

USER MANUAL

Introduction:

This guide offers detailed, step-by-step instructions for executing inventory management, purchasing processes, and conducting various transactions within Oracle ERP R12.

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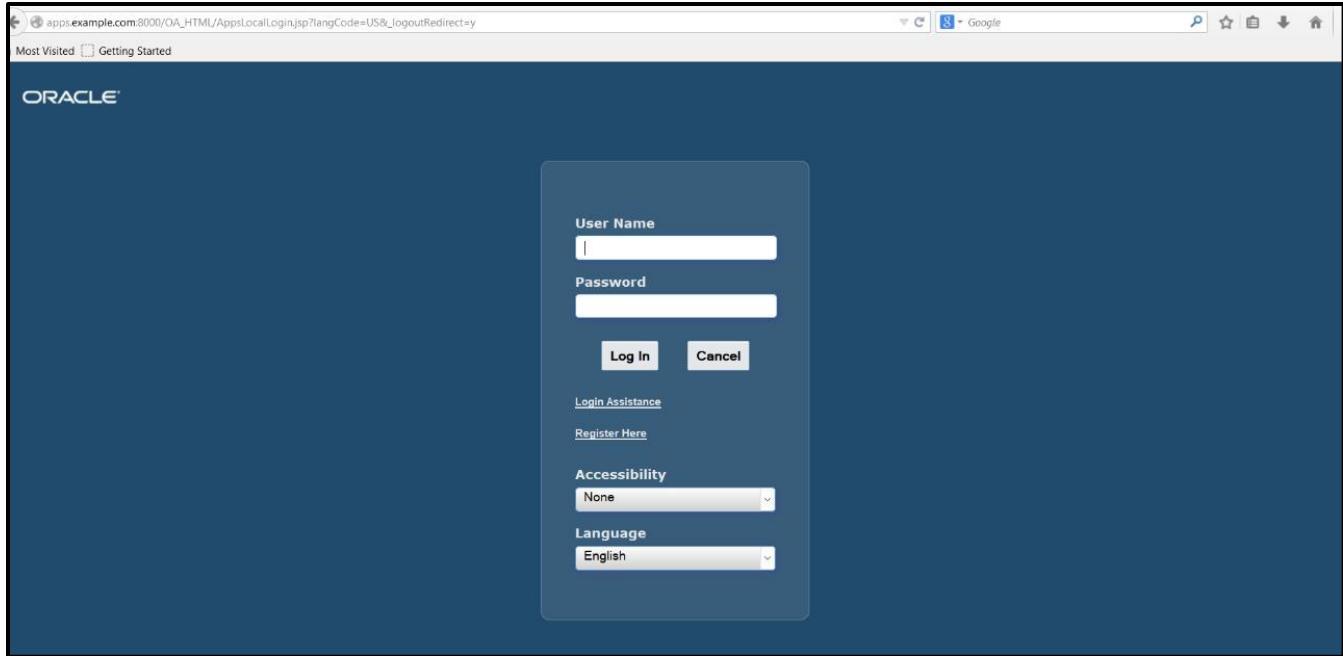
Page	Topic	Description
3	Application Shortcuts Keys	Reduce the time spent navigating menus, allowing you to perform tasks quickly and efficiently
4 - 7	Application login information and user interface	
	Item Definitions	
8 - 16	Define Item Attributes	Define key details that determine how an item behaves across different modules, like Inventory, Purchasing, and Order Management
17	Assigning Items to Organizations	Facilitates scalability, consistency, and smooth operation within multi-organizational setups
18	Assigning Items to Categories	Used for managing item category assignments
	Inventory Transactions	
19 - 24	Move Order Transactions	Transferring material within an organization. It helps manage inventory movement efficiently.
25 - 30	Physical Inventory Adjustments	Adjusts stock levels after a physical inventory check
	Purchasing Transactions	
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52 - 54	Contract Purchase Agreement	Establishes terms and conditions with a supplier without specifying the goods or services to be purchased. It serves as a framework for future transactions.
55 - 56	Approved supplier & approved supplier list	Vendors that have been authorized to provide goods to an organization
57 - 61	Min-Max Transactions	Help maintain inventory levels by automatically suggesting replenishment when stock falls below a predefined minimum level.

1- Application shortcuts:

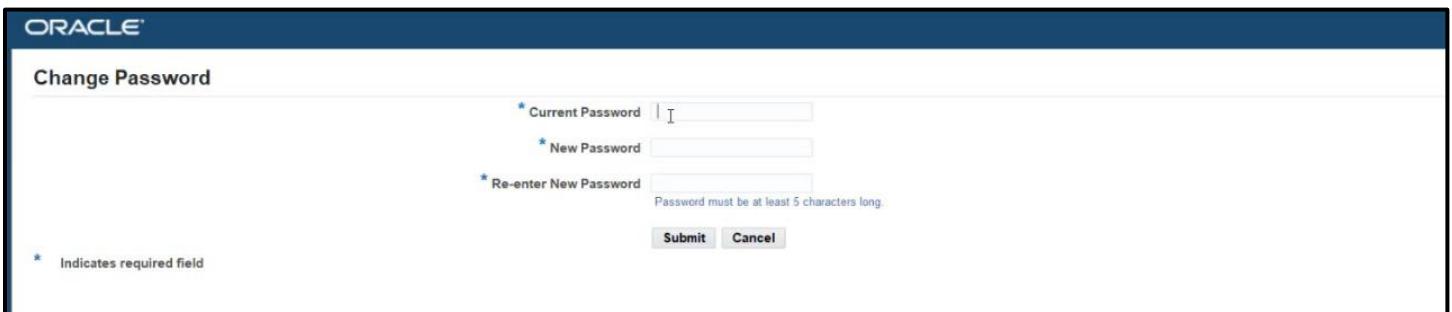
Function	Key
Actions LOV	Shift + Ctrl + F8
Clear Form	F8
Next Block	Shift + Page Down
Save	Ctrl + S
Delete Record	Ctrl + Up
Cut	Ctrl + X
Copy	Ctrl + C
Duplicate Field	Shift + F5
Duplicate Record	Shift + F6
Enter Query Mode	F11
Exit/Cancel Query	F4
List of Values	Ctrl + L
Help	Ctrl + H
Insert Record	Ctrl + Down
Clear Record	F6
Count Query	F12
Next Record	Down
Paste	Ctrl + V
Print	Ctrl + P
Previous Record	Up
Edit	Ctrl + E
Execute / Run Query	Ctrl + F11
Update Records	Ctrl + U
Insert Record	Ctrl + Down

2- Application login information and user interface:

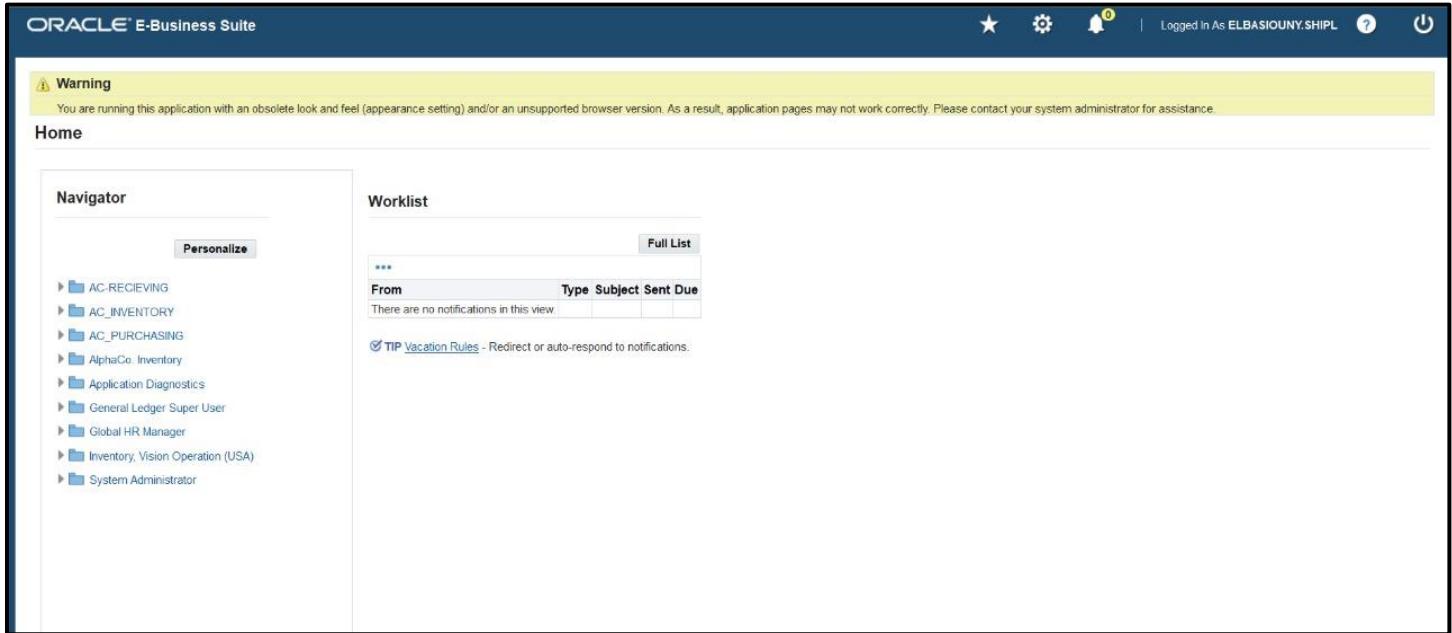
- 1- Open the Oracle Login Page and navigate to your organization's Oracle E-Business Suite (EBS) login URL.
- 2- Enter Your Credentials (**your Username and Password**) and click **Login** to proceed.



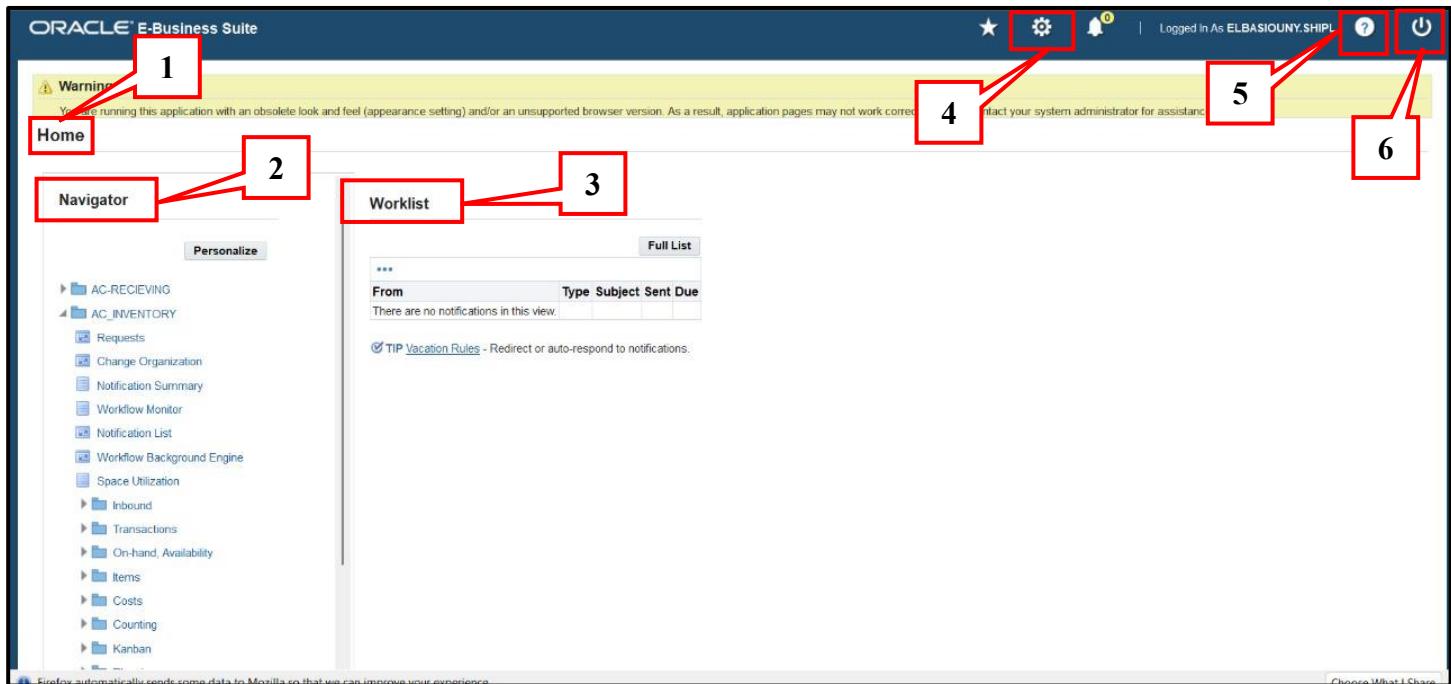
- 3- Type your **Current Password**, then type your **New Password** and **re-enter** it, then **submit**.



- 4- As soon as you log in, you will find the Oracle E-Business Suite interface that provides access to modules and features tailored to the user's permissions. This interface allows users to navigate the system, manage tasks, and receive alerts.

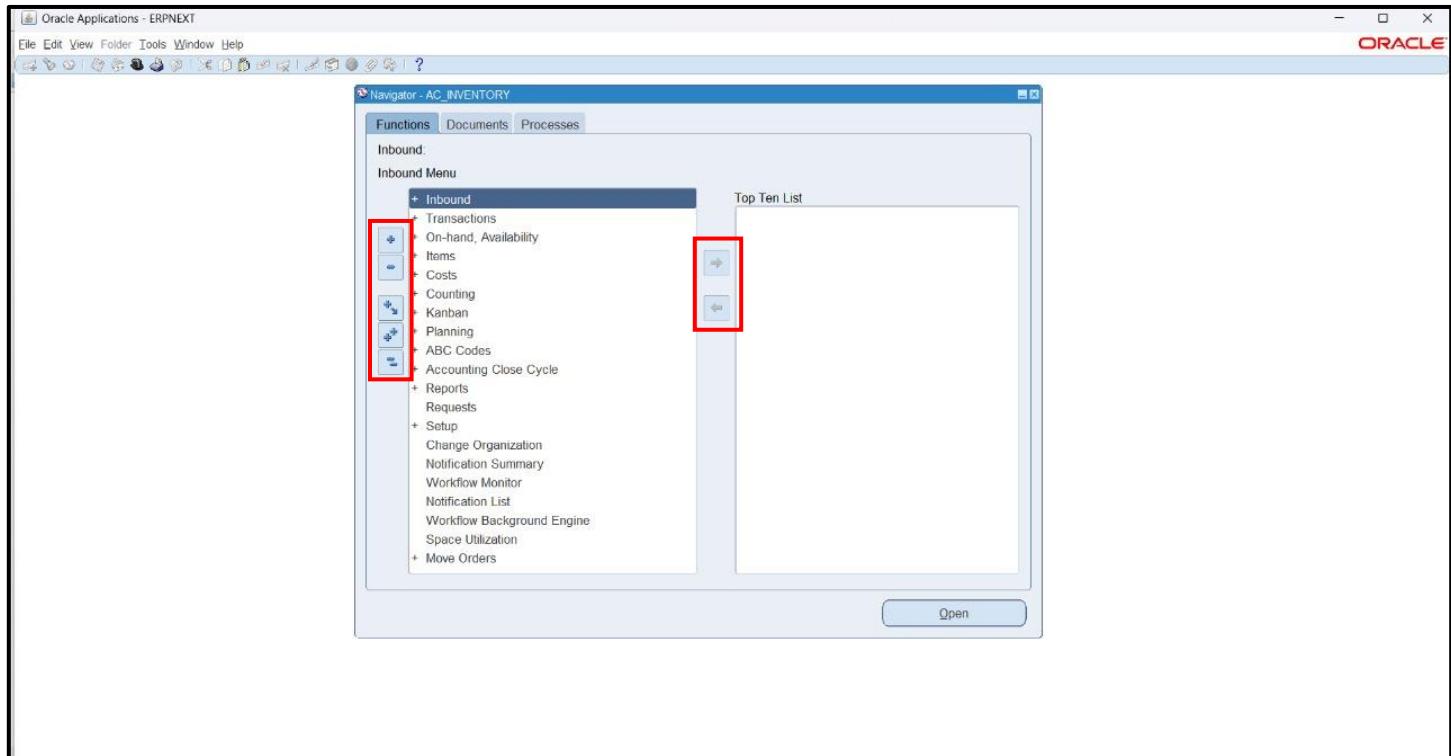


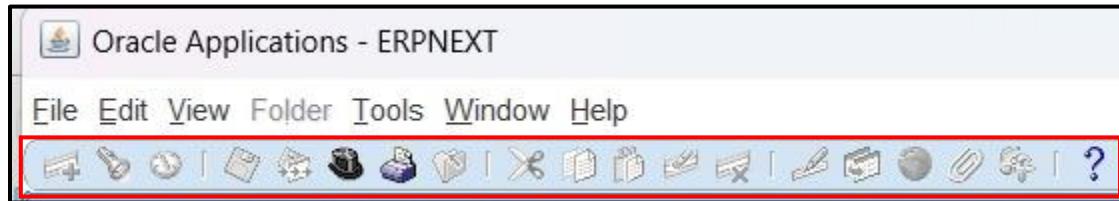
- 5- In this section, you will find the assigned responsibilities



1	Home Icon 	Returns to the main navigation page.	4	Settings Icon 	Allows customization of user preferences.
2	Navigator Icon 	Provides access to different modules like Purchasing, Inventory, and Receivables.	5	Logout Icon 	Logs the user out of the system.
3	Worklist Icon 	Displays pending notifications and approvals.	6	Help Icon 	Provides documentation or support links.

- 6- The Top Ten List is a feature that allows users to quickly access frequently used forms without navigating through multiple menus. Users can add up to ten functions to their Top Ten List.

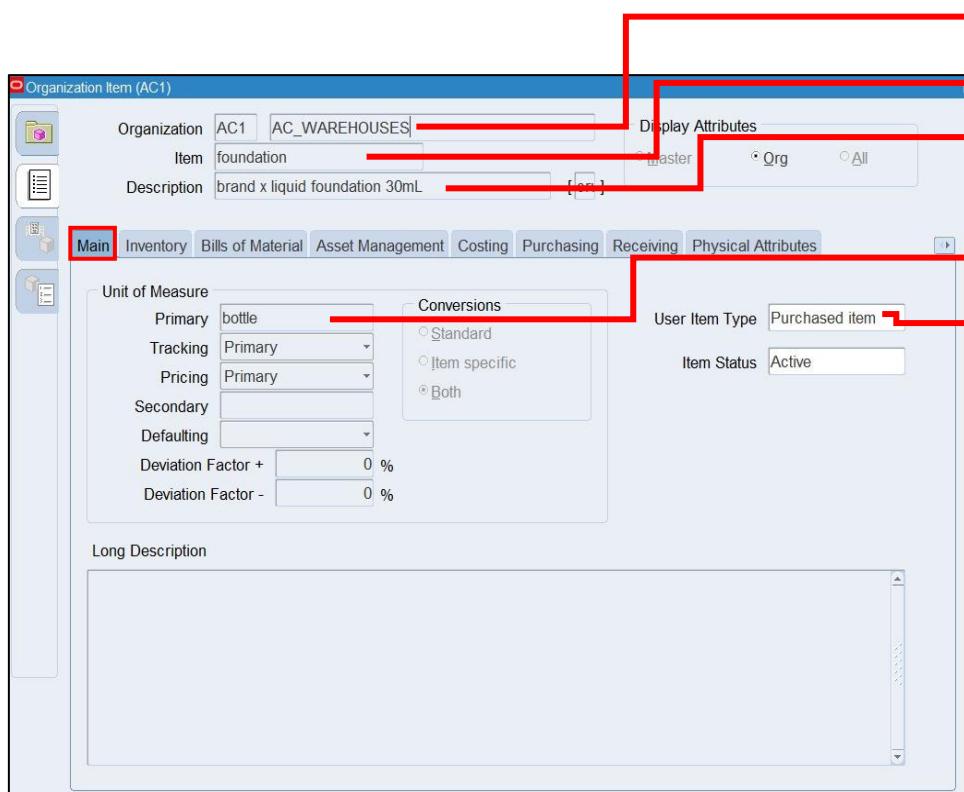




	Add a new record
	Enter the Query Mode
	Show Navigator
	Save button
	Switch Responsibility
	Edit a record
	Delete a record
	Clear a record
	Help

3- Item Definitions:

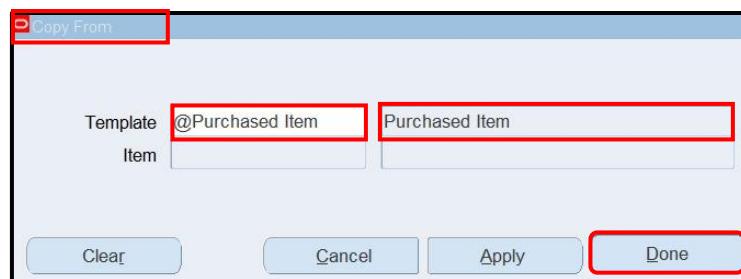
- Navigate to [Inventory > Items > Master Items or Organization Items screen](#)



The screenshot shows the 'Organization Item (AC1)' window. Key fields include:

- Organization:** AC1 / AC_WAREHOUSES (highlighted by a red box)
- Item:** foundation (highlighted by a red box)
- Description:** brand x liquid foundation 30mL (highlighted by a red box)
- Display Attributes:** Buttons for Master, Org, and All.
- Main Tab:** Selected tab (highlighted by a red box).
- Unit of Measure:** Primary: bottle, Tracking: Primary, Pricing: Primary, Secondary: (empty), Defaulting: (empty). Deviation Factor + and - are both 0 %.
- Conversions:** Standard, Item specific, Both (radio buttons).
- User Item Type:** Purchased item (highlighted by a red box).
- Item Status:** Active.
- Long Description:** Text area for detailed item description.

- **Note:** You can use the “Copy From” window to simplify item creation by copying attributes from a predefined template.
- Navigate to the [Inventory Responsibility > Master Items or Organization Items screen](#) > Query the item you want to work with > Open the Tools menu at the top of the window, and display the "Copy From" option listed.

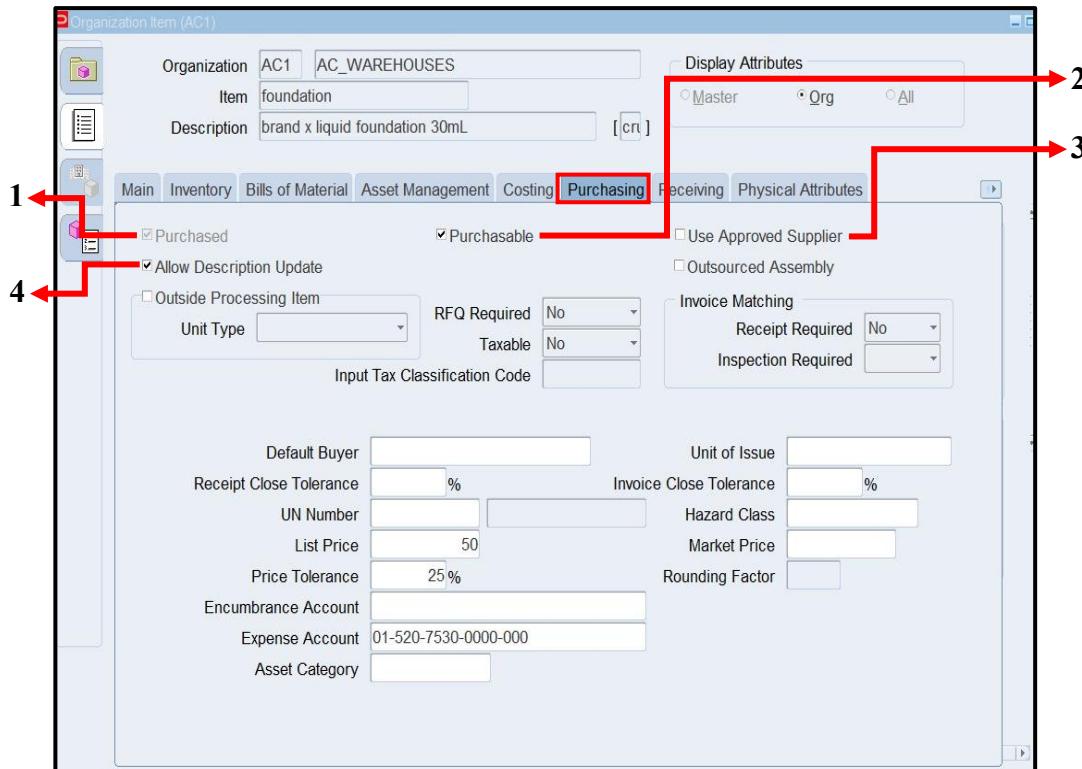


This window facilitates the process of applying predefined settings or configurations to new or existing items within an application.

Organization Item (AC1)

Organization	AC1 AC_WAREHOUSES	Display Attributes
Item	foundation	<input type="radio"/> Master <input checked="" type="radio"/> Org <input type="radio"/> All
Description	brand x liquid foundation 30mL	[cr]
Main	Inventory	3
	<input checked="" type="checkbox"/> Inventory Item	4
2	<input checked="" type="checkbox"/> Revision Control (D)	5
	<input checked="" type="checkbox"/> Stockable	6
	<input checked="" type="checkbox"/> Reservable (G)	
	Lot Expiration (Shelf Life)	
	Control: Shelf life days	7
	Shelf Life Days: 360	
	Retest Interval	
	Expiration Action Interval	
	Expiration Action	
	Lot	
8	Control: Full Control	
	Starting Prefix: LFND-	
	Starting Number: 0001	
	Maturity Days	
	Hold Days	
	Locator Control: Prespecified	
	<input type="checkbox"/> Restrict Subinventories	
	<input type="checkbox"/> Restrict Locators (J)	

1	Inventory Item	This attribute enables you to stock and transact the item.
2	Revision Control (D)	Allows you to track and manage changes to an item.
3	Stockable	Specifies whether the item can be stocked.
4	Reservable	Allows you to control whether an item can be reserved for specific orders or demands.
5	Transactable	Allows you to transact the Item in INV, OM, PO, or WIP.
6	Lot Expiration (Shelf Life)	Indicates whether expiration date tracking is required and defines the shelf life of the item, if applicable.
7	Serial	Determines whether serial number tracking is required.
8	Lot	Specifies whether lot control is enabled for the item.



- 1 **Purchased** Indicate whether to purchase and receive an item. Turning this option on allows you to set the Purchasable attribute.
- 2 **Purchasable** Indicates whether to order an item on a purchase order. You can set this only when **Purchasable** is turned on.
- 3 **Use Approved Supplier** Indicates whether to use only approved suppliers. If you turn this on, purchase orders will not be approved for an item if you do not use an approved supplier.
- 4 **Allow Description Update** Indicates whether to allow updates to the item description on a purchasing document line for an item.

Organization Item (AC1)

Organization	AC1	AC_WAREHOUSES	Display Attributes
Item	foundation	[cru]	<input type="radio"/> Master <input checked="" type="radio"/> Org <input type="radio"/> All
Description	brand x liquid foundation 30mL		
Costing Purchasing Receiving Physical Attributes General Planning MPS/MRP Planning Lead Times			
Inventory Planning Method		Min-Max	Planner
Subcontracting Component			Make or Buy
Min-Max Quantity		Order Quantity	Cost
Minimum	800	Minimum	Order
Maximum	3200	Maximum	Carrying %
Source		Safety Stock	
Type	Supplier	Method	Non-MRP Planned
Organization		Bucket Days	
Subinventory		Percent	
Order Modifiers			
Fixed Order Quantity		Fixed Days Supply	
Fixed Lot Multiplier			
Vendor Managed			
Replenishment Point	Order Quantity		

1	Inventory Planning Method	In this attribute, you select Not Planned , Min-Max , or Reorder Point . In this case, Min-Max is selected. It allows you to define a minimum quantity that you want on hand. When you reach this quantity, you reorder. You also define a maximum on-hand quantity that you do not want to exceed.
2	Make or Buy	Make : if the Item is manufactured within the organization. Buy : if the Item is purchased within the organization.
3	 <p>Source</p> <p>Type: Supplier</p> <p>Organization:</p> <p>Subinventory:</p>	<u>In the source type</u> , you select inventory , supplier , or sub-inventory . <u>In the source organization</u> , this attribute is controlled at the Organization level only. Enter the organization from which an internal requisition draws the item. <u>In the source sub-inventory</u> , this attribute is controlled at the Organization level only. Enter the sub-inventory within the source organization from which an internal requisition draws the item.

Organization Item (AC1)

Organization	AC1	AC_WAREHOUSES	Display Attributes
Item	foundation	<input type="radio"/> Master	<input checked="" type="radio"/> Org
Description	brand x liquid foundation 30mL	<input type="radio"/> All	
<input type="radio"/> MPS/MRP Planning <input type="radio"/> Lead Times <input type="radio"/> Work In Process Order Management <input type="radio"/> Invoicing <input type="radio"/> Process Manufacturing <input type="radio"/> Service			
Customer Ordered <input checked="" type="checkbox"/> Customer Orders Enabled <input type="checkbox"/> Internal Ordered <input type="checkbox"/> Internal Orders Enabled <input type="checkbox"/> Pick Components <input type="checkbox"/> Assemble to Order <input type="checkbox"/> Ship Model Complete			
<input checked="" type="checkbox"/> Shippable <input checked="" type="checkbox"/> OE Transactable Check ATP <input checked="" type="checkbox"/> None ATP Rule <input type="radio"/> None ATP Components <input type="radio"/> None Picking Rule <input type="radio"/> None Default Shipping Organization <input type="radio"/> None Default SO Source Type <input checked="" type="radio"/> Internal Shipping SubInventory <input type="radio"/> None Charge Periodicity <input type="radio"/> None			
Tolerances Over Shipment Under Shipment Over Return Under Return			
<input checked="" type="checkbox"/> Returnable <input type="checkbox"/> RMA Inspection Required <input type="checkbox"/> Financing Allowed			

1	Customer Ordered	Indicate whether to allow an item to be ordered by external customers.
2	Customer Orders Enabled	Indicates whether an item is currently customer orderable.
3	Internal Ordered	Indicates whether to allow an item to be ordered on an internal requisition.
4	Internal Orders Enabled	Indicates whether you can currently order an item internally. If you turn this attribute on, you can specify the item on an internal requisition if the Internal Ordered Item is also on.
5	Shippable	Indicates whether to ship an item to a customer.
6	Default SO Source Type	This item attribute determines if an item is to be drop-shipped. If the value is internal, the item will not be drop-shipped. If the value is external, the item will be drop-shipped.

Organization Item (AC1)

Organization	AC1	AC_WAREHOUSES	Display Attributes
Item	foundation	<input type="radio"/> Master	<input checked="" type="radio"/> Org
Description	brand x liquid foundation 30mL	[crt]	<input type="radio"/> All

MPS/MRP Planning Lead Times Work In Process Order Management **Invoicing** Process Manufacturing Service

1 Invoiceable Item
 Invoice Enabled

2 Accounting Rule
Invoicing Rule

3 Output Tax Classification Code
Sales Account **01-520-4110-0000-000**
Payment Terms

1	Invoiceable Item	Indicates whether to include an item on an Oracle Receivables invoice.
2	Invoice Enabled	Indicates whether to activate an item for invoicing.
3	Sales Account	This attribute is controlled at the Organization level only. Enter the general ledger account that Oracle Receivables uses to record revenue when you bill the customer.

Organization Item (AC2)

Organization: AC2 AC_RETAIL
Item: foundation
Description: brand x liquid foundation 30mL

Display Attributes: Master Org All

Main Inventory Bills of Material Asset Management Costing Purchasing Receiving Physical Attributes

Receipt Date Controls

Action:
Days Early:
Days Late:

Overreceipt Quantity Control

Action:
Tolerance: %

Receipt Date Action: None – Reject – Warning

Receipt Days Early: Enter the number of days **before** the promise date you can receive an item without warning or rejection.

Receipt Days Late: Enter the number of days **after** the promise date you can receive an item without warning or rejection.

Organization Item (AC2)

Organization: AC2 AC_RETAIL
Item: foundation
Description: brand x liquid foundation 30mL

Display Attributes: Master Org All

Main Inventory Bills of Material Asset Management Costing Purchasing Receiving Physical Attributes

Receipt Date Controls

Action:
Days Early:
Days Late:

Overreceipt Quantity Control

Action:
Tolerance: %

Action:

1. Warning: System generates a warning message when over-receipt occurs.
2. Error: System prevents over-receipt and generates an error message.
3. None: No control or warning is given for over-receipt.

Tolerance:

Enter the quantity received tolerance percent, the maximum acceptable over-receipt percentage, used by the Over-Receipt Quantity Control Action attribute.

Organization Item (AC2)

Organization	AC2	AC_RETAIL	Display Attributes										
Item	foundation		<input type="radio"/> Master <input checked="" type="radio"/> Org <input type="radio"/> All										
Description	brand x liquid foundation 30mL	[ctrl]											
Main	Inventory	Bills of Material	Asset Management	Costing	Purchasing	Receiving	Physical Attributes						
1- Allow Substitute Receipts Indicate whether to allow receipt of defined substitutes in place of this item.													
2- Allow Unordered Receipts Indicate whether you can receive an item without a purchase order.													
3- Allow Express Transactions Indicate whether you can deliver all distributions for this item with one data entry transaction if the quantity to deliver equals the purchase order line balance.													
Valid Transactions <table border="1"> <tr> <td>Allow Substitute Receipts</td> <td>1</td> </tr> <tr> <td>Allow Unordered Receipts</td> <td>2</td> </tr> <tr> <td>Allow Express Transactions</td> <td>3</td> </tr> </table>								Allow Substitute Receipts	1	Allow Unordered Receipts	2	Allow Express Transactions	3
Allow Substitute Receipts	1												
Allow Unordered Receipts	2												
Allow Express Transactions	3												
Receipt Routing Enforce Ship-To Receiving SubInventory													

Organization Item (AC2)

Organization	AC2	AC_RETAIL	Display Attributes
Item	foundation		<input type="radio"/> Master <input checked="" type="radio"/> Org <input type="radio"/> All
Description	brand x liquid foundation 30mL		[crt]

Main Inventory Bills of Material Asset Management Costing Purchasing **Receiving** Physical Attributes

4- Receipt Routing

It allows you to **directly** deliver an item to its location, receive an item first, **inspect** it, then deliver, or receive an item first, then deliver without inspection (**Standard**)

5- Enforce Ship-to

It allows you to select a **non-ship-to** location enforced, or **reject** receipt of items not received to their purchase order ship-to location, or display a **warning** message if you attempt to receive an item to a location that differs from the purchase order ship-to location.

6- Receiving Sub-inventory

It allows you to set the default sub-inventory for receiving.

Valid Transactions

Allow Substitute Receipts	4
Allow Unordered Receipts	5
Allow Express Transactions	6

Receipt Routing	4
Enforce Ship-To	5
Receiving SubInventory	6

4- Assigning Items to Organizations

1. Navigate to the Master Item window.
 2. Choose Organization Assignment from the Special menu to navigate to the Organization Assignment window.
 3. The Organization field displays all organizations with this Master Organization. If you want the item enabled in specific organizations, click the **Assigned** field. The item will exist only in the Item Master and the child organizations specified here.
 4. Save your work (CTRL+S).

5- Assigning Items to Categories:

Category Assignment (ACM) - foundation

Item	foundation	brand x liquid foundation 30mL
Category Assignment		
Category Set	Control Level	Category
Product	Master	3115
Inv. Items	Org	MAKEUP.FOUNDATION
Purchasing	Org	MAKEUP.FOUNDATION

Category Set:
Defines the grouping (e.g., "Product," "Inv. Items," "Purchasing").

Control Level:
Indicates the level at which the category is controlled (e.g., "Master," "Org").

Category:
Specifies the exact category assigned.

1. Navigate to the Master Items Summary or Organization Items Summary window.
2. Select an item.
3. Choose Categories from the Tools menu.
- The item you selected appears at the top of the Category Assignment window.
4. Assign a category to the category set.
5. Save your work.

6- Move Order Transaction:

- 1- Navigate to the [Inventory responsibility > move order > move order](#)
- 2- Fill in the required fields, such as Transaction type, item details, and destination sub-inventory, then click the **On Hand** button.

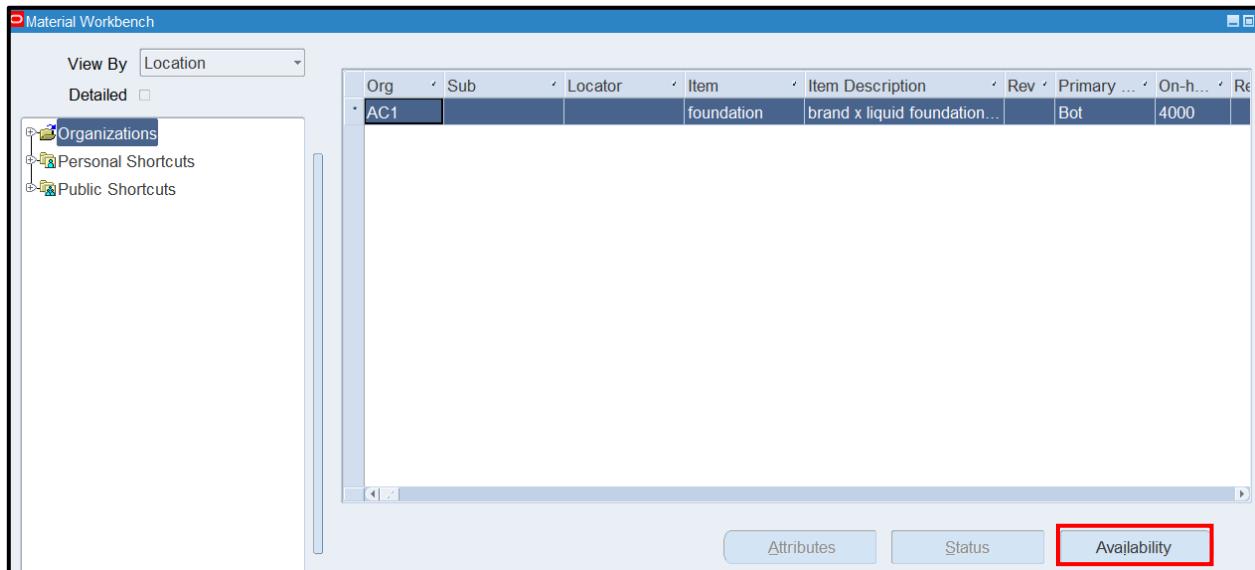
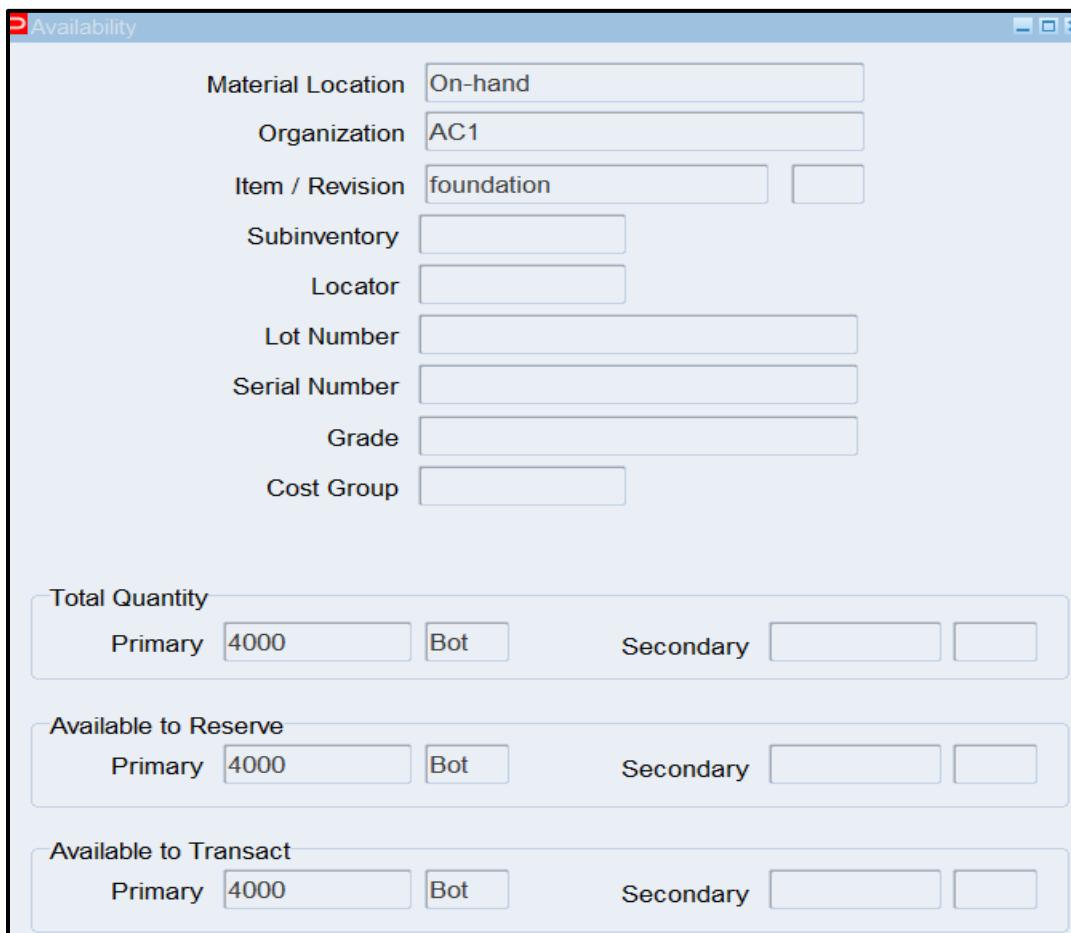
Move Orders (AC1)

Number	1	Description	stock rebalance between warehouses		
Status	Incomplete	Move Order Type	Requisition		
Default		Location			
Transaction Type	AC_Stock Rebalance	Destination Subinv			
Source Subinv		Date Required	24-04-2025 14:41:48		
Destination Account		[]			
<input type="button" value="Item"/> <input type="button" value="Project and Task"/> <input type="button" value="Source"/> <input type="button" value="Destination"/> <input type="button" value="Control"/>					
Line	Item	Transaction Type	Date Required	UOM	Primary Quantity
1	foundation	AC_Stock Rebalance	24-04-2025 14:41:48	Bot	2000
2	lipstick (limited edition)	AC_Stock Rebalance	24-04-2025 14:41:48	EAC	2000
3	hair dryer	AC_Stock Rebalance	24-04-2025 14:41:48	EAC	2000
<input type="button" value="On Hand"/> <input type="button" value="Approve"/>					
Item Description brand w hair dryer 1000watt					

Move Orders (AC1)

Number	1	Description	stock rebalance between warehouses		
Status	Incomplete	Move Order Type	Requisition		
Default		Location			
Transaction Type	AC_Stock Rebalance	Destination Subinv			
Source Subinv		Date Required	24-04-2025 14:41:48		
Destination Account		[]			
<input type="button" value="Item"/> <input type="button" value="Project and Task"/> <input type="button" value="Source"/> <input type="button" value="Destination"/> <input type="button" value="Control"/>					
Line	Item	Subinventory	Locator	Account	Location
1	foundation	S_COS			[]
2	lipstick (limited edition)	S_COS			
3	hair dryer	S_ACC			
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Close"/>					
Item Description brand w hair dryer 1000watt					
<input type="button" value="On Hand"/> <input type="button" value="Approve"/>					

3- Click the Availability button

Availability

Material Location	On-hand
Organization	AC1
Item / Revision	foundation
Subinventory	
Locator	
Lot Number	
Serial Number	
Grade	
Cost Group	

Total Quantity

Primary	4000	Bot	Secondary		
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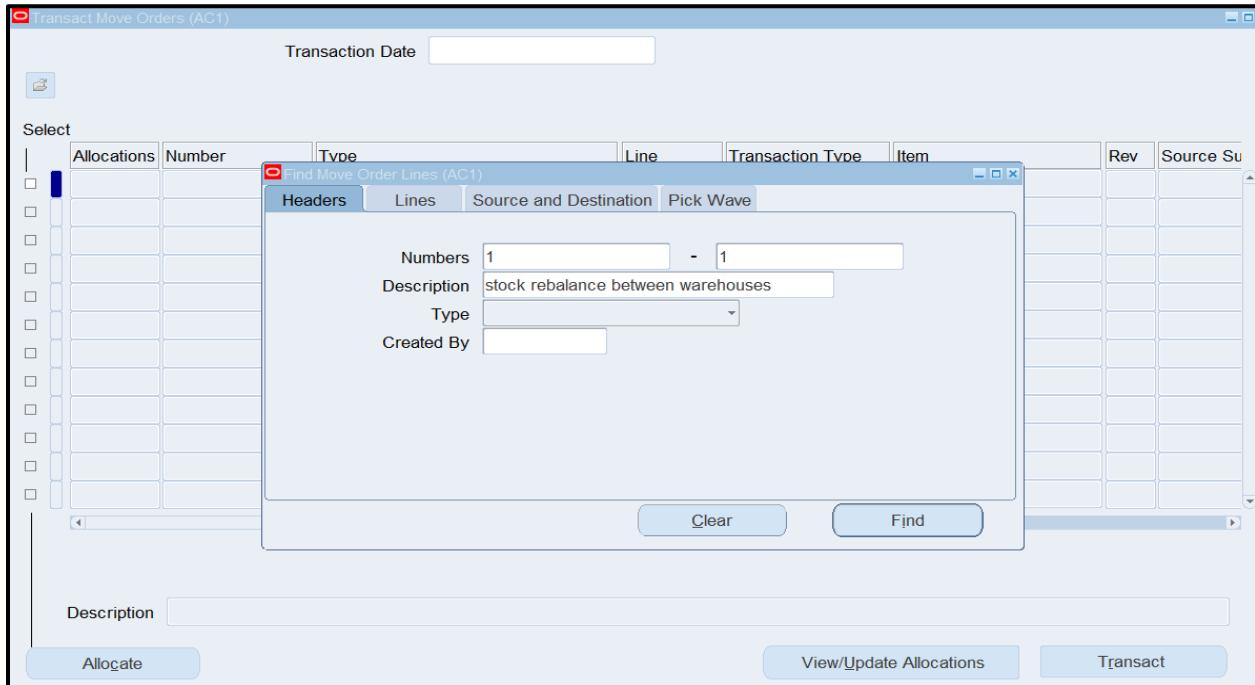
Available to Reserve

Primary	4000	Bot	Secondary		
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Available to Transact

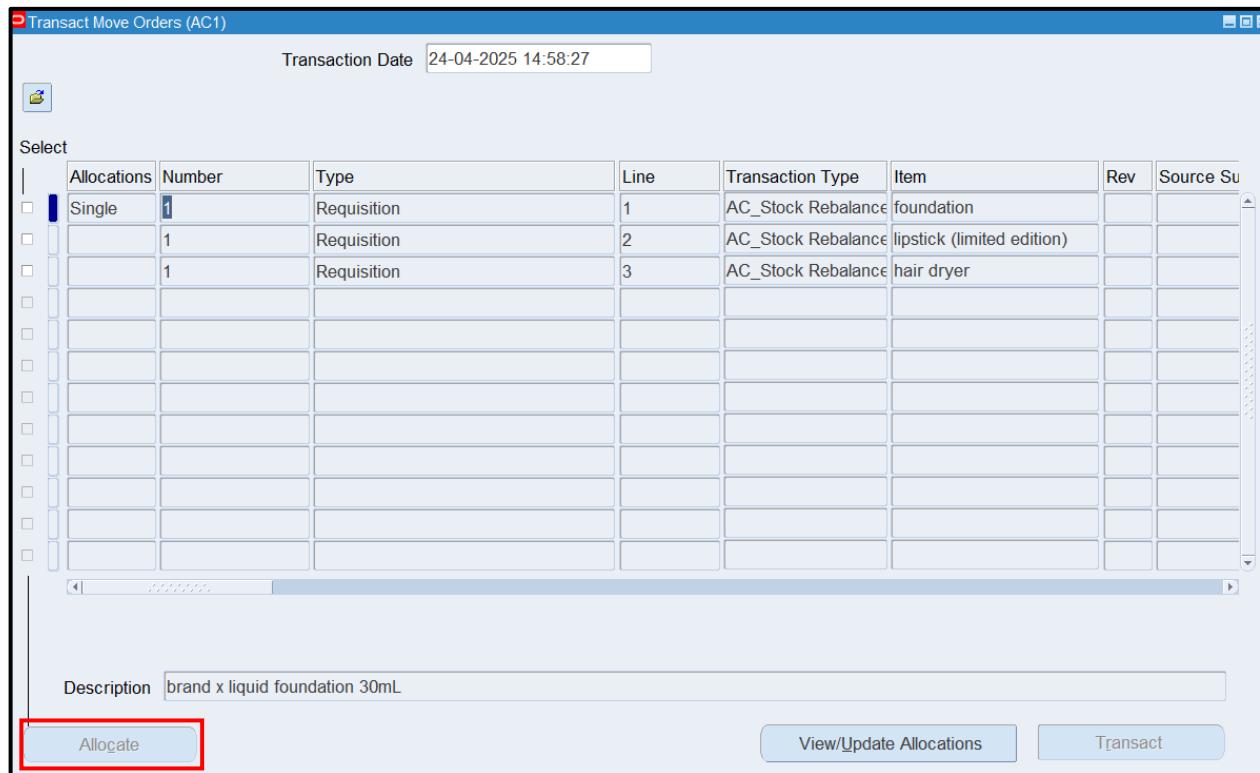
Primary	4000	Bot	Secondary		
---------	------	-----	-----------	--	--

4- Approve document Inventory Responsibility > Move Order > Transact Move Order



The screenshot shows the 'Transact Move Orders (AC1)' window. At the top, there is a 'Transaction Date' input field. Below it is a 'Select' grid with columns: Allocations, Number, Type, Line, Transaction Type, Item, Rev, and Source Su. A modal dialog titled 'Find Move Order Lines (AC1)' is open over the grid. It has tabs for Headers, Lines, Source and Destination, and Pick Wave. The 'Lines' tab is selected. It contains fields for 'Numbers' (set to 1 - 1), 'Description' (stock rebalance between warehouses), 'Type' (a dropdown menu), and 'Created By'. At the bottom of the dialog are 'Clear' and 'Find' buttons. In the main window, below the grid, there is a 'Description' input field and a row of buttons: 'Allocate', 'View/Update Allocations', and 'Transact'.

5- Select line then click the **Allocate** button to reserve quantity



The screenshot shows the 'Transact Move Orders (AC1)' window with a transaction date of 24-04-2025 14:58:27. The 'Select' grid displays three move order lines. The first line is selected, indicated by a blue highlight. The columns show: Allocations (Single), Number (1), Type (Requisition), Line (1), Transaction Type (AC_Stock Rebalance), Item (foundation), Rev, and Source Su. Below the grid is a 'Description' input field containing 'brand x liquid foundation 30mL'. At the bottom of the window are three buttons: 'Allocate' (which is highlighted with a red box), 'View/Update Allocations', and 'Transact'.



- 6- View/update allocation button, enter the source sub-inventory (mandatory).

- ## 7- Click Lot/Serial

- 8- Select lot to transact quantity from and repeat the same steps for the remaining lines and Select starting serial number for serial-controlled items.

- 9- Select all lines after allocation then click **Transact** button to finalize the transaction.



10- View move order transaction summary from [Transactions > Material Transactions > Transaction Type](#)

7- Physical Inventory Adjustments:

Inventory adjustments match system counts with actual stock, ensuring accuracy by correcting losses, damages, theft, or errors.

- 1- Navigate to **Inventory Responsibility > Counting > Physical Inventories**.
- 2- Click **New** to create a new physical inventory and specify requirements.

Counting:Physical Inventory:Physical Inventories

Physical Inventories Summary (AC1)

Physical Inventory	Date	Description	Snapshot Comp
			<input type="checkbox"/>

Counts **Approve** **New** (Red Box) **Open**

- 3- Click the **Snapshot** button

Define Physical Inventory (AC1)

Name: AC1_Warehouse Count	Description:
Date: 24-04-2025	
Approvals	
Required: Never	Count Subinventories
Tolerances + <input type="text"/> - <input type="text"/> Qty <input type="text"/> % <input type="text"/> Value <input type="text"/>	
Status	<input type="checkbox"/> Snapshot Complete <input type="checkbox"/> Adjustments Posted Snapshot Date <input type="text"/>
<input checked="" type="radio"/> All <input checked="" type="radio"/> Specific Subinventories C_COS C_ACC <input type="checkbox"/>	
<input checked="" type="checkbox"/> Allow Dynamic Tags <input checked="" type="checkbox"/> Exclude Zero Balances <input type="checkbox"/> Exclude Negative Balance <input type="checkbox"/>	
<input style="border: 2px solid red; color: red; background-color: #e0e0e0; padding: 5px; margin-right: 10px;" type="button" value="Snapshot"/> <input type="button" value="Tags"/>	

- 4- Note that the **Status** box now has **Snapshot Complete** checked with the **Snapshot Date**.
- 5- To generate Tags: click on the **Tags** button.

Define Physical Inventory (AC1)

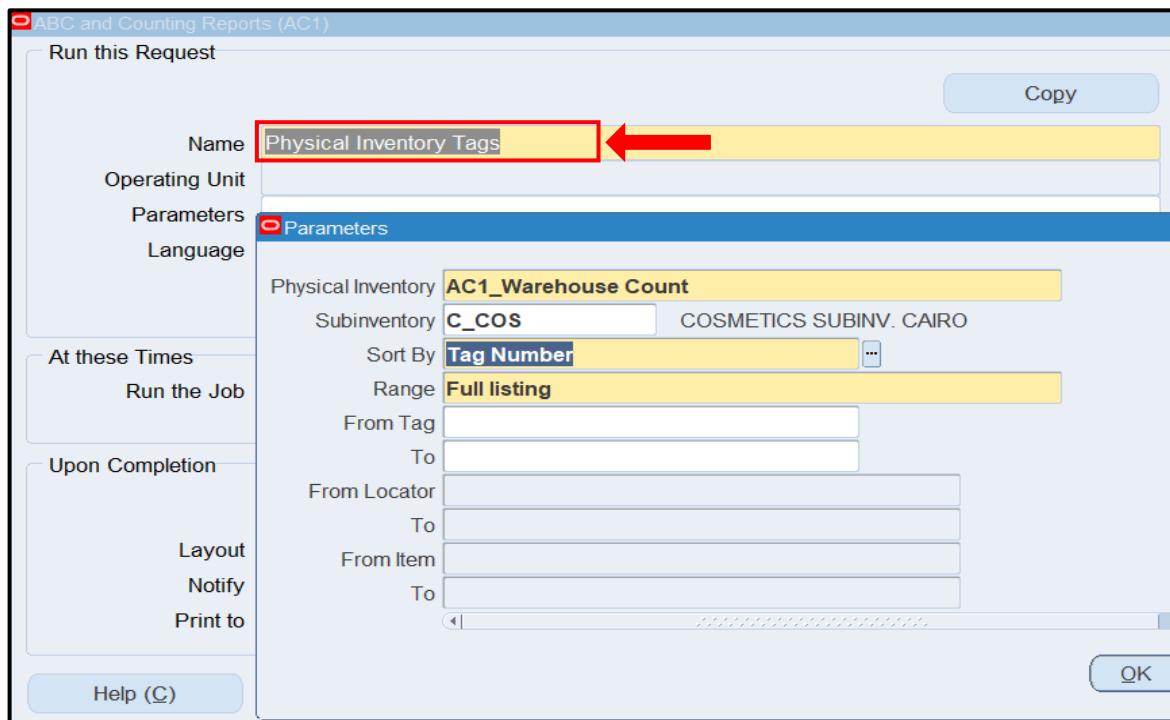
Name: AC1_Warehouse Count	Description:
Date: 24-04-2025	
Approvals	
Required: Never	
Tolerances	
Qty: +	-
Value:	%
Status	
<input checked="" type="checkbox"/> Snapshot Complete ← <input type="checkbox"/> Adjustments Posted Snapshot Date: 24-04-2025 ←	
<input checked="" type="radio"/> All <input checked="" type="radio"/> Specific Subinventories C_ACC C_COS ... <input checked="" type="checkbox"/> Allow Dynamic Tags <input checked="" type="checkbox"/> Exclude Zero Balances <input type="checkbox"/> Exclude Negative Balance [] ←	
Snapshot Tags	

- 6- Check Show Serial on Tags (all serial-controlled items must have a Serial on the tag), then press **Generate**.

Generate Physical Inventory Tags (AC1)

Name: AC1_Warehouse Count	Description:
Snapshot Date: 24-04-2025	
Tag Type: <input type="radio"/> Blank <input checked="" type="radio"/> Default	
<input checked="" type="checkbox"/> Show Serial on Tags	
Tags	
Starting Tag: 0000000	
Digit Increments: 1111111	
Ending Tag: 0002001	
Number of Tags: 2002	
→ Generate	

- 7- Open Reports > ABC and Counting to print the generated tags.
- 8- We will run two reports:
 - Physical inventory tags (worker records item counts)
 - Physical inventory tag listing (worker sticks it on items)
- 9- View request output to open the counting document.



AC1_AC_WAREHOUSES Tag: 0001999		AC1_Warehouse Count Printed: 24-APR-2025	
Item:	foundation	Counted By:	_____
Description:	brand x liquid foundation 30mL	Count Date:	_____
Primary UOM:	Btl	Count UOM:	_____
Revision:	3	Count Qty:	_____
Subinventory:	C_COS		
Locator:			
Lot Num:	LFND-0001		
Serial Num:			
AC1_AC_WAREHOUSES Tag: 0002000		AC1_Warehouse Count Printed: 24-APR-2025	
Item:	lipstick (limited edition)	Counted By:	_____
Description:	brand z limited edition lipstick	Count Date:	_____
Primary UOM:	EAC	Count UOM:	_____
Revision:		Count Qty:	_____
Subinventory:	C_COS		
Locator:			
Lot Num:			
Serial Num:			
AC1_AC_WAREHOUSES Tag: 0002001		AC1_Warehouse Count Printed: 24-APR-2025	
Item:	Eva whietenting night cream	Counted By:	_____
Description:	Eva whietenting night cream	Count Date:	_____
		Count UOM:	_____
		Count Qty:	_____

ABC and Counting Reports (AC1)

Run this Request

Name: Physical inventory tag listing

Operating Unit:

Parameters:

Language: American English

Parameters

At these Times: Run the Job

Physical Inventory: AC1_Warehouse Count

Upon Completion: Save all Output Files Burst Output

Layout:

Notify:

Print to: noprint

OK

Help (C) Submit Cancel

AC_WAREHOUSES						Report Date: 24-APR-2025 18:09
Physical Inventory Name: AC1_Warehouse Count			Physical Inventory Tag Listing			Page: 1
Tag Number	Item	Rev Lot Number	Serial Number	Subinv	Locator	Quantity UOM Counted By
0000000	hair dryer		HD-2504-1000001	C_ACC	A.3	
0000001	hair dryer		HD-2504-1000002	C_ACC	A.3	
0000002	hair dryer		HD-2504-1000003	C_ACC	A.3	
0000003	hair dryer		HD-2504-1000004	C_ACC	A.3	
0000004	hair dryer		HD-2504-1000005	C_ACC	A.3	
0000005	hair dryer		HD-2504-1000006	C_ACC	A.3	
0000006	hair dryer		HD-2504-1000007	C_ACC	A.3	
0000007	hair dryer		HD-2504-1000008	C_ACC	A.3	
0000008	hair dryer		HD-2504-1000009	C_ACC	A.3	
0000009	hair dryer		HD-2504-1000010	C_ACC	A.3	
0000010	hair dryer		HD-2504-1000011	C_ACC	A.3	
0000011	hair dryer		HD-2504-1000012	C_ACC	A.3	
0000012	hair dryer		HD-2504-1000013	C_ACC	A.3	
0000013	hair dryer		HD-2504-1000014	C_ACC	A.3	

- 10- Enter the quantity from the tag count for each item. you can **Void** or **Void All** the count of a specific item from [Counting > Tag Count](#)
- The new tag check is used for dynamic tags

Physical Inventory Tag Counts (AC1)

Name	AC1_Warehouse Count	Find																																																															
Snapshot Date	24-04-2025																																																																
Default Counter	DOAA MEDHAT,																																																																
Main	Detail																																																																
<table border="1"> <thead> <tr> <th colspan="7">New Tag</th> </tr> <tr> <th>Tag</th> <th>Item</th> <th>Rev</th> <th>Subinventory</th> <th>Locator</th> <th>UOM</th> <th>Qty</th> </tr> </thead> <tbody> <tr><td>0000000</td><td>hair dryer</td><td></td><td>C_ACC</td><td>A.3</td><td>EAC</td><td></td></tr> <tr><td>0000001</td><td>hair dryer</td><td></td><td>C_ACC</td><td>A.3</td><td>EAC</td><td></td></tr> <tr><td>0000002</td><td>hair dryer</td><td></td><td>C_ACC</td><td>A.3</td><td>EAC</td><td></td></tr> <tr><td>0000003</td><td>hair dryer</td><td></td><td>C_ACC</td><td>A.3</td><td>EAC</td><td></td></tr> <tr><td>0000004</td><td>hair dryer</td><td></td><td>C_ACC</td><td>A.3</td><td>EAC</td><td></td></tr> <tr><td>0000005</td><td>hair dryer</td><td></td><td>C_ACC</td><td>A.3</td><td>EAC</td><td></td></tr> <tr><td>0000006</td><td>hair dryer</td><td></td><td>C_ACC</td><td>A.3</td><td>EAC</td><td></td></tr> </tbody> </table>			New Tag							Tag	Item	Rev	Subinventory	Locator	UOM	Qty	0000000	hair dryer		C_ACC	A.3	EAC		0000001	hair dryer		C_ACC	A.3	EAC		0000002	hair dryer		C_ACC	A.3	EAC		0000003	hair dryer		C_ACC	A.3	EAC		0000004	hair dryer		C_ACC	A.3	EAC		0000005	hair dryer		C_ACC	A.3	EAC		0000006	hair dryer		C_ACC	A.3	EAC	
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0000003	hair dryer		C_ACC	A.3	EAC																																																												
0000004	hair dryer		C_ACC	A.3	EAC																																																												
0000005	hair dryer		C_ACC	A.3	EAC																																																												
0000006	hair dryer		C_ACC	A.3	EAC																																																												
Item Description: brand w hair dryer 1000watt <input type="button" value="Void All"/> <input type="button" value="Unvoid All"/>																																																																	

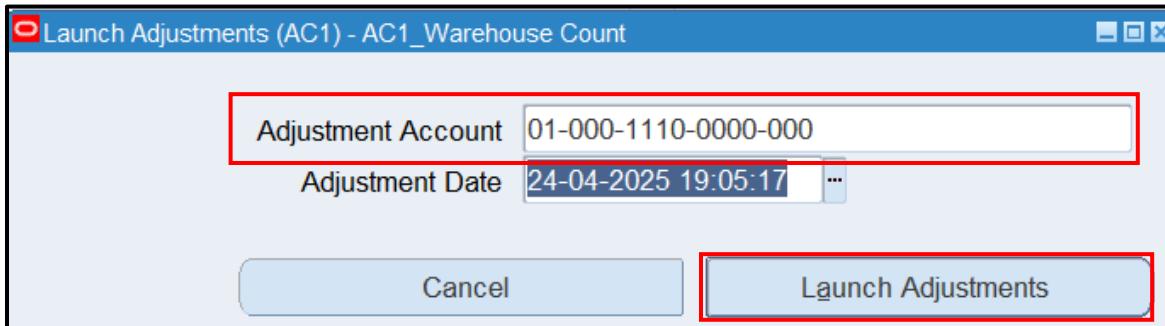
- 15-Approve the count from [Counting > Approve Adjustment](#)

Approve Physical Adjustments Summary (AC1)

Name	AC1_Warehouse Count	Find																																																												
Freeze Date	24-04-2025																																																													
<input type="checkbox"/> Adjustments Posted																																																														
Adjustments Default Approver: DOAA MEDHAT,																																																														
<table border="1"> <thead> <tr> <th>None</th> <th>Approve</th> <th>Reject</th> <th>Item</th> <th>Snapshot Qty</th> <th>Snapshot UOM</th> <th>Secondary Qty 2</th> <th>Secondary UOM</th> <th>Qty</th> <th>\$</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td>foundation</td> <td>2000</td> <td>Bot</td> <td></td> <td></td> <td>-2000</td> <td></td> </tr> <tr> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td>hair dryer</td> <td>1</td> <td>EAC</td> <td></td> <td></td> <td>0</td> <td></td> </tr> <tr> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td>hair dryer</td> <td>1</td> <td>EAC</td> <td></td> <td></td> <td>0</td> <td></td> </tr> <tr> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td>hair dryer</td> <td>1</td> <td>EAC</td> <td></td> <td></td> <td>-1</td> <td></td> </tr> <tr> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td>hair dryer</td> <td>1</td> <td>EAC</td> <td></td> <td></td> <td>-1</td> <td></td> </tr> </tbody> </table>			None	Approve	Reject	Item	Snapshot Qty	Snapshot UOM	Secondary Qty 2	Secondary UOM	Qty	\$	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	foundation	2000	Bot			-2000		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	hair dryer	1	EAC			0		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	hair dryer	1	EAC			0		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	hair dryer	1	EAC			-1		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	hair dryer	1	EAC			-1	
None	Approve	Reject	Item	Snapshot Qty	Snapshot UOM	Secondary Qty 2	Secondary UOM	Qty	\$																																																					
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	foundation	2000	Bot			-2000																																																						
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	hair dryer	1	EAC			0																																																						
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	hair dryer	1	EAC			0																																																						
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	hair dryer	1	EAC			-1																																																						
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	hair dryer	1	EAC			-1																																																						
Description: brand x liquid foundation 30mL <input type="button" value="Approve All"/> <input type="button" value="Reject All"/> <input type="button" value="Tags"/> <input type="button" value="Open"/>																																																														

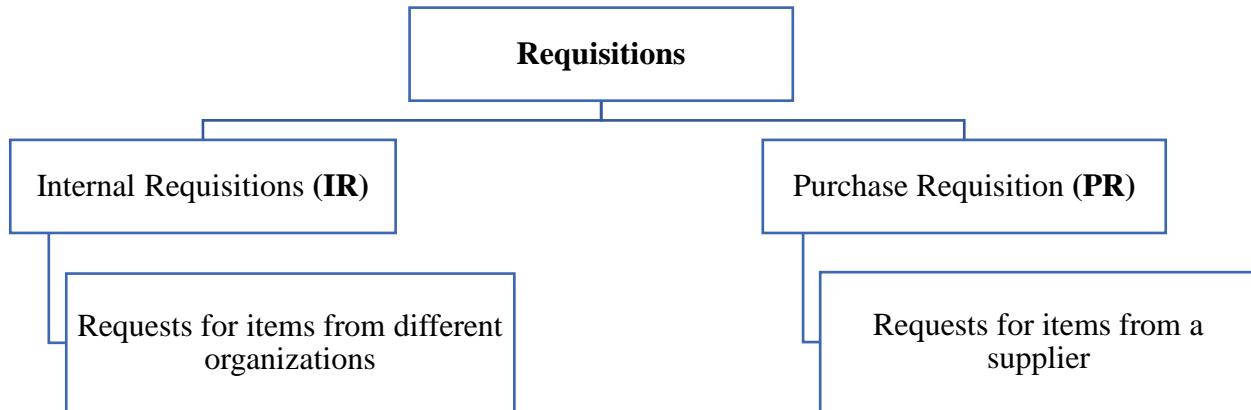
16- After approval, Counting > Physical Inventory > Tools > Launch Adjustment

17- Specify the **Adjustment Account**, then **Launch Adjustments** button, physical inventory adjustment request is submitted. Adjustments posted will be checked in the physical inventory status box.



8- Purchasing Transactions:

1. Purchase Requisition Transactions



- Purchase Requisitions (PR)

A Purchase Requisition is a formal request intended to procure/buy something that is needed by the organization from external suppliers.

- 1- Navigate to [Purchasing Responsibility \(AC_Purchasing\) > Requisitions > Requisitions](#)

The screenshot shows the SAP interface for creating a new purchase requisition. The top section displays general details:

Operating Unit	Alpha Co. OU
Number	6
Type	Purchase Requ
Description	
Status	Incomplete
Total	USD 4,360,200.00

The "Lines" tab is selected, showing a table of requisition lines:

Num	Type	Item	Rev	Category	Description	UOM
1	Goods	foundation		MAKEUP.FOUNDR	brand x liquid foundation	bottle
2	Goods	lipstick (limited edition)		MAKEUP.LIPSTIC	brand z limited edition li	each
3	Expense			EXPENSES.CLE	cleaning supplies	Dollar
4	Goods	hair dryer		HAIR STYLING T	brand w hair dryer 1000	each

Below the table, there are two groups of fields:

- Destination Type:** Expense
- Requester:** MOHAMED MEDHAT,
- Organization:** AC_WAREHOUSES
- Location:** AC_CAIRO
- Subinventory:** (empty)
- Source:** Supplier
- Supplier:** (empty)
- Site:** (empty)
- Contact:** (empty)
- Phone:** (empty)

At the bottom are buttons for "Outside Services", "Catalog...", "Distributions", and "Approve...".

2. Enter Requisition Details

- Specify the Item, quantity, and Need-by date for the goods required.

3. Specify the line information, such as source and destination information.

Requisition Summary to Requisitions - [New]

Operating Unit	Alpha Co. OU	Type	Purchase Requi	Preparer	MOHAMED MEDHAT,
Number	6	Status	Incomplete	Total	USD 4,360,200.00
Description					

Lines Source Details Details Currency

Num	Quantity	Price	Need-By	Amount	Charge Account
1	4000	50	21-04-2025 00:00:00	200,000.00	01-000-1410-0000-000
2	4000	40	21-04-2025 00:00:00	160,000.00	01-000-1410-0000-000
3	200	1	21-04-2025 00:00:00	200.00	
4	4000	1000	21-04-2025 00:00:00	4,000,000.00	01-000-1410-0000-000

Destination Type: Expense Source: Supplier

Requester: MOHAMED MEDHAT, Supplier:

Organization: AC_WAREHOUSES Site:

Location: AC_CAIRO Contact:

Subinventory: Phone:

Outside Services Catalog... **Distributions** Approve...

4. Add Distribution Information

- Click the Distributions button to allocate costs to the appropriate accounts.

Distributions - [New]

Accounts	Project				
Num	Quantity	Charge Account	Recovery Rate	GL Date	Budget Account
1	4000	01-000-1410-0000-000			
Account Description					
Charge	Operations-No Department-Inventory Ma		Budget		
Accrual	Operations-No Department-Accounts Pa		Variance	Operations-M1, Seattle Manufact-Invoice	

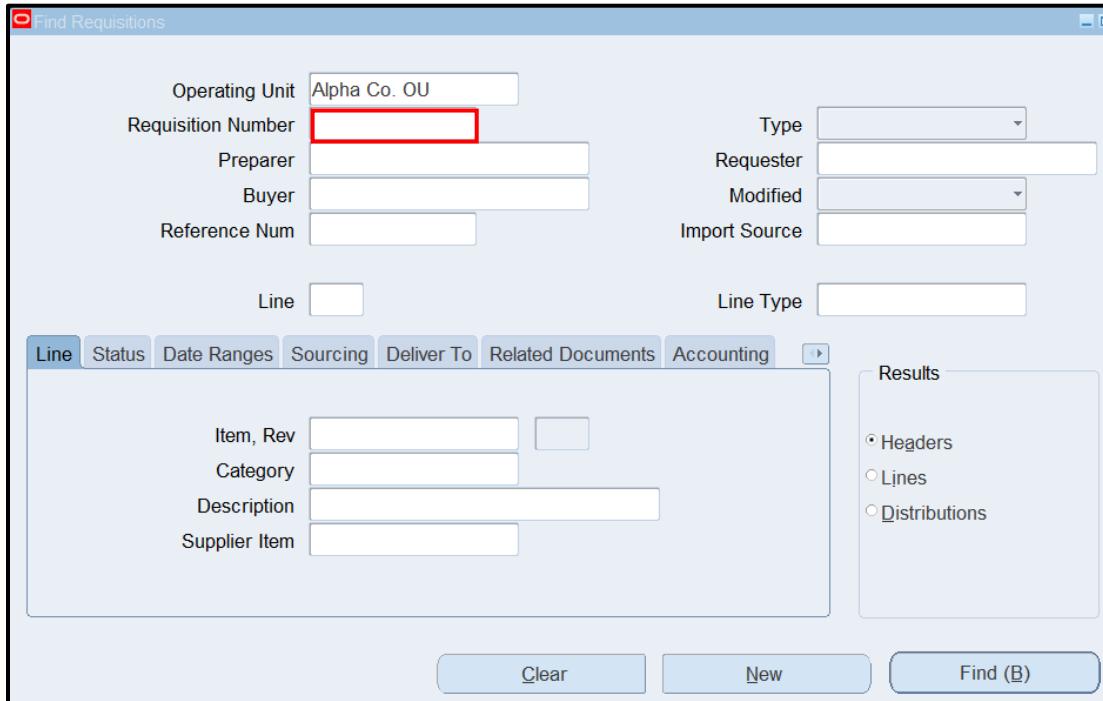
5. Submit for Approval

- Click the Approve button to send the requisition for approval.
- Approval hierarchies route the requisition to the appropriate person for review.

Approve Document - 5

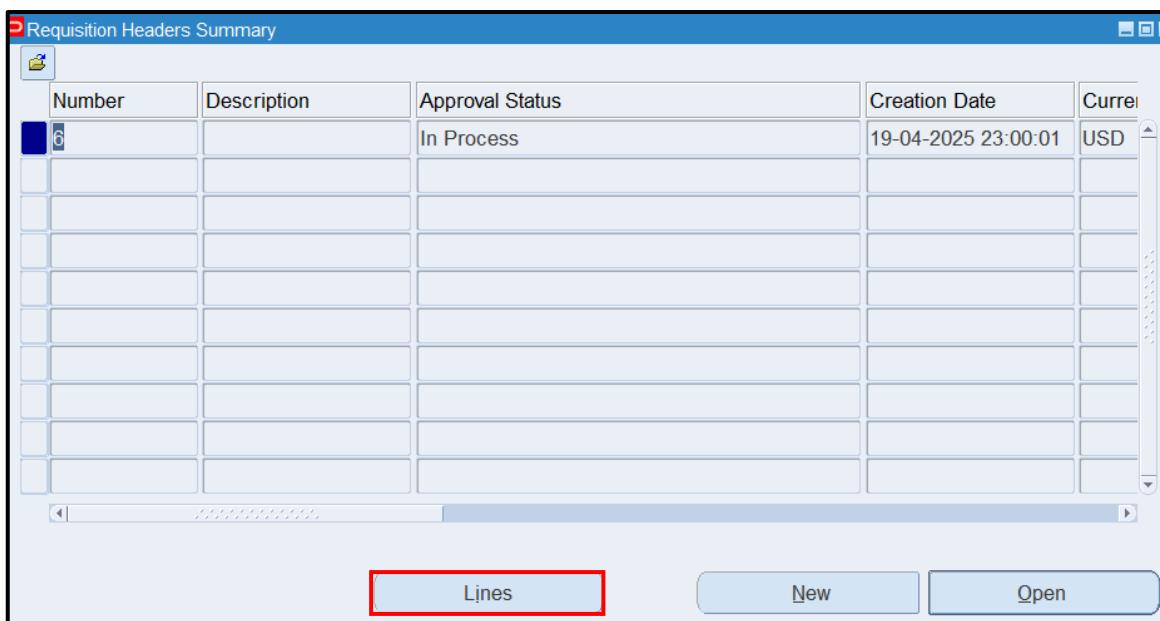
Approval Details		Additional Options
Encumbrance <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <input type="checkbox"/> Reserve <input type="checkbox"/> Unreserve <input type="checkbox"/> Use GL Override <input type="checkbox"/> Use Document GL Date to Unreserve </div> <div style="flex: 1;"> Unreserve Date <input type="text"/> Accounting Date <input type="text"/> </div> </div>		
Approval <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <input checked="" type="checkbox"/> Submit for Approval <input checked="" type="checkbox"/> Forward </div> <div style="flex: 1;"> Forward From <input type="text"/> MOHAMED MEDHAT, Approval Path <input type="text"/> AC_PR_APPROVAL Forward To <input type="text"/> HANIN MEDHAT, <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"> <input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="button" value="Up"/> <input type="button" value="Down"/> </div> </div> </div>		
Transmission Methods <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <input type="checkbox"/> Print <input type="checkbox"/> Fax <input type="checkbox"/> E-Mail </div> <div style="flex: 1;"> FAX Number <input type="text"/> E-Mail Address <input type="text"/> </div> <div style="flex: 1;"> <input type="radio"/> XML <input type="radio"/> EDI </div> </div>		
<input style="border: 2px solid red; padding: 5px; margin-right: 10px;" type="button" value="OK"/> <input type="button" value="Cancel"/>		

6. Check Requisition Status from **Purchasing Responsibility (AC_Purchasing) > Requisitions > Requisitions Summary** to track the status of your requisition.



The screenshot shows the 'Find Requisitions' dialog box. It includes fields for Operating Unit (Alpha Co. OU), Requisition Number (highlighted with a red box), Preparer, Buyer, Reference Num, Type, Requester, Modified, Import Source, Line, Line Type, and various search filters like Line, Status, Date Ranges, Sourcing, Deliver To, Related Documents, Accounting, and Accounting. On the right, there's a 'Results' section with radio buttons for Headers, Lines (selected), and Distributions. At the bottom are buttons for Clear, New, and Find (B).

7- Press the Lines button



The screenshot shows the 'Requisition Headers Summary' grid. It displays a single row of data with columns for Number (6), Description, Approval Status (In Process), Creation Date (19-04-2025 23:00:01), and Currency (USD). At the bottom of the grid, there are buttons for Lines (highlighted with a red box), New, and Open.



8- Press the Distribution button



9- View [Tools > View action history](#) to see submission and approval details.

10- In this step, Hanin will receive an alert of a PR that requires approval.

Home

Navigator

Personalize

- ▶ **AC_INVENTORY**
- ▶ **AC_ORDER MANAGEMENT**
- ▶ **AC_PURCHASING**

Worklist

From	Type	Subject	Sent	Due
MOHAMED MEDHAT	PO Requisition Approval	Purchase Requisition 6 for MOHAMED MEDHAT (4,360,200.00 USD)	19-04-2025	
DOAA MEDHAT	PO Requisition Approval	Purchase Requisition 1 has been approved	19-04-2025	

TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.

11- In this step, Hanin can click **Approve**

Purchase Requisition 6 for MOHAMED MEDHAT (4,360,200.00 USD)

				Total	4,360,200.00 USD				
From	MOHAMED MEDHAT	To	HANIN MEDHAT	Tax (Non Recoverable)	0.00 USD	Attachments			
Sent	19-04-2025 23:02:29	ID	8351957						
Requisition Lines									
...	Line	Description	Supplier	Cost Center	Unit	Quantity	Price	Price (USD)	Amount (USD) Charge Account
1		brand x liquid foundation 30ml.		000	bottle	4000	50		200,000.00 01-000-1410-0000-000
2		brand z limited edition lipstick		000	each	4000	40		160,000.00 01-000-1410-0000-000
3		cleaning supplies		000	each	4000			200.00 01-000-1410-0000-000
4		brand w hair dryer 1000watt		000	each	4000	1000		4,000,000.00 01-000-1410-0000-000

Approval Sequence



...

Num	Name	Action	Action Date	Note
3	DOAA MEDHAT,	Pending		
2	HANIN MEDHAT,			
1	MOHAMED MEDHAT,	Submitted	19-04-2025 23:02:29	

Related Applications

- Edit Requisition
- View Requisition Details
- Open Document

12- Navigate to Requisition Summary from **Purchasing Responsibility (AC_Purchasing) > Requisitions > Requisitions Summary**

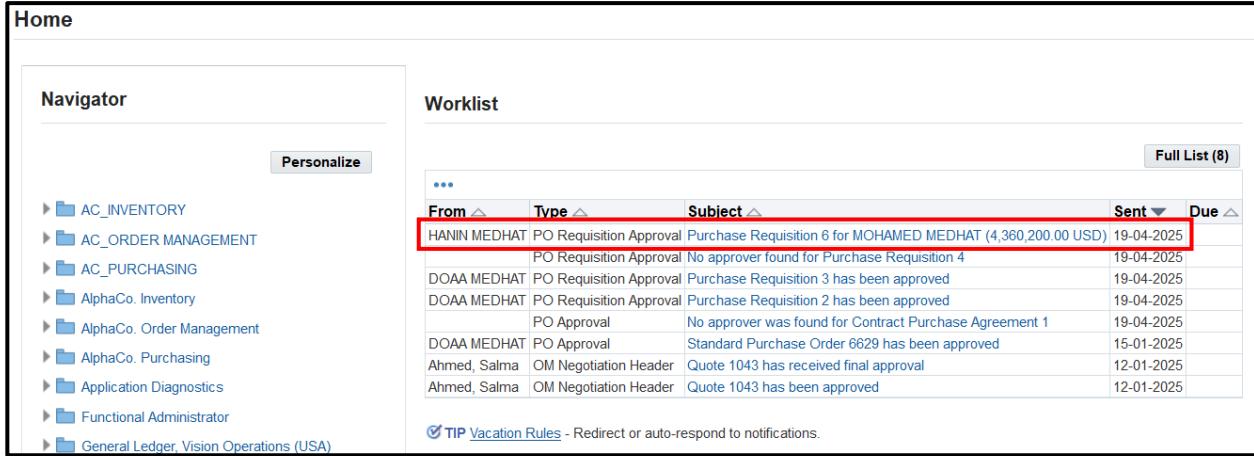
Find Requisitions

Operating Unit	Alpha Co. OU	Type	
Requisition Number	6	Requester	
Preparer		Modified	
Buyer		Import Source	
Reference Num		Line Type	
Line			
<input type="button" value="Line"/> <input type="button" value="Status"/> <input type="button" value="Date Ranges"/> <input type="button" value="Sourcing"/> <input type="button" value="Deliver To"/> <input type="button" value="Related Documents"/> <input type="button" value="Accounting"/> <input type="button" value="New"/>			
Item, Rev <input type="text"/> Category <input type="text"/> Description <input type="text"/> Supplier Item <input type="text"/>			
<input type="radio"/> Headers <input type="radio"/> Lines <input type="radio"/> Distributions			
<input type="button" value="Clear"/> <input type="button" value="New"/> <input type="button" value="Find (B)"/>			



NEXT
CAREER DEVELOPMENT ACADEMY

13- The PO Requisition that requires approval now is sent to user Doaa in the Approval Hierarchy.



Home

Navigator

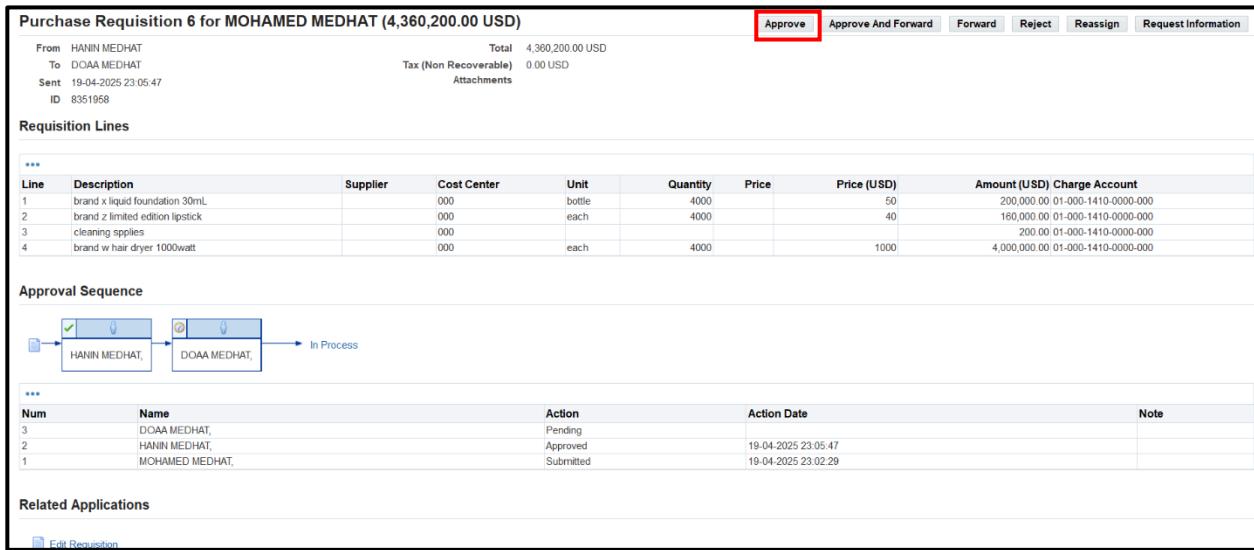
- AC_INVENTORY
- AC_ORDER MANAGEMENT
- AC_PURCHASING
- AlphaCo. Inventory
- AlphaCo. Order Management
- AlphaCo. Purchasing
- Application Diagnostics
- Functional Administrator
- General Ledger, Vision Operations (USA)

Worklist

From	Type	Subject	Sent	Due
HANIN MEDHAT	PO Requisition Approval	Purchase Requisition 6 for MOHAMED MEDHAT (4,360,200.00 USD)	19-04-2025	
DOAA MEDHAT	PO Requisition Approval	No approver found for Purchase Requisition 4	19-04-2025	
DOAA MEDHAT	PO Requisition Approval	Purchase Requisition 3 has been approved	19-04-2025	
	PO Approval	Purchase Requisition 2 has been approved	19-04-2025	
	PO Approval	No approver was found for Contract Purchase Agreement 1	19-04-2025	
DOAA MEDHAT	PO Approval	Standard Purchase Order 6629 has been approved	15-01-2025	
Ahmed, Salma	OM Negotiation Header	Quote 1043 has received final approval	12-01-2025	
Ahmed, Salma	OM Negotiation Header	Quote 1043 has been approved	12-01-2025	

TIP Vacation Rules - Redirect or auto-respond to notifications.

14- In this step, Doaa can click Approve



Purchase Requisition 6 for MOHAMED MEDHAT (4,360,200.00 USD)

From: HANIN MEDHAT	Total: 4,360,200.00 USD
To: DOAA MEDHAT	Tax (Non Recoverable): 0.00 USD
Sent: 19-04-2025 23:05:47	Attachments:
ID: 8351958	

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price	Price (USD)	Amount (USD)	Charge Account
1	brand x liquid foundation 30mL	000	bottle	4000		50		200,000.00	01-000-1410-0000-000
2	brand z limited edition lipstick	000	each	4000		40		160,000.00	01-000-1410-0000-000
3	cleaning supplies	000						200.00	01-000-1410-0000-000
4	brand w hair dryer 1000watt	000	each	4000		1000		4,000,000.00	01-000-1410-0000-000

Approval Sequence



Num	Name	Action	Action Date	Note
3	DOAA MEDHAT,	Pending		
2	HANIN MEDHAT,	Approved	19-04-2025 23:05:47	
1	MOHAMED MEDHAT,	Submitted	19-04-2025 23:02:29	

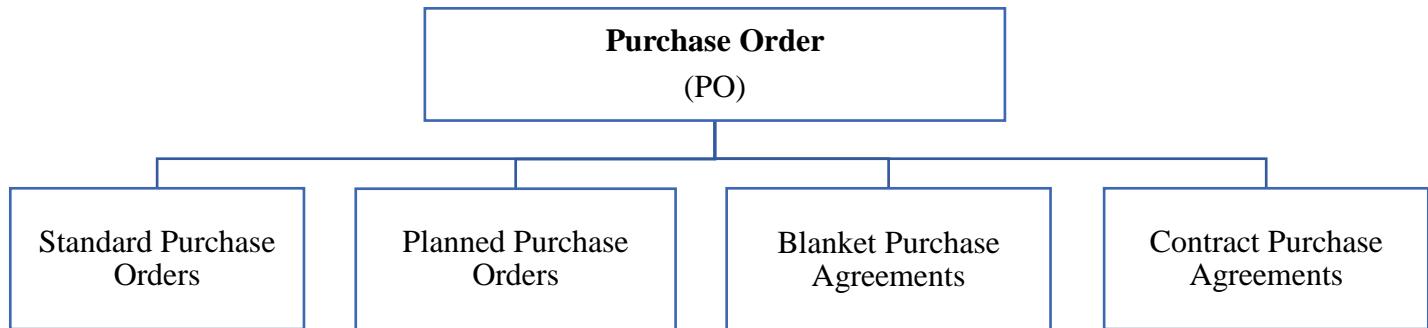
Related Applications

Edit Requisition



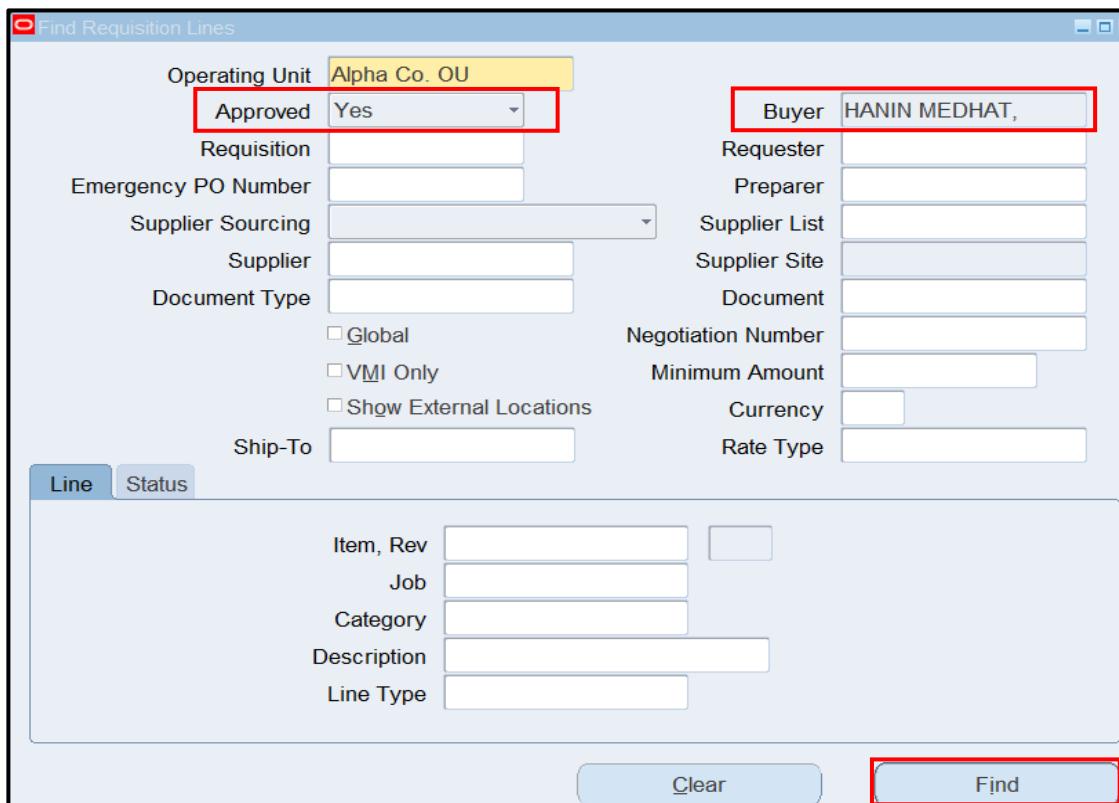
15- From Requisition Summary from Purchasing Responsibility (AC_Purchasing) > Requisitions > Requisitions Summary

9- Purchase Order Transactions (PO)



- Standard Purchase Order – Creating a PO from a PR

- 1- Navigate to the **Purchasing Responsibility (AC_Purchasing) > AutoCreate**
- 2- Find Requisition with Buyer: HANIN MEDHAT, and Approved (Yes) status.



The screenshot shows the 'Find Requisition Lines' search screen. Key fields highlighted with red boxes include:

- Operating Unit:** Alpha Co. OU
- Approved:** Yes
- Buyer:** HANIN MEDHAT,
- Find:** (The 'Find' button at the bottom right is also highlighted with a red box.)

Other visible fields include:

- Requisition, Emergency PO Number, Supplier Sourcing, Supplier, Document Type, Ship-To.
- Checkboxes: Global, VMI Only, Show External Locations.
- Text fields: Requester, Preparer, Supplier List, Supplier Site, Document, Negotiation Number, Minimum Amount, Currency, Rate Type.
- Buttons: Line, Status.
- Input fields: Item, Rev, Job, Category, Description, Line Type.
- Buttons: Clear, Find.

- 3- Select Requisition Lines and choose the requisition lines you want to convert into a purchase order and press **Automatic**.

- 4- Click the **Create** button

New Document

Global Agreement	<input type="text"/>	Purchasing Org	Alpha Co. OU
Document	<input type="text"/>	RFQ Type	<input type="text"/>
Release	<input type="text"/>	Release Date	<input type="text"/>
Supplier	<input type="text"/>	Supplier Site	<input type="text"/>
		Supplier List Name	<input type="text"/>
Currency			
Source	Default		
Requisition	<input type="text"/>	Line	<input type="text"/>
Currency	USD	Rate Type	<input type="text"/>
Rate Date	19-04-2025	Rate	<input type="text"/>

Create **Cancel**



5- Click the **Shipments** button

6- Click the **Receiving Controls** button and display the **Receiving Controls** options

The screenshot shows the SAP Business One interface. On the left, the 'Shipments' screen displays a list of items for shipment. The first two items are highlighted in yellow, indicating they are selected. The columns include Num, Org, Ship-To, UOM, Quantity, Promised Date, Need-By, and Promise. The second item has a quantity of 2000 and a promised date of 21-04-2025 00:00. At the bottom of this screen, there are filters for Line Num (1), Item (foundation), and Description (brand x liquid foundation 30mL). Below the list are buttons for 'Receiving Controls' (highlighted with a red box) and 'Distributions'. A large red arrow points from the 'Receiving Controls' button on the left to the 'Receiving Controls' dialog box on the right.

Shipments - 3

Shipments More Status

Num	Org	Ship-To	UOM	Quantity	Promised Date	Need-By	Promise	[]
1	AC1	AC_CAIRO	bottle	2000		21-04-2025 00:00:		
2	AC1	AC_CANAL	bottle	2000		21-04-2025 00:00:		

Line Num 1 Item foundation brand x liquid foundation 30mL

Receiving Controls Distributions

Receiving Controls

Receipt Date

Days Early 3

Days Late 3

Action Warning

Last Accept Date

Over Receipt Tolerance

Tolerance 0 %

Action None

Miscellaneous

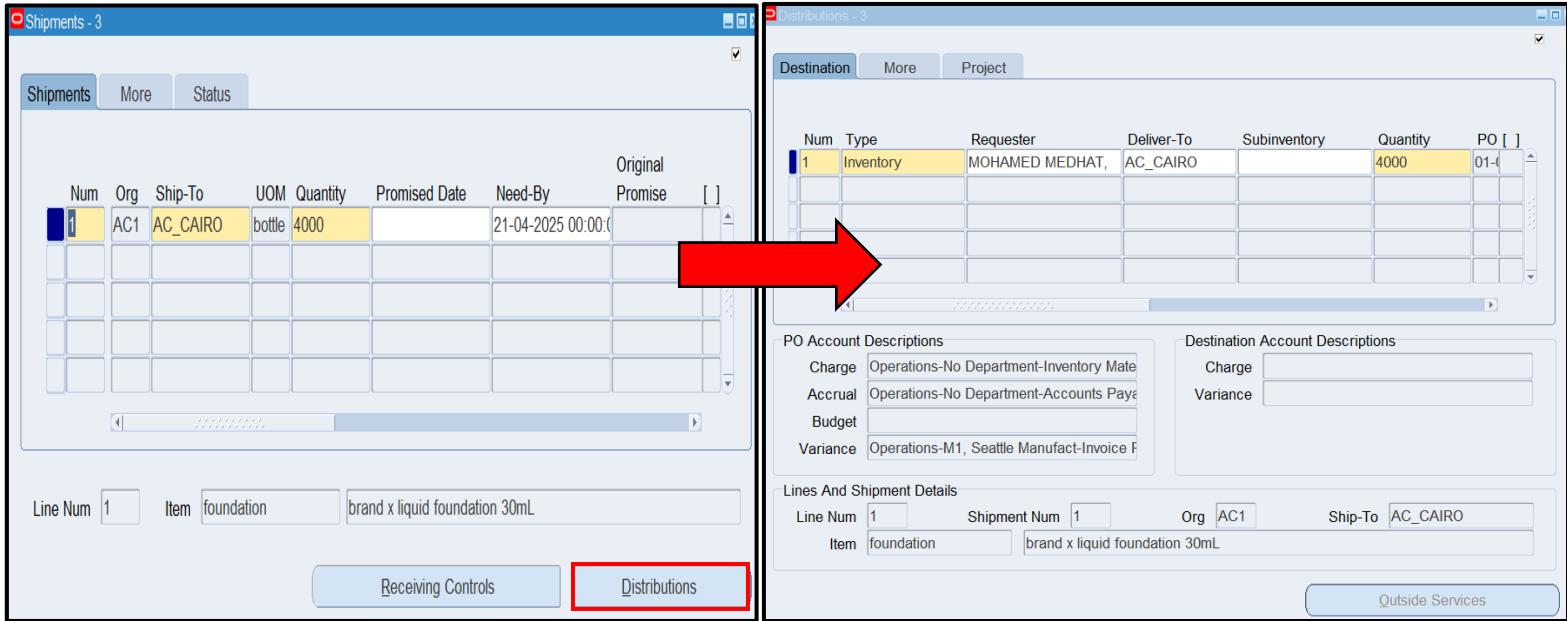
Allow Substitute Receipts

Receipt Routing Standard Receipt

Enforce Ship To None

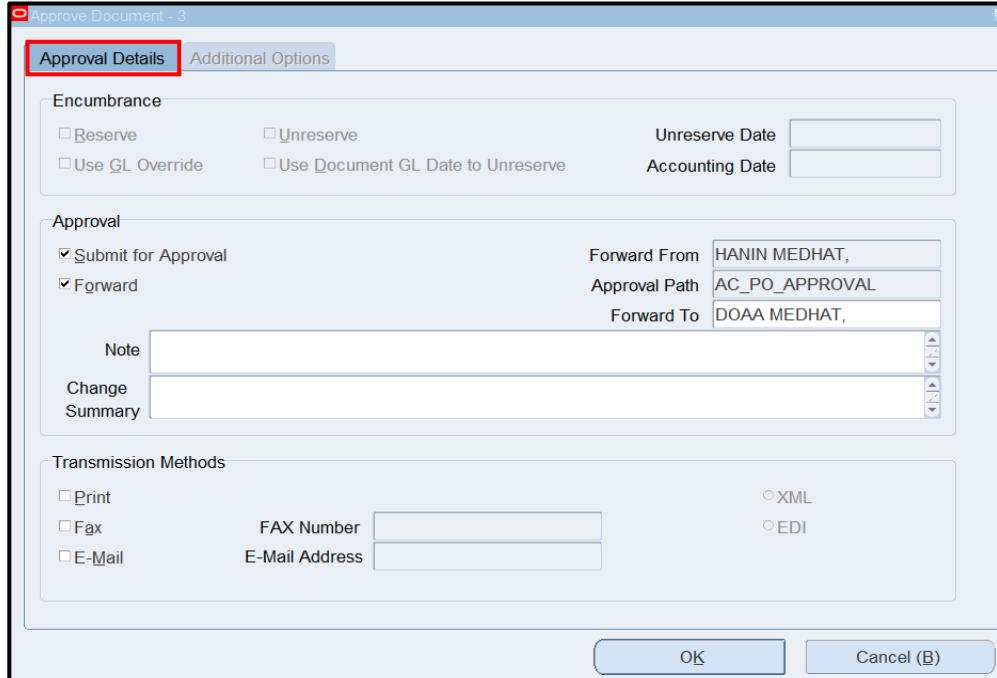
OK Cancel

7- Click the **Distributions** button



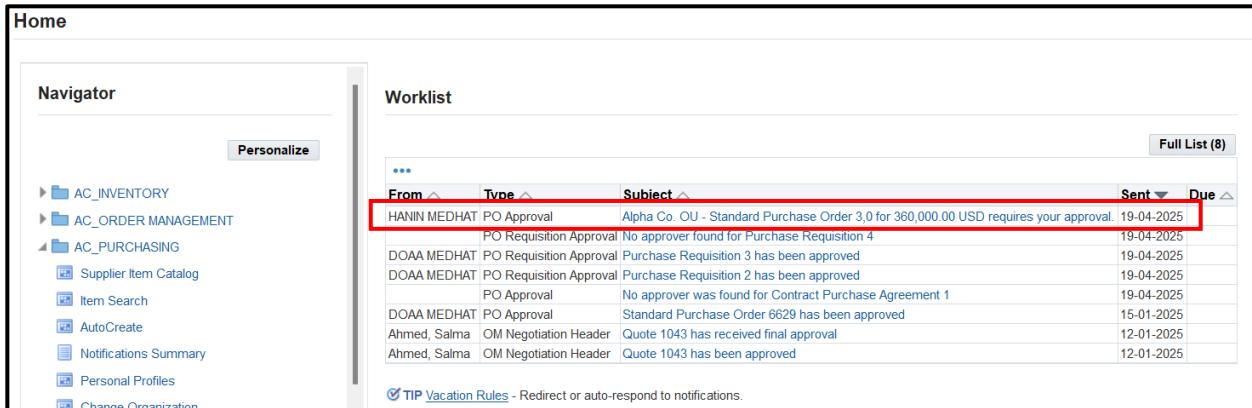
The screenshot shows two windows side-by-side. On the left is the 'Shipments - 3' window, which has tabs for 'Shipments', 'More', and 'Status'. It displays a grid of shipment details. One row is selected, showing: Num (1), Org (AC1), Ship-To (AC_CAIRO), UOM (bottle), Quantity (4000), Promised Date (21-04-2025 00:00), Need-By (21-04-2025 00:00), and Original Promise (button). Below the grid, it shows Line Num (1), Item (foundation), and Description (brand x liquid foundation 30mL). At the bottom are buttons for 'Receiving Controls' and 'Distributions', with 'Distributions' highlighted by a red box and a large red arrow pointing from the text above to this button. On the right is the 'Distributions - 3' window, which has tabs for 'Destination', 'More', and 'Project'. It shows a table with one row: Num (1), Type (Inventory), Requester (MOHAMED MEDHAT, AC_CAIRO), Deliver-To (empty), Subinventory (empty), Quantity (4000), and PO (01-). Below the table are sections for 'PO Account Descriptions' and 'Destination Account Descriptions', both currently empty. At the bottom is a 'Lines And Shipment Details' section with fields for Line Num (1), Shipment Num (1), Org (AC1), Ship-To (AC_CAIRO), Item (foundation), and Description (brand x liquid foundation 30mL). A 'Outside Services' button is at the very bottom right.

8- Approve the PO



The screenshot shows the 'Approve Document - 3' dialog box with the 'Approval Details' tab selected. This tab contains several sections: 'Encumbrance' with checkboxes for Reserve, Unreserve, Use GL Override, and Use Document GL Date to Unreserve, along with fields for Unreserve Date and Accounting Date; 'Approval' with checkboxes for Submit for Approval (which is checked) and Forward (which is also checked), and fields for Forward From (HANIN MEDHAT, AC_PO_APPROVAL), Approval Path (AC_PO_APPROVAL), and Forward To (DOAA MEDHAT); 'Transmission Methods' with checkboxes for Print, Fax, and E-Mail, and fields for FAX Number and E-Mail Address, along with radio buttons for XML and EDI; and buttons for OK and Cancel (B) at the bottom right.

- 9- In this step, the PO Approval is sent to User **Doaa** and click on the PO that requires Approval



Home

Navigator

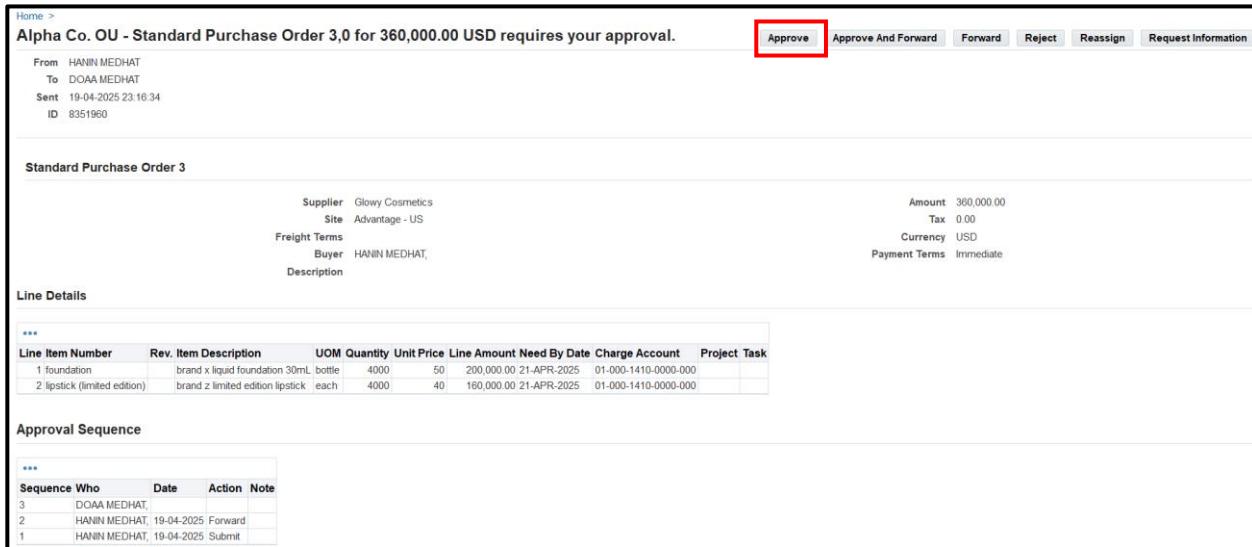
- AC_INVENTORY
- AC_ORDER MANAGEMENT
- AC_PURCHASING**
 - Supplier Item Catalog
 - Item Search
 - AutoCreate
 - Notifications Summary
 - Personal Profiles
 - Change Organization

Worklist

From	Type	Subject	Sent	Due
HANIN MEDHAT	PO Approval	Alpha Co. OU - Standard Purchase Order 3,0 for 360,000.00 USD requires your approval	19-04-2025	
DOAA MEDHAT	PO Requisition Approval	No approver found for Purchase Requisition 4	19-04-2025	
DOAA MEDHAT	PO Requisition Approval	Purchase Requisition 3 has been approved	19-04-2025	
DOAA MEDHAT	PO Requisition Approval	Purchase Requisition 2 has been approved	19-04-2025	
	PO Approval	No approver was found for Contract Purchase Agreement 1	19-04-2025	
DOAA MEDHAT	PO Approval	Standard Purchase Order 6629 has been approved	15-01-2025	
Ahmed, Salma	OM Negotiation Header	Quote 1043 has received final approval	12-01-2025	
Ahmed, Salma	OM Negotiation Header	Quote 1043 has been approved	12-01-2025	

[TIP](#) [Vacation Rules](#) - Redirect or auto-respond to notifications.

- 10- Click Approve



Home >
Alpha Co. OU - Standard Purchase Order 3,0 for 360,000.00 USD requires your approval.

From: HANIN MEDHAT
To: DOAA MEDHAT
Sent: 19-04-2025 23:16:34
ID: 8351960

Standard Purchase Order 3

Supplier: Glow Cosmetics	Amount: 360,000.00
Site: Advantage - US	Tax: 0.00
Freight Terms:	Currency: USD
Buyer: HANIN MEDHAT,	Payment Terms: Immediate
Description:	

Line Details

Line Item Number	Rev. Item Description	UOM	Quantity	Unit Price	Line Amount	Need By Date	Charge Account	Project Task
1 foundation	brand x liquid foundation 30mL bottle	bottle	4000	50	200,000.00	21-APR-2025	01-000-1410-0000-000	
2 lipstick (limited edition)	brand z limited edition lipstick each	each	4000	40	160,000.00	21-APR-2025	01-000-1410-0000-000	

Approval Sequence

Sequence	Who	Date	Action	Note
3	DOAA MEDHAT,			
2	HANIN MEDHAT;	19-04-2025	Forward	
1	HANIN MEDHAT;	19-04-2025	Submit	



11- Navigate to the [Purchase Orders > Purchase Orders Summary](#) and type PO number

Find Purchase Orders

Operating Unit	Alpha Co. OU	Type	<input type="text"/>
Number	3	Currency	<input type="text"/>
Release	<input type="text"/>	Site	<input type="text"/>
Supplier	<input type="text"/>	<input type="checkbox"/> Show External Locations	
Ship-To Org	<input type="text"/>	Line Type	<input type="text"/>
Bill-To	<input type="text"/>	Buyer	HANIN MEDHAT,
Ship-To	<input type="text"/>	<input type="checkbox"/> View Releases	
Line	<input type="text"/>	<input type="checkbox"/> Consumption Advice	
Shipment	<input type="text"/>	<input type="checkbox"/> Global Agreement	
<input checked="" type="checkbox"/> Headers <input type="radio"/> Lines <input type="radio"/> Shipments <input type="radio"/> Distributions			

Line **Date Ranges** **Status** **Related Documents** **Deliver To** **Accounting** **Projects**

Item, Rev	<input type="text"/>	<input type="text"/>
Job	<input type="text"/>	
Category	<input type="text"/>	
Description	<input type="text"/>	
Supplier Item	<input type="text"/>	
VMI	<input type="text"/>	
Consigned	<input type="text"/>	

Results

Headers
 Lines
 Shipments
 Distributions

Clear **New Release (B)** **New PO** **Find (J)**



NEXT
CAREER DEVELOPMENT ACADEMY

	Approval Status	Change Status	Order Date	Supplier	Supplier Site	Currency
1	Approved		19-04-2025 23:	Glowy Cosmetics	Advantage - US	USD
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
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10- Receiving Transactions

10.1. Receive shipment in the Receiving Area

- 1- Navigate to the [Purchasing Responsibility \(AC_Purchasing\) > Receiving > Receipts](#)

Find Expected Receipts (AC1)

Supplier and Internal	Customer
Operating Unit <input type="text" value="Alpha Co. OU"/>	
Source Type <input type="button" value="Supplier"/>	
Purchase Order <input type="text" value="3"/>	Release <input type="checkbox"/>
Line <input type="checkbox"/>	Shipment <input type="checkbox"/>
Requisition <input type="checkbox"/>	Shipment <input type="checkbox"/>
Supplier <input type="text" value="Glowy Cosmetics"/>	Supplier Site <input type="text"/>
<input type="checkbox"/> Include Closed POs	
Receiving Location <input type="text"/>	
Item Date Ranges Shipments Destination	
Item, Rev <input type="text"/> Category <input type="text"/> Description <input type="text"/> Supplier Item <input type="text"/>	
<input type="button" value="Unordered"/> <input type="button" value="Clear"/> <input style="border: 2px solid red;" type="button" value="Find"/>	

Receipt Header (AC1)

<input checked="" type="radio"/> New Receipt	<input type="radio"/> Add To Receipt
Receipt <input type="text"/>	Receipt Date <input type="text" value="19-04-2025 23:34:2"/>
Shipment <input type="text"/>	Shipped Date <input type="text"/>
Packing Slip <input type="text"/>	Waybill/Airbill <input type="text"/>
Freight Carrier <input type="text"/>	Bill of Lading <input type="text"/>
Containers <input type="text"/>	Received By <input type="text" value="DOAA MEDHAT, "/>
Supplier <input type="text" value="Glowy Cosmetics"/>	
Comments <input type="text"/>	[<input type="checkbox"/>]



2- Click **Save** to finalize the transaction.

10.2. Receipt Transactions (Receiving shipment in inventory)

- 1- Navigate to the [Purchasing Responsibility \(AC_Purchasing\) > Receiving > Receiving Transaction](#)
- 2- Type the PO Number and click **Find** to display matching receipts.

Find Receiving Transactions (AC1)

Supplier and Internal	Customer
Operating Unit Alpha Co. OU	
Source Type Supplier	Receipt
Purchase Order 3	Release
Line	Shipment
Requisition	Shipment
Supplier Glowy Cosmetics	Supplier Site
Current Location	
Item Receipt Details Transaction Details Shipments Destination	
Item, Rev <input type="text"/> Category <input type="text"/> Description <input type="text"/> Supplier Item <input type="text"/>	
<input type="button" value="Clear"/> <input style="border: 2px solid red; background-color: #e0e0e0; color: black; padding: 2px 10px;" type="button" value="Find"/>	



- 3- Select the **Line** you want to process. This item is lot-controlled, so click the lot-serial button.

- 4- Generate a lot from the “generate lot” button. The quantity must equal the lot quantity entered. Save to complete the receiving transaction. Now the items are stored in the C_COS sub-inventory.

Item	foundation	brand x liquid foundation 30mL		
Revision	3	UOM	Bot	Secondary UOM
Subinventory	C_COS	Quantity	4000	Secondary Quantity
Locator		Lot Quantity Entered	4000	Secondary Lot Quantity Entered
Lot Numbers				
Parent Lot Number	Lot Number	Expiration Date	Quantity	Secondary Quantity
	LFND-0001	14-04-2026 23:41:57	2000	
	LFND-0002	14-04-2026 23:41:57	2000	
Quantity Available	0	Secondary Quantity Available		
Quantity On-Hand	0	Secondary Quantity On-Hand		

11- Contract Purchase Agreement

- 1- Navigate to the **Purchasing Responsibility (AC_Purchasing) > Purchase Orders > Purchase Orders**
- 2- Enter Header Information, Select the Operating Unit, Choose the Supplier and Supplier Site, Set the Purchase Order Type to Contract Purchase Agreement.
- 3- Define the Agreement Amount (total contract value).

Purchase Orders - [New]

Operating Unit	Alpha Co. OLU	Created	21-04-2025 04:25:26	P-Card		
PO, Rev	9	Type	Contract Purchase Agreement	Contact		
Supplier	ElecTech	Site	Chongqing	Currency	USD	
Ship-To	AC_OU	Bill-To	AC_OU	Amt Agreed	4,000,000.00	
Buyer	Zeyad,	Status	Incomplete	Released		
Description						<input checked="" type="checkbox"/> Global
						<input type="checkbox"/> Enable All Sites

Lines Price Reference Reference Documents More Agreement Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price
1									
2									
3									
4									
5									
6									
7									
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Item Catalog... Currency... Terms Shipments Approve...

Approve Document - 9

Approval Details		Additional Options
Encumbrance <input type="checkbox"/> Reserve <input type="checkbox"/> Unreserve <input type="checkbox"/> Use GL Override <input type="checkbox"/> Use Document GL Date to Unreserve		
Unreserve Date: <input type="text"/> Accounting Date: <input type="text"/>		
Approval <input checked="" type="checkbox"/> Submit for Approval <input checked="" type="checkbox"/> Forward		
Forward From: Zeyad, Approval Path: AC_CPA_APPROVAL Forward To: <input type="text"/>		
Note: <input type="text"/> Change Summary: <input type="text"/>		
Transmission Methods <input type="checkbox"/> Print <input type="checkbox"/> Fax <input type="checkbox"/> E-Mail		
FAX Number: <input type="text"/> E-Mail Address: <input type="text"/>		
<input type="radio"/> XML <input type="radio"/> EDI		
OK Cancel (B)		



4- Using the Contract Purchase Agreement in the PO (AutoCreate)

Find Requisition Lines

Operating Unit	Alpha Co. OU	Approved	Yes	Buyer	HANIN MEDHAT,
Requisition				Requester	
Emergency PO Number				Preparer	
Supplier Sourcing				Supplier List	
Supplier				Supplier Site	
Document Type				Document	
	<input type="checkbox"/> Global			Negotiation Number	
	<input type="checkbox"/> VMI Only			Minimum Amount	
	<input type="checkbox"/> Show External Locations			Currency	
Ship-To				Rate Type	

Line Status

Item, Rev		...	
Job			
Category	HAIR STYLING TOOLS.		
Description			
Line Type			

Buttons

- Clear
- Find



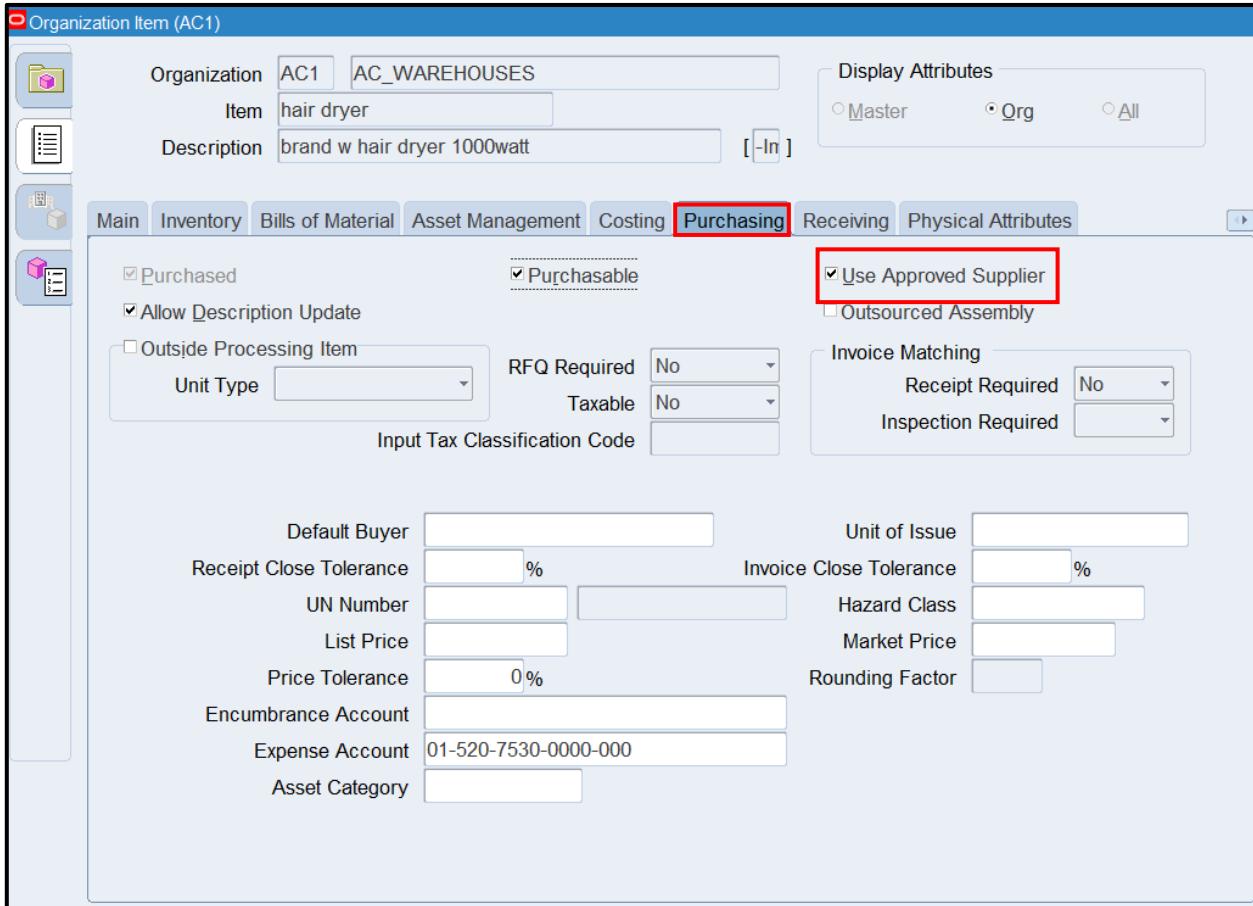
NEXT
CAREER DEVELOPMENT ACADEMY

- 5- Make sure that the **Supplier Name** and **Site** match the supplier and site in the CPA from the **Reference Documents** tab, select the contract number, and click **Approve**.

- 6- Continue the PO cycle, and view the CPA afterwards, note that the total amount released equals the PO total.

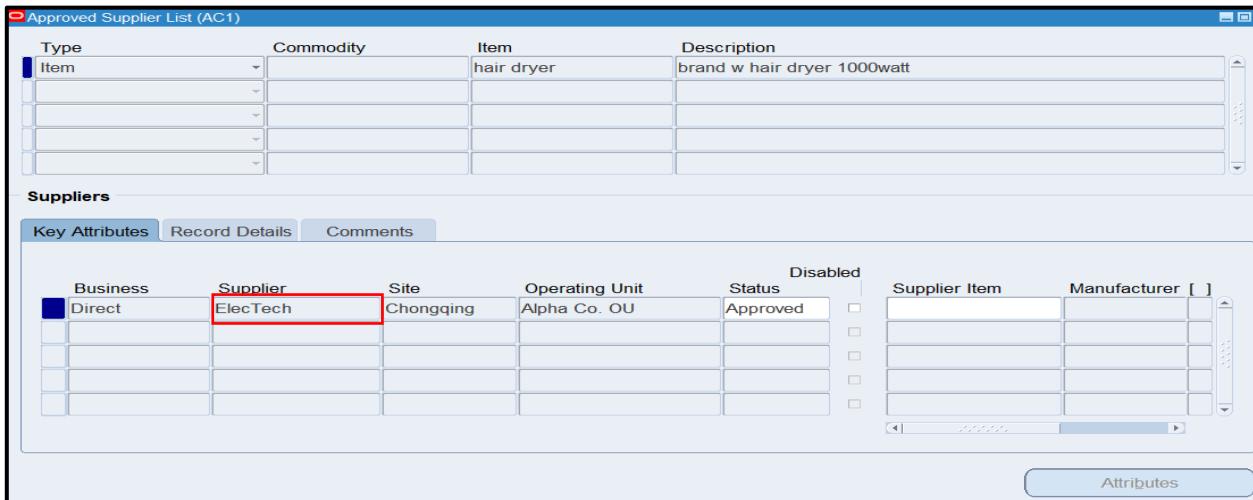
12- Approved supplier & approved supplier list:

- 1- Make sure that you have checked the Approved Supplier in the Item Definition Purchasing Tab.



The screenshot shows the 'Organization Item (AC1)' screen. At the top, there are fields for 'Organization' (AC1), 'Item' (hair dryer), and 'Description' (brand w hair dryer 1000watt). To the right, there are 'Display Attributes' buttons: 'Master' (radio button), 'Org' (radio button, selected), and 'All' (radio button). Below these are tabs: Main, Inventory, Bills of Material, Asset Management, Costing, **Purchasing**, Receiving, and Physical Attributes. The 'Purchasing' tab is active. Underneath, there are several groups of checkboxes and dropdowns. One group contains 'Purchased', 'Allow Description Update', 'Outside Processing Item' (unchecked), 'RFQ Required' (No), 'Taxable' (No), and 'Input Tax Classification Code'. Another group contains 'Purchasable', 'Outsourced Assembly' (unchecked), 'Invoice Matching' (Receipt Required No, Inspection Required), and 'Default Buyer' (text box). Further down are 'Receipt Close Tolerance' (%), 'UN Number' (text box), 'List Price' (text box), 'Price Tolerance' (0%), 'Encumbrance Account' (text box), 'Expense Account' (text box 01-520-7530-0000-000), 'Asset Category' (text box), 'Unit of Issue' (text box), 'Invoice Close Tolerance' (%), 'Hazard Class' (text box), 'Market Price' (text box), and 'Rounding Factor' (text box). The 'Use Approved Supplier' checkbox is highlighted with a red box.

- 2- Navigate to the Supply Base > Approved Supplier List



The screenshot shows the 'Approved Supplier List (AC1)' screen. At the top, there is a table with columns: Type (Item), Commodity (hair dryer), Item (brand w hair dryer 1000watt), and Description (brand w hair dryer 1000watt). Below this is a section titled 'Suppliers' with tabs: Key Attributes, Record Details, and Comments. Under 'Key Attributes', there is a table with columns: Business (Direct), Supplier (ElecTech), Site (Chongqing), Operating Unit (Alpha Co. OU), Status (Approved), and Disabled (checkbox). The 'Supplier' column for the first row is highlighted with a red box. To the right of the table are sections for 'Supplier Item' and 'Manufacturer' with dropdown menus. At the bottom right is a 'Attributes' button.



NEXT
CAREER DEVELOPMENT ACADEMY

- 3- Note that when a supplier not on the approved supplier list that is chosen, this error message will pop up

Approval Errors and Warnings - 10

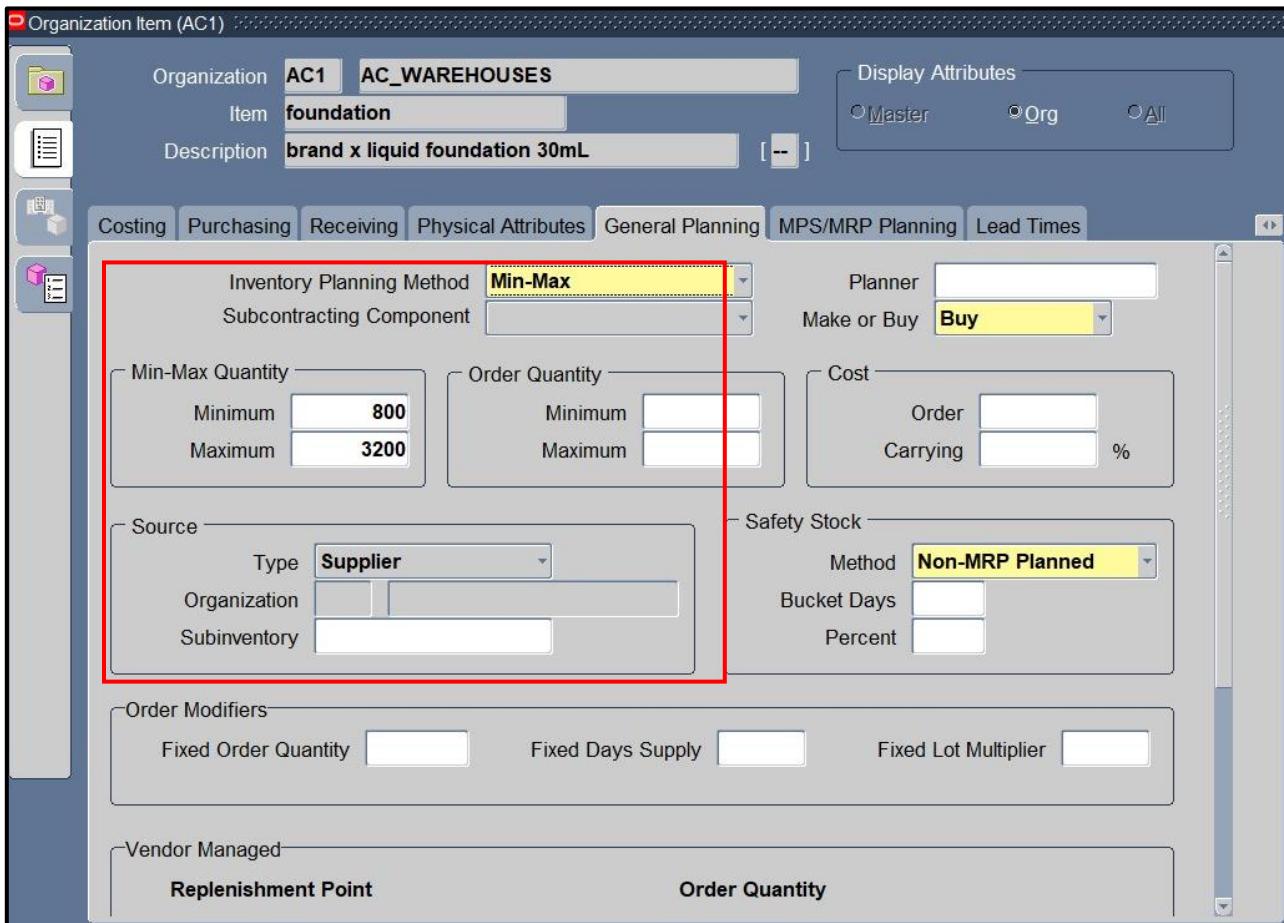
Error: Error: Line # 1 Schedule # 1 Item is restricted and the supplier is not an approved supplier for this item.

+-----+

13- Min-Max Transactions

Min-Max Planning involves setting a minimum quantity (reorder point) and a maximum quantity (target stock level) for inventory items. When the stock level drops below the minimum, Oracle generates a requisition to replenish inventory up to the maximum level.

- 1- Set up the Min-Max Parameter from [Inventory Responsibility > Items > Organization Items](#) and set the Inventory Planning Method to **Min-Max Planning**.



The screenshot shows the Oracle Inventory Responsibility interface for setting up MPS/MRP Planning parameters for an organization item. The item is identified as 'foundation' in 'AC1 AC_WAREHOUSES'. The 'MPS/MRP Planning' tab is active. A red box highlights the 'Inventory Planning Method' section, which is set to 'Min-Max'. Other visible settings include 'Subcontracting Component' (empty), 'Planner' (empty), 'Make or Buy' (set to 'Buy'), 'Cost' fields for Order and Carrying, 'Source' type 'Supplier', 'Safety Stock' method 'Non-MRP Planned', and 'Order Modifiers' for Fixed Order Quantity, Fixed Days Supply, and Fixed Lot Multiplier. The 'Vendor Managed' section includes 'Replenishment Point' and 'Order Quantity' fields.

2- Run the **Min-Max Planning Report** and specify the **Parameters**.

Submit Request

Run this Request

Name	Min-max planning report
Operating Unit	
Parameters	
Language	American English
At these Times	
Run the Job	As Soon as Possible
Upon Completion	
<input checked="" type="checkbox"/> Save all Output Files	
Layout	
Notify	
Print to	noprint
Help (C)	

Parameters

Planning Level	Organization
Subinventory	
Item Selection	Items under minimum quantity
Category Set	Inv.Items
Categories From	
To	
Items From	
To	
Planners From	
To	
Buyers From	
To	
Sort by	Inventory item
Demand Cutoff Date	25-04-2025
Demand Cutoff Date Offset	0
Supply Cutoff Date	25-04-2025
Supply Cutoff Date Offset	0
Restock	Yes

OK

Parameters

Demand Cutoff Date Offset	0	
Supply Cutoff Date	25-04-2025	
Supply Cutoff Date Offset	0	
Restock	Yes	
For Repetitive Item		
Default Delivery To	AC_AC1	inventory org location
Net Unreserved Orders	Yes	
Net Reserved Orders	Yes	
Net WIP Demand	Yes	
Include PO Supply	Yes	
Include Move Order Supply	Yes	
Include WIP Supply	Yes	
Include Interface Supply	Yes	
Include Nonnettable	No	
Lot Control	Include Both Lot and Non-Lot Controlled Items	
Display Format	Display all information	
Display Item Description	No	
Exclude Cycle Count Reservations	No	

OK Cancel Clear Help

3- View the output of the report.

Report Parameters										
Organization: AC_WAREHOUSES Level: Organization										
SubInventory: Selection: Items under minimum quantity										
Category Set: Inv.Items										
Categories From: To: Items From: To: Planners From: To: Buyers From: To: Sort By: Inventory item										
Demand Cutoff: 25-APR-25 Supply Cutoff: 25-APR-25 Restock: Yes Repetitive Item: Do Not Restock										
Default Delivery Location: AC.AC1 Net Unreserved Demand: Yes Net Reserved Demand: Yes Net WIP Demand: Yes Include PO Supply: No Include Move Order Supply: Yes Include WIP Supply: Yes Include Interface Supply: No Include Nonnettable: No Lot Control: Include Both Lot and Non-Lot Controlled Items Display Format: Display all information										
Display Item Description: No										
AC_WAREHOUSES Min Max Report										
Report Date: 25-APR-2025 10:35 Page: 2										
Item	Category	Minimum Quantity	Maximum Quantity	On Hand Quantity	Supply Quantity	Demand Quantity	Available Quantity	Minimum	Order Quantity	Reorder Quantity
foundation	MAKEUP.FOUNDATION	800	3200	95	0	0	95			3105
hair dryer	HAIR STYLING TOOLS.HAIR DRYER	400	1600	99	0	0	99			1501
lipstick (limited edition)	MEDICINE.TABLETS	800	3200	100	0	0	100			3100

4- Run Requisition Import Request.

Submit Request

Run this Request

Name	Requisition Import	Copy
Operating Unit	Alpha Co. OU	
Parameters		
Language	American English	

Parameters

Import Source	INV	INV
Import Batch ID		
Group By	All	Group all Reqs together
Last Requisition Number		
Multiple Distributions	No	No
Initiate Approval after Reqlimport	Yes	

OK Cancel Clear

Help (C) Submit Cancel

- 5- Find Requisitions from [Purchasing Responsibility > Requisitions > Requisition Summary](#) to review and approve requisitions.

Find Requisitions

Operating Unit	<input type="text" value="Alpha Co. OU"/>	Type	<input type="text"/>															
Requisition Number	<input type="text"/>	Requester	<input type="text"/>															
Preparer	<input type="text"/>	Modified	<input type="text"/>															
Buyer	<input type="text"/>	Import Source	<input type="text"/>															
Reference Num	<input type="text"/>																	
Line	<input type="text"/>	Line Type	<input type="text"/>															
<input type="button" value="Line"/> <input type="button" value="Status"/> <input type="button" value="Date Ranges"/> <input type="button" value="Sourcing"/> <input type="button" value="Deliver To"/> <input type="button" value="Related Documents"/> <input type="button" value="Accounting"/> <input type="button" value="New"/>																		
<table border="0"> <tr> <td>Creation</td> <td><input type="text" value="25-04-2025 00:00:00"/></td> <td>-</td> <td><input type="text"/></td> <td>...</td> </tr> <tr> <td>Need-By</td> <td><input type="text"/></td> <td>-</td> <td><input type="text"/></td> <td></td> </tr> <tr> <td>Closed</td> <td><input type="text"/></td> <td>-</td> <td><input type="text"/></td> <td></td> </tr> </table>				Creation	<input type="text" value="25-04-2025 00:00:00"/>	-	<input type="text"/>	...	Need-By	<input type="text"/>	-	<input type="text"/>		Closed	<input type="text"/>	-	<input type="text"/>	
Creation	<input type="text" value="25-04-2025 00:00:00"/>	-	<input type="text"/>	...														
Need-By	<input type="text"/>	-	<input type="text"/>															
Closed	<input type="text"/>	-	<input type="text"/>															
<input type="button" value="Clear"/> <input type="button" value="New"/> <input type="button" value="Find (B)"/>																		

- ## 6- Click the Lines button



NOTE: These three lines are from the Min-Max Planning Report.

- 7- Continue the PO steps from the AutoCreate function.