. **Status :** Active
4. **Type :** Storage

Main - Parameters

Following are the important parameters that we must d

1. **Quantity tracked:** yes
2. **Asset Subinventory :** yes
3. **Locator Control :** **Prespecifed**

Report on the knowledge of sub-inventory OR locator (CA1)

MH Inventory G > Reports > All

ORACLE
Calcium Carbonate

Locator Listing

Report Date: 12-OCT-2024 09:56
Page 1 of 1

Locator	ROW.1001...	**Description**		**Disable Date**	
Subinventory	FG		**Maximum Units**		
Picking Order			**Maximum Volume**		
Volume Unit			**Maximum Weight**		
Weight Unit					
Locator	ROW.2001...	**Description**		**Disable Date**	
Subinventory	FG		**Maximum Units**		
Picking Order			**Maximum Volume**		
Volume Unit			**Maximum Weight**		
Weight Unit					
Locator	ROW.3001...	**Description**		**Disable Date**	
Subinventory	RM		**Maximum Units**		
Picking Order			**Maximum Volume**		
Volume Unit			**Maximum Weight**		
Weight Unit					

End of Report

Units of Measure

MH Inventory G > Setup > Units of Measure > Classes

PV1 – PE1 > FG

Unit of Measure Classes

Name	Description	Base Unit	UOM	Inactive On	[ ]
PVC MHG	PVC MHG	MT	MT		

Conversions | Units of Measure

CA1 > FG And RM

Unit of Measure Classes

Name	Description	Base Unit	UOM	Inactive On	[ ]
CA1	Calcium Carbonate	TNE	TNE		

Conversions | Units of Measure

PK1 > FG

Unit of Measure Classes

Name	Description	Base Unit	UOM	Inactive On	[ ]
PK1	Foam and Pacing	Thousand	TH		

Conversions | Units of Measure

Units of Measure > UOM from UOM Class FORM

Units of Measure - PVC MHG

Name	UOM	Description	Base Unit	Inactive On	[ ]
MT	MT	MT	✓		
PC	PC	PC			
KG	KIL	KG			

Units of Measure - CA1

Name	UOM	Description	Base Unit	Inactive On	[ ]
TNE	TNE	TNE	✓		
KIL	K.G	KGM			

Units of Measure - PK1

Name	UOM	Description	Base Unit	Inactive On	[ ]
Thousand	TH	Thousand	✓		
PK PC	PIC	Pieces			

Units of Measure Conversions

Unit of Measure Conversions - PVC MHG

Standard | Intra-class | Inter-class

Unit	Class	= Conversion	x Base Unit	Inactive On
MT	PVC MHG	1	MT	
PC	PVC MHG	6	MT	
	PVC MHG		MT	

1 _____ = _____ x MT

Unit of Measure Conversions - CA1

Standard | Intra-class | Inter-class

Unit	Class	= Conversion	x Base Unit	Inactive On
TNE	CA1	1	TNE	
KIL	CA1	.001	TNE	

1 KIL = .001 x TNE

Unit of Measure Conversions - PK1

Standard | Intra-class | Inter-class

Unit	Class	= Conversion	x Base Unit	Inactive On
Thousand	PK1	1	Thousand	
PK PC	PK1	1000	Thousand	

1 PK PC = 1000 x Thousand

Default Primary Units of Measure

System Administrator > Profile > System

- Responsibility MH Inventory G
- Profile INV: Default Primary Unit of Measure

Items Templets (FG PVC)

MH Inventory G > Setup > Items > Templets

New

Copy Templets

Tools > Copy Templets > Purchased Item

Tools Window Help

- Copy Template...
- Serial Tagging Assignment
- Material Classification Tagging Assignment

Copy Template

Template: Purchased Item — Purchased Item

Copy Attributes

Overwrite | Append | Overwrite Not Null

Main	Receiving	Order Entry
Inventory	Physical Attributes	Invoicing
Bills of Material	General Planning	Service
Asset Management	MPS/MRP Planning	Web Option
Costing	Lead Times	Process Manufacturing
Purchasing	Work in Process	

Clear (J) | Cancel | Apply | Done (F)

Item Template (PE1)

Template: FG PVC — Description: Finished Goods PVC

Organization: [ ]

Show: Main

Attribute Name	Controlled At	Value	Enabled
User Item Type	Org	Finished good	☑
Item Status	Master	Active	☑
Primary Unit of Measure	Master	MT	☑
Conversions	Master	Both standard and item specific	☑
Description	Master	Pipe PVC -	☑
Global Descriptive Flexfield	Org		☐
Tracking UOM Indicator	Master	Primary & Secondary	☑
Pricing UOM Indicator	Master	Primary	☑
Defaulting Control	Master	Fixed	☑
Secondary Unit of Measure	Master	PC	☑

Copy Template

Template: FG PVC — Finished Goods PVC

Copy Attributes

Overwrite | Append | Overwrite Not Null

Main	Receiving	Order Entry
Inventory	Physical Attributes	Invoicing
Bills of Material	General Planning	Service
Asset Management	MPS/MRP Planning	Web Option
Costing	Lead Times	Process Manufacturing
Purchasing	Work in Process	

Clear (J) | Cancel | Apply | Done (F)

Item Template (MHG)

Template: FG PE — Description: Poly Finished Goods

Organization: MHG — MH MST ORG

Show: All Groups

Attribute Name	Controlled At	Value	Enabled
User Item Type	Org	Finished good	☑
Item Status	Master	Active	☑
Primary Unit of Measure	Master	MT	☑
Conversions	Master	Both standard and item specific	☑
Description	Master	Pipe PE -	☑
Global Descriptive Flexfield	Org		☐
Tracking UOM Indicator	Master	Primary & Secondary	☑
Pricing UOM Indicator	Master	Primary	☑
Defaulting Control	Master	Fixed	☑
Secondary Unit of Measure	Master	PC	☑

Catalog Groups

MH Inventory G > Setup > Item > Catalog Groups

Revision Control

Create New Item

MH Inventory G > Items > Master Items

Create New Item

MH Inventory G > Items > Master Items

Item	Description	Master Item	Org Assigned	Copy Templet	Note
FGPV 110*7.3	Pipe PVC - WH 110*7.3	MHG	PV1	FG PVC	
FGPV 110*5.3	Pipe PVC - WH 110*5.3	MHG	PV1	FG PVC	
FGPV 315*15	Pipe PVC - WH 315*15	MHG	PV1	FG PVC	
FGPV 140*10.4	Pipe PVC - 140*10.4	MHG	PV1	FG PVC	Revision Control
FGPE 1200*316	**PipeGroup**.PE.1200*316.Black	MHG	PE1	FG PE	Catalog Groups
RMPV 67	RM PVC 67	V1	M1 – M2	Purchased item	
RMPE SABIK	RM POLY SABIK	V1	M1 – M2	Purchased item	

Open First Inventory Period

MH Inventory G > Accounting Close Cycle > Inventory Accounting Periods

Status	Period	Num	Year	Period Dates From	Period Dates To	Close Date
Future	Oct-00	10	2000	01-10-2000	31-10-2000	
Future	Sep-00	9	2000	01-09-2000	30-09-2000	
Future	Aug-00	8	2000	01-08-2000	31-08-2000	
Future	Jul-00	7	2000	01-07-2000	31-07-2000	
Future	Jun-00	6	2000	01-06-2000	30-06-2000	
Future	May-00	5	2000	01-05-2000	31-05-2000	
Future	Apr-00	4	2000	01-04-2000	30-04-2000	
Future	Mar-00	3	2000	01-03-2000	31-03-2000	
Future	Feb-00	2	2000	01-02-2000	29-02-2000	
Open	Jan-00	1	2000	01-01-2000	31-01-2000	

Purchasing

Create A New Responsibility

System Administrator > Security > Responsibility > Define

Add Profile Option For New Responsibility

System Administrator > Profile > System

Profile Option Name	Value
HR: Security Profile	Vision Corporation
HR:Business Group	Vision Corporation
HR:User Type	HR with Payroll User
MO: Default Operating Unit	MH Group
MO: Operating Unit	MH Group
MO: Security Profile	Vision Corporation
GL Ledger Name	Vision Operations(USA)

Assigning responsibility to users

System Administrator > Security > User > Define

Define Financials Options For MH Group

MHG Purchasing > Setup > Organization > Financials Options

GL Account	Account Number
Liability	01-000-2210-0000-000
Prepayment	01-000-1340-0000-000
Bills Payable	01-000-2580-0000-000
Discount Taken	01-740-7825-0000-000
PO Rate Variance Gain	01-740-7842-0000-000
PO Rate Variance Loss	01-740-7844-0000-000
Miscellaneous	01-000-7740-0000-000
Retainage	01-000-2210-0000-000

Organization Access

MH Inventory G > Setup > Organization > Organization Access

Defining Receiving Options

MHG Purchasing > Setup > Organization > Receiving Options

Inventory Organization : pvc pipe > pv1

ORACLE

Logged In As TAREK

Confirmation

Your changes have been saved.

Receiving Options

Inventory Organization: PVC PIPE | Go | Cancel | Save

* Indicates required field

Enforce Ship-To	None
ASN Control Action	None
* Receipt Days Early	10
* Receipt Days Late	10
Receipt Days Exceed-Action	Warning
* Over Receipt Tolerance (%)	5
Over Receipt Action	Warning
RMA Receipt Routing	Standard Receipt
Receipt Routing	Standard Receipt

☐ Allow Substitute Receipts

☑ Allow Unordered Receipts
☐ Allow Express Transactions
☐ Allow Cascade Transactions
☐ Allow Blind Receiving
☑ Validate Serial Numbers on RMA Receipts

Receipt Number Generation	Automatic
Receipt Number Type	Alphanumeric
* Next Receipt Number	1
Validate Lots on RMA Receipts	Restricted

Accounting

* Receiving Inventory Account	01-000-1420-0000-000
	Company-Departmen-Account-Sub-Account-Product
Retroactive Price Adjustment Account	
	Company-Departmen-Account-Sub-Account-Product
* Clearing Account	01-000-1430-0000-000
	Company-Departmen-Account-Sub-Account-Product

Cost Factors

☐ Interface to Advanced Pricing
☐ Interface to Transportation Execution

Activate Windows
Go to Settings to activate Windows.

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Similarly, it is also applied to the rest of the Inventory Organization

Create Person

Global HRMS Manger > People > Enter and Maintain

Default Hierarchy

Purchasing super user > Setup > Purchasing > Document Types

Document Types

Operating Unit Vision Operations Go

Create | •••

Type	Name	Document Type Layout	Contract Terms Layout	Update	Delete
Sourcing RFI Sourcing RFI	Sourcing RFI	Sourcing Style Sheet	Oracle Contract Terms Template		
Auction Buyer Auction	Sourcing Buyer Auction	Sourcing Style Sheet	Oracle Contract Terms Template		
Sourcing RFQ Sourcing RFQ	Sourcing RFQ	Sourcing Style Sheet	Oracle Contract Terms Template		
Solicitation Solicitation	Solicitation	Sourcing Style Sheet	Oracle Contract Terms Template		
Purchase Order Standard	Standard Purchase Order	Standard Purchase Order Stylesheet with Logo	Oracle Contract Terms Template		
Purchase Agreement Blanket	Blanket Purchase Agreement	Blanket Agreement Stylesheet with Logo	Oracle Contract Terms Template		
Purchase Agreement Contract	Contract Purchase Agreement	Contract Agreement Stylesheet with Logo	Oracle Contract Terms Template		
Release Blanket	Blanket Release	Blanket Release Stylesheet with Logo			
Purchase Order Planned	Planned Purchase Order				
Release Scheduled	Scheduled Release				
Request for Quotation Standard	Standard RFQ				
Request for Quotation Catalog	Catalog RFQ				
Request for Quotation Bid	Bid RFQ				
Requisition Internal	Internal Requisition				
Change Order Request Requisition	Change Order Request: Requisition				
Quotation Bid	Bid Quotation				
Quotation Catalog	Catalog Quotation				
Quotation Standard	Standard Quotation				
Requisition Purchase	Purchase Requisition				

Table Diagnostics

Diagnostic Console

ORACLE Purchasing | Logged In As TAREK

Update Document Type: Requisition Purchase for Vision Operations

Cancel Apply

* Indicates required field

* Document Name Purchase Requisition

Approval

- [x] Owner Can Approve
- [x] Approver Can Modify
- [ ] Can Change Forward-To
- [ ] Can Change Forward-From
- [ ] Can Change Approval Hierarchy

Approval Workflow: PO Requisition Approval
Workflow Start Process: Main Requisition Approval
Approval Transaction Type:
Forward Method: Hierarchy
Default Hierarchy: Master Reporting Hierarchy

Control

Security Level: Public
Access Level: Full
Autocreate Workflow: PO Create Documents
Autocreate Workflow Start Process: Overall Document Creation/Launch A

- [x] Use Contract Agreements for Auto-Sourcing
- [ ] Include Non-Catalog Requests

Spot Buy Options

Spending Limit (USD)

Category	Threshold Limit (USD)	Delete
No results found.		

Table Diagnostics

Diagnostic Console

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Position Hierarchy

Global HRMS Manger > Work Structures > Position > Hierarchy

Create Requisitions

Purchasing super user > Requisitions > Requisitions

Order Management

Create Sales Person

CRM Administrator, Vision Enterprises > Resource Manger > Maintain Resource > Import Resources

Create a new Customer

Order Management Super User, Vision Operations (USA) > Customers > Standard

Create Price List

Oracle Pricing Manager, Global > Price Lists > Price List Setup

Modifier – Discount List

Oracle Pricing Manager, Global > Modifier > Modifier Setup

Advanced Pricing - Define Modifier

Main | Advanced | Other

Type: Discount List
Name: MHG Discount List
Version:
Currency: USD

Number: MHG
☑ Active ☑ Automatic
☐ Global
Operating Unit: Vision Operations
Start Date: 02-11-2024 -
Description: MHG Discount List

List Limits | List Qualifiers

Modifiers Summary | Discounts/Charges | Promotion Upgrades | Promotion Terms | Coupons | Price Breaks*

Modifier No	Level	Modifier Type	Formula	Application Method	Value	Accru
order_disc	Order	Discount		Percent	20	☐

Line Limits | Exclude | Pricing Attributes | Line Qualifiers | Define Details*

Default Rule – Order Header

Correct validation field

Order Management Super User, Vision Operations (USA) > Setup > Rules > Defaulting

Defaulting Setup - Entity Attributes

Application: Order Management
Entity: Order Header

Defaulting Condition Templates...

Attributes

Defaulting Sequence	Attribute	Include in Building Defaulting Conditions
4	Agreement	☑
5	Bill To	☑
6	Price List	☑
8	Request Date	☑
40	Credit Card Number	☐
50	Accounting Rule	☑
50	Accounting Rule Duration	☑

Defaulting Rules...

Attribute Defaulting Rules

Application: Order Management
Entity: Order Header
Attribute: Price List

Defaulting Conditions

Precedence	Defaulting Condition	Enabled	Seeded
1	Always	☐	☑
2	Order Type = Ship Only for Lease	☑	☐
3	Order Type = Return Only from Lease	☑	☐
5	Always	☑	☐

Default Sourcing Rules

Sequence	Source Type	Default Source/ Value
5	Related Record	Sales Agreement Header.Price List
10	Related Record	Agreement.Price List
20	Related Record	Ship To.Price List
30	Related Record	Order Type.Price List
40	Constant Value	MHG Price List Oct

Tools Window Help

Generate Defaulting Handler Package

Requests

Refresh Data | Find Requests | Submit a New Request | Submit New Request Set
Auto Refresh (X) | Copy Single Request | Copy Request Set

Request ID	Name	Parent	Phase	Status	Parameters
7950594	Defaulting Generator		Completed	Normal	660, OE_AK_ORDER_HEADE
7950584	DQM Serial Sync Index Pr		Completed	Normal	

Hold Request | View Details | Rerun Request | View Output
Cancel Request | Diagnostics | Reprint/Republish (J) | View Log (K)

Sales Orders (Vision Operations) - [New]

Order Information | Line Items

Main | Others

Customer	Petrojet	Order Number	
Customer Number	9084	Order Type	Mixed
Customer PO		Date Ordered	02-11-2024 14:18:58
Customer Contact		Price List	MHG Price List Oct
Ship To Location	21831	Salesperson	Ahmed Tarek,
	102 N. LaSalle	Status	
		Currency	USD
	Chicago, IL, 60610, US	Subtotal	0.00
Bill To Location	21830	Tax	0.00
	102 N. LaSalle	Charges	0.00
		Total	0.00
	Chicago, IL, 60610, US		

Actions | Related Items | Configurator | Availability | Book Order

Create Transaction Type

Order Management Super User, Vision Operations (USA) > Setup > Transaction Types > Define

Transaction Types

Operating Unit	Vision Operations	Transaction Type	MHG Sales
Description	MHG Sales Type	Sales Document Type	Sales Order
Order Category	Mixed	Transaction Type Code	Order
Fulfillment Flow	Order Flow - Generic	Negotiation Flow	Negotiation Flow - Gene
Effective Dates	01-01-2000 -	Default Transaction Phase	Fulfillment
Layout Template	Sales Order RTF Templa		[.]
Contract Template			

☑ Retain Document Number

☐ Use Approvals Management Engine

Approvals | Validate Workflow | Assign Line Flows

Main | Shipping | Finance

Document

Agreement Type		Default Return Line Type	
☐ Agreement Required		Default Order Line Type	MHG Standard line
☐ Purchase Order Required			

Pricing

☐ Enforce List Price		Price List	
		Minimum Margin Percent	

Credit Check Rule

Ordering	Booking	Packing	
Picking/Purchase Release		Shipping	

Credit Card

Reversal of Credit Card Authorization and Re-authorization

Requests

Refresh Data | Find Requests | Submit a New Request | Submit New Request Set

☐ Auto Refresh (X) | Copy Single Request | Copy Request Set

Request ID	Name	Parent	Phase	Status	Parameters
7950754	Validate OM Workflow		Completed	Normal	4282
7950599	Defaulting Generator		Completed	Normal	660, OE_AK_ORDER_HEADE
7950598	Defaulting Generator		Completed	Normal	660, OE_AK_ORDER_HEADE
7950597	Defaulting Generator		Completed	Normal	660, OE_AK_ORDER_HEADE
7950594	Defaulting Generator		Completed	Normal	660, OE_AK_ORDER_HEADE
7950584	DQM Serial Sync Index Pr		Completed	Normal	

Hold Request | View Details | Rerun Request | View Output

Cancel Request | Diagnostics | Reprint/Republish (J) | View Log (K)

Line Workflow Assignments

Order Type: MHG Sales

Assign Workflow Processes

Line Type	Item Type	Process Name	Start Date	End Date
MHG Standard line		Line Flow - Generic	01-01-2000	

OK | Cancel

Transaction Sequences and Assignments

Order Management Super User, Vision Operations (USA) > Setup > Documents

Add Permission to Pick Release

Order Management Super User, Vision Operations (USA) > Setup > Grants and Role Definitions > Grants

Uncheck the “Auto Create Deliveries” and “Auto Allocate” Option

Order Management Super User, Vision Operations (USA) > Setup > Shipping Parameters

Order Management

Order to Cash Lifecycle

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Create Sales Order

Order Management Super User, Vision Operations (USA) > Orders, Returns > Sales Order

Create Sales Order

Order Management Super User, Vision Operations (USA) > Shipping > Transactions

Pick Release

Auto create Deliveries

Create Sales Order

Order Management Super User, Vision Operations (USA) > Inventory > Move Orders > Transact Move Orders

Transact Move Orders

Ship Confirm

Copy Sales Order

Order Management Super User, Vision Operations (USA) > Orders, Returns > Order Organizer

Defining Credit Check Rule

Order Management Super User, Vision Operations (USA) > Setup > Rules > Credit

Order Management Super User, Vision Operations (USA) > Orders, Returns > Sales Order

Create Sales Order

Order Management Super User, Vision Operations (USA) > Orders, Returns > Sales Order

Create Sales Order

Order Management Super User, Vision Operations (USA) > Shipping > Transactions

Pick Release

Auto create Deliveries

Create Sales Order

Order Management Super User, Vision Operations (USA) > Inventory > Move Orders > Transact Move Orders

Transact Move Orders

Ship Confirm