



وزارة الاتصالات  
وتقنولوجيا المعلومات



## ERP IMPLEMENTATION

# DEPI SENSORS

Advisor:  
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Prepared by :  
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Members**

**NEXT**  
CAREER DEVELOPMENT ACADEMY

# DEPI

## TEAM MEMBERS

(NEXT12\_ONL1\_ERP2\_M1e)

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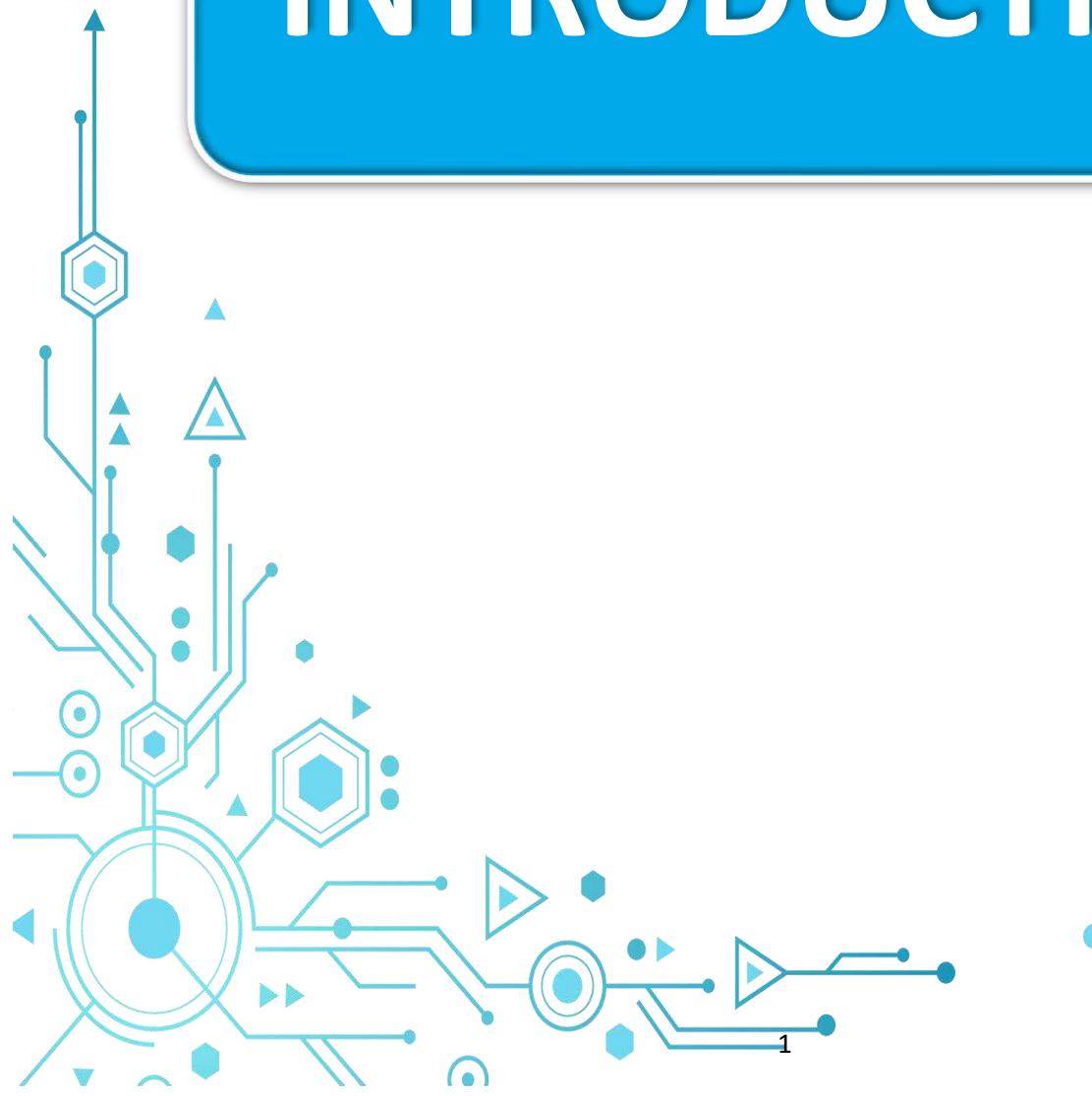


### YOUSRA YUSUF

Customer Experience Specialist



# INTRODUCTION



## ➤ About Oracle

Oracle ERP (Enterprise Resource Planning) is a comprehensive suite of integrated applications designed to help organizations manage and automate core business processes. Here are some key features and benefits:

### Key Features:

- 1. Financial Management:**  
Streamlines financial operations, including accounting, budgeting, and reporting.
- 2. Supply Chain Management:**  
Enhances inventory management, procurement, and logistics.
- 3. Human Capital Management:**  
Manages employee records, payroll, recruitment, and performance.
- 4. Project Management:**  
Assists in planning, executing, and monitoring projects.
- 5. Customer Relationship Management (CRM):**  
Manages customer interactions and sales activities.
- 6. Analytics and Reporting:**  
Provides real-time insights and analytics for better decision-making.

## ➤ Advantages:

### 1. Integration:

Seamlessly connects various business functions, improving efficiency and data accuracy.

### 2. Scalability:

Can grow with the organization, accommodating increased complexity and volume.

### 3. Cloud Accessibility:

Offers cloud-based solutions for remote access and reduced IT overhead.

### 4. Compliance:

Helps organizations comply with industry regulations and standards.

## ➤ Use Cases:

### ▪ Manufacturing:

Optimizing production schedules and inventory levels.

### ▪ Retail:

Managing sales, inventory, and customer data.

### ▪ Healthcare:

Streamlining patient management and financial operations.

Overall, Oracle ERP aims to improve operational efficiency, reduce costs, and enhance business agility.

## ➤ Benefits of using Oracle in DEPI Sensors Project

Implementing Oracle solutions in IoT (Internet of Things) sensors projects offers numerous benefits that can enhance data management, analytics, and overall project effectiveness. Here are some key benefits:

### 1. Data Integration

- Oracle provides robust tools for integrating data from various IoT sensors, enabling seamless data flow and comprehensive analysis across different systems.

### 2. Real-Time Analytics

- With Oracle's advanced analytics capabilities, organizations can process and analyze data from IoT sensors in real time, allowing for immediate insights and quicker decision-making.

### 3. Scalability

- Oracle's cloud infrastructure supports scalable IoT projects, allowing organizations to easily expand their sensor networks and data processing capabilities as needed.

### 4. Enhanced Security

- Oracle offers strong security features to protect sensitive data collected from IoT sensors, including encryption, access controls, and compliance with industry standards.

### 5. Machine Learning and AI

- Oracle integrates machine learning and AI tools, enabling predictive analytics and smarter decision-making based on sensor data, such as anomaly detection and trend forecasting.

### 6. Centralized Management

- Oracle IoT Cloud provides a centralized platform for managing and monitoring IoT devices, simplifying operations and maintenance.

### 7. Improved Operational Efficiency

- By leveraging real-time data from IoT sensors, organizations can optimize processes, reduce downtime, and improve resource allocation, leading to increased efficiency.

### 8. Cost Reduction

- Effective data management and analytics can lead to reduced operational costs by identifying inefficiencies and enabling proactive maintenance of equipment.

## 9. Enhanced Customer Experiences

- Insights gained from IoT data can help organizations better understand customer needs and preferences, leading to improved products and services.

## 10. Interoperability

- Oracle solutions support various IoT protocols and standards, ensuring compatibility with a wide range of devices and systems, facilitating easier integration.

## 11. Risk Management

- The system provides tools for identifying and managing risks, ensuring that organizations can respond swiftly to challenges and maintain business continuity.

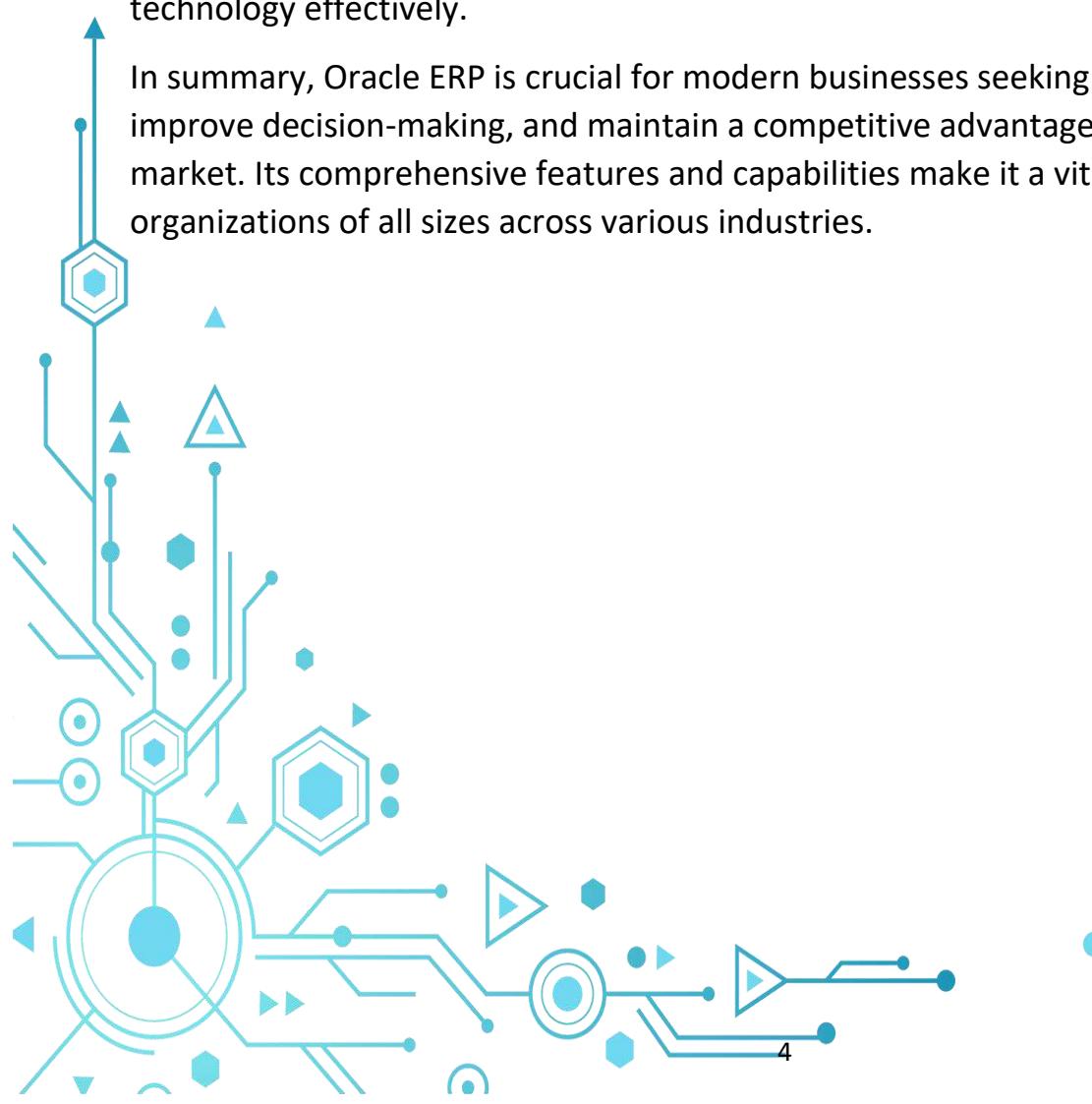
## 12. Cloud Flexibility

- Oracle offers cloud-based ERP solutions, providing flexibility, accessibility, and reduced infrastructure costs. This allows remote work and easier updates.

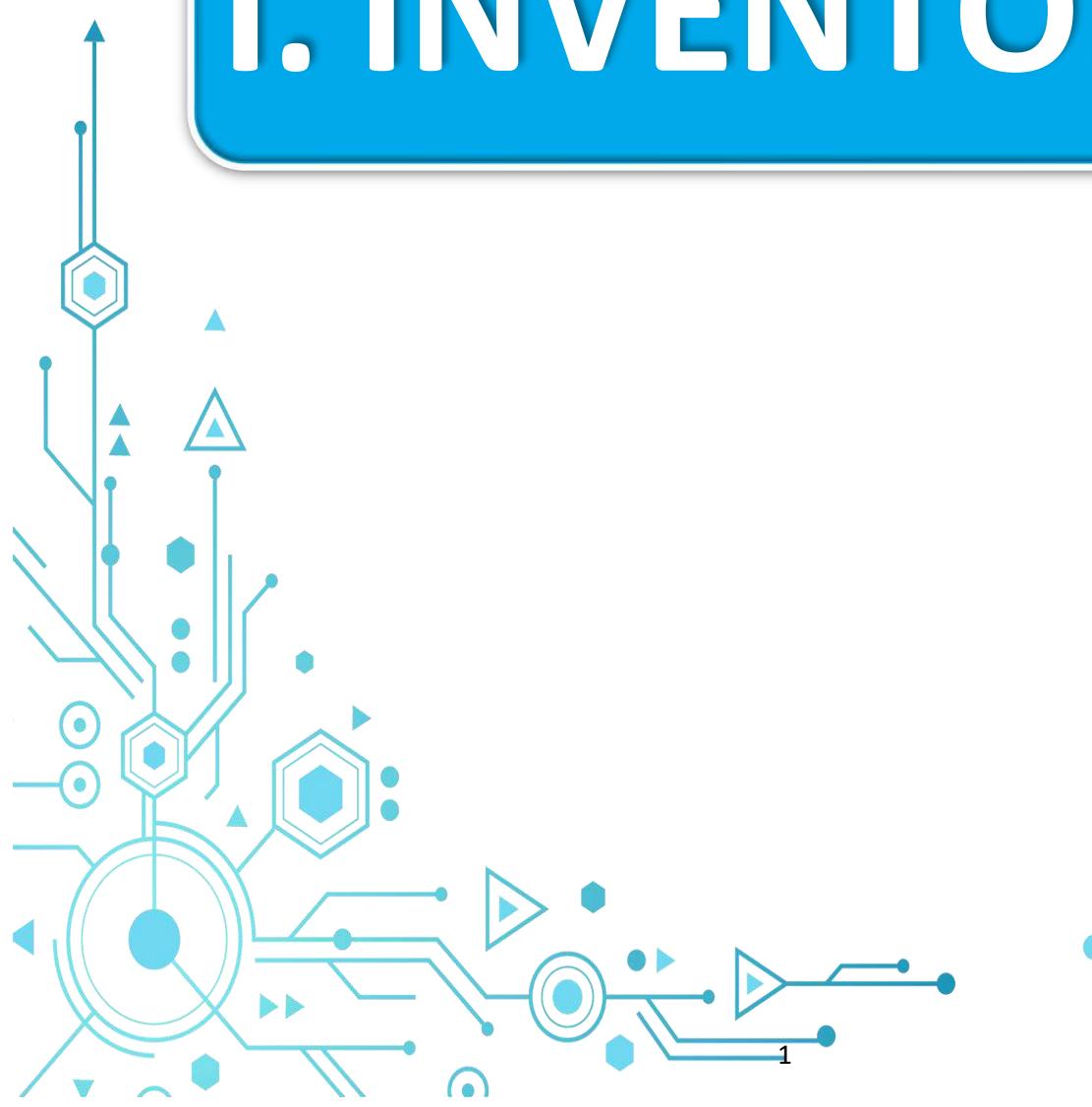
## ➤ Conclusion

Incorporating Oracle into IoT sensors projects enhances data management, security, and analytics, leading to improved operational efficiency and better decision-making. These benefits make Oracle a strong choice for organizations looking to leverage IoT technology effectively.

In summary, Oracle ERP is crucial for modern businesses seeking to enhance efficiency, improve decision-making, and maintain a competitive advantage in a rapidly changing market. Its comprehensive features and capabilities make it a vital tool for organizations of all sizes across various industries.



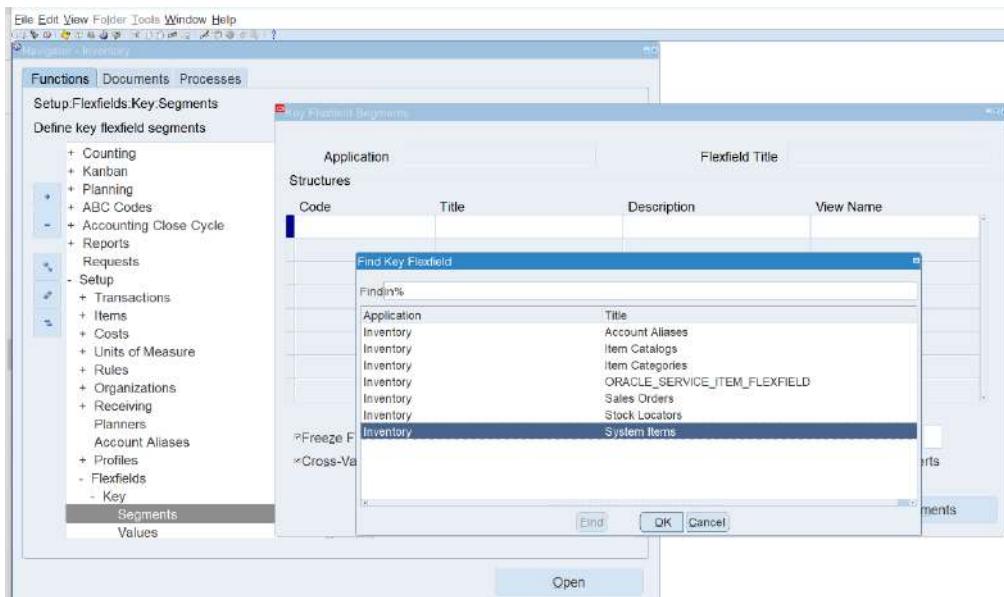
# I. INVENTORY



## 1. (Key System Item)

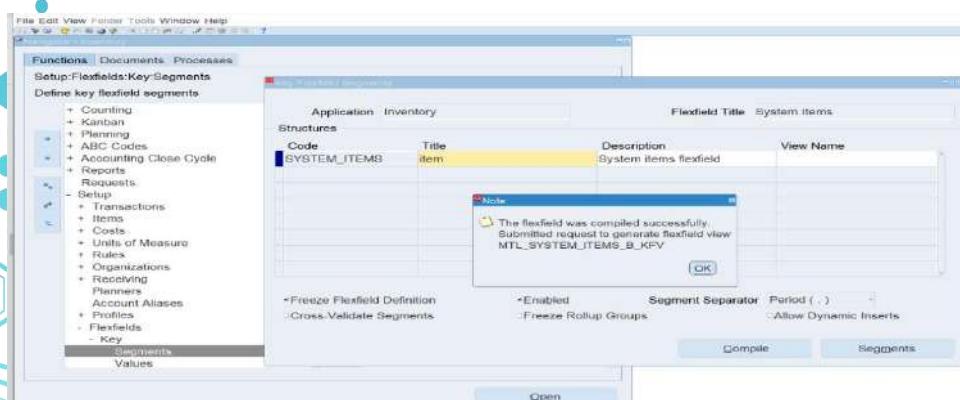
### Step 1: Defining Key Flexfield Segments

- In the Inventory Responsibility -> Setup (menu) -> Flexfields (submenu)-> Key (function)-> Segments (parameter).
- Frome **Find Key Flexfield window**, select the "Inventory" application and the **System Items** flexfield from a list of predefined flexfields (like Account Aliases, Item Categories, etc.).
- Press **OK** to proceed.



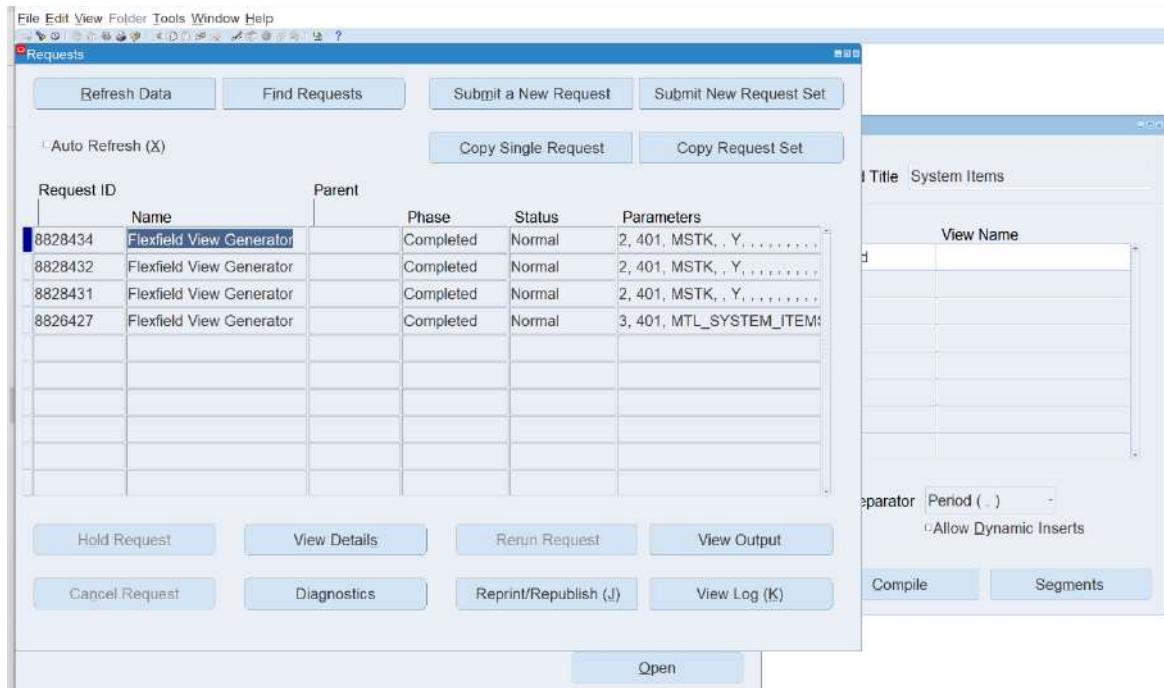
### Step 2: Compiling the Key Flexfield

- The flexfield Title is displayed as "System items flexfield," and the Code is labeled as "SYSTEM\_ITEMS."
- Insert title: item
- You press the Compile button and a pop-up message confirms the successful compilation
- Additionally, a request is submitted to generate the corresponding database view: MTL\_SYSTEM\_ITEMS\_B\_KFV



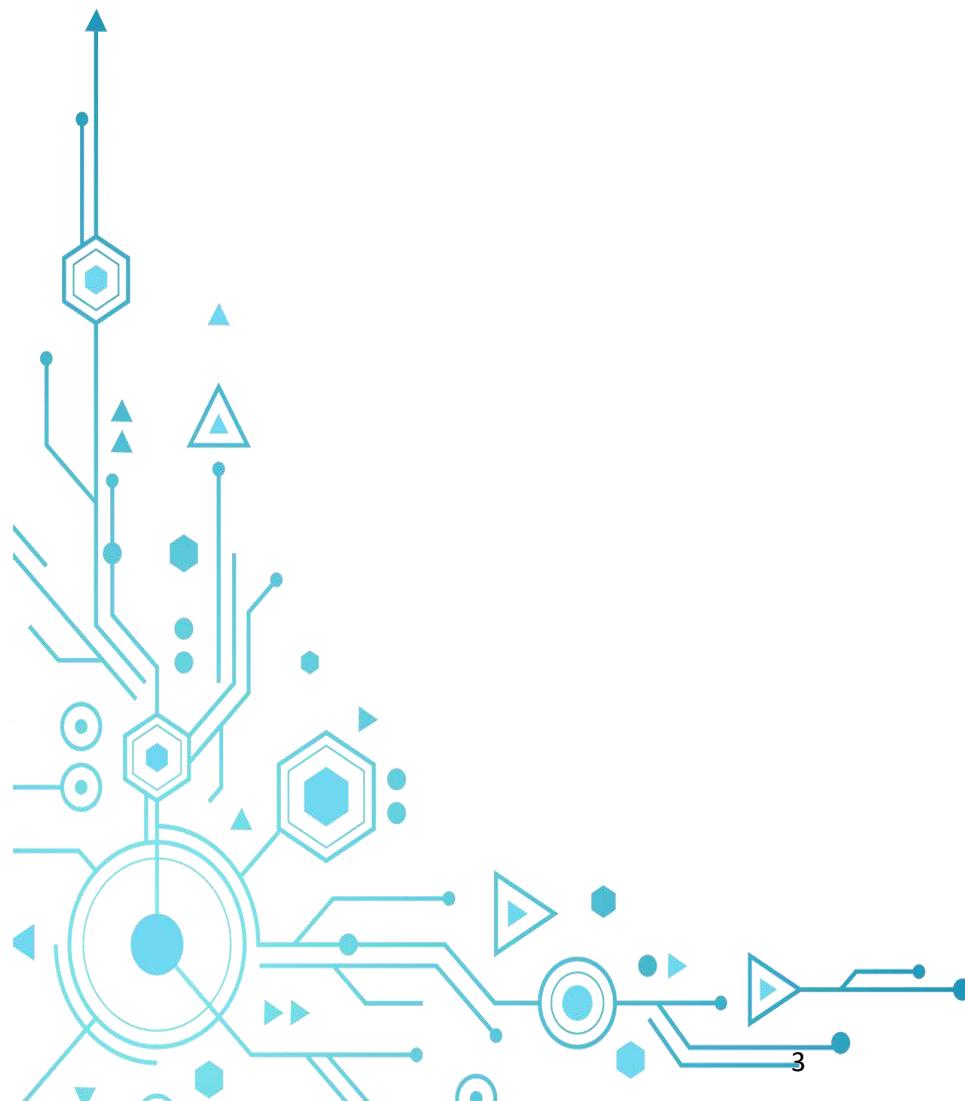
### Step 3: Viewing the Concurrent Requests

- From View (in menu bar) -> Requests, the window displaying the request the Phase as "Completed" with Status as "Normal," indicating that the requests were successfully processed.
- The Request IDs (e.g., 8828434) and the parameters for the requests are displayed, which include the flexfield and structure details.



The screenshot shows the Oracle Database Requests window. The main pane displays a grid of concurrent requests with the following columns: Request ID, Name, Parent, Phase, Status, and Parameters. The first row (highlighted in blue) shows Request ID 8828434 with Name 'Flexfield View Generator', Parent null, Phase 'Completed', Status 'Normal', and Parameters '2, 401, MSTK, , Y, .....'. Other rows show similar entries for Request IDs 8828432, 8828431, and 8826427. Below the grid are several action buttons: Hold Request, View Details, Rerun Request, View Output, Cancel Request, Diagnostics, Reprint/Republish (J), and View Log (K). To the right of the main window is a smaller, overlapping window titled 'System Items' with a 'View Name' list and various configuration options like Separator, Period, Allow Dynamic Inserts, Compile, and Segments.

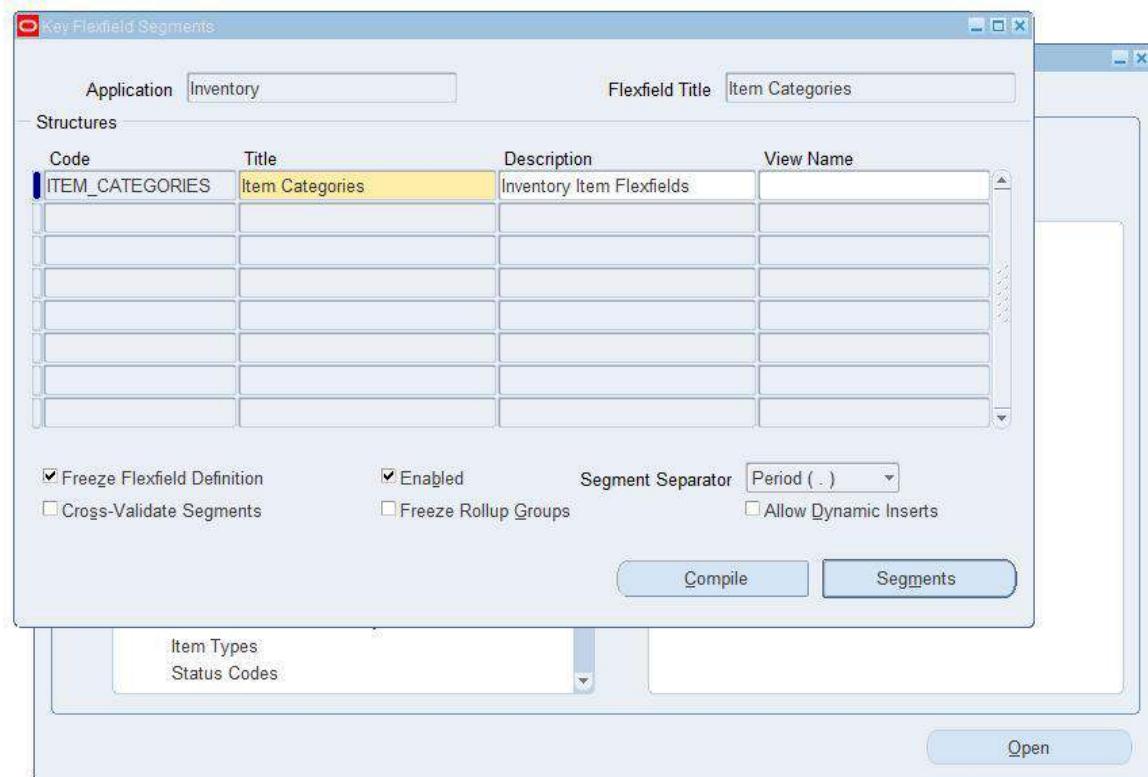
Request ID	Name	Parent	Phase	Status	Parameters
8828434	Flexfield View Generator		Completed	Normal	2, 401, MSTK, , Y, .....
8828432	Flexfield View Generator		Completed	Normal	2, 401, MSTK, , Y, .....
8828431	Flexfield View Generator		Completed	Normal	2, 401, MSTK, , Y, .....
8826427	Flexfield View Generator		Completed	Normal	3, 401, MTL_SYSTEM_ITEMS



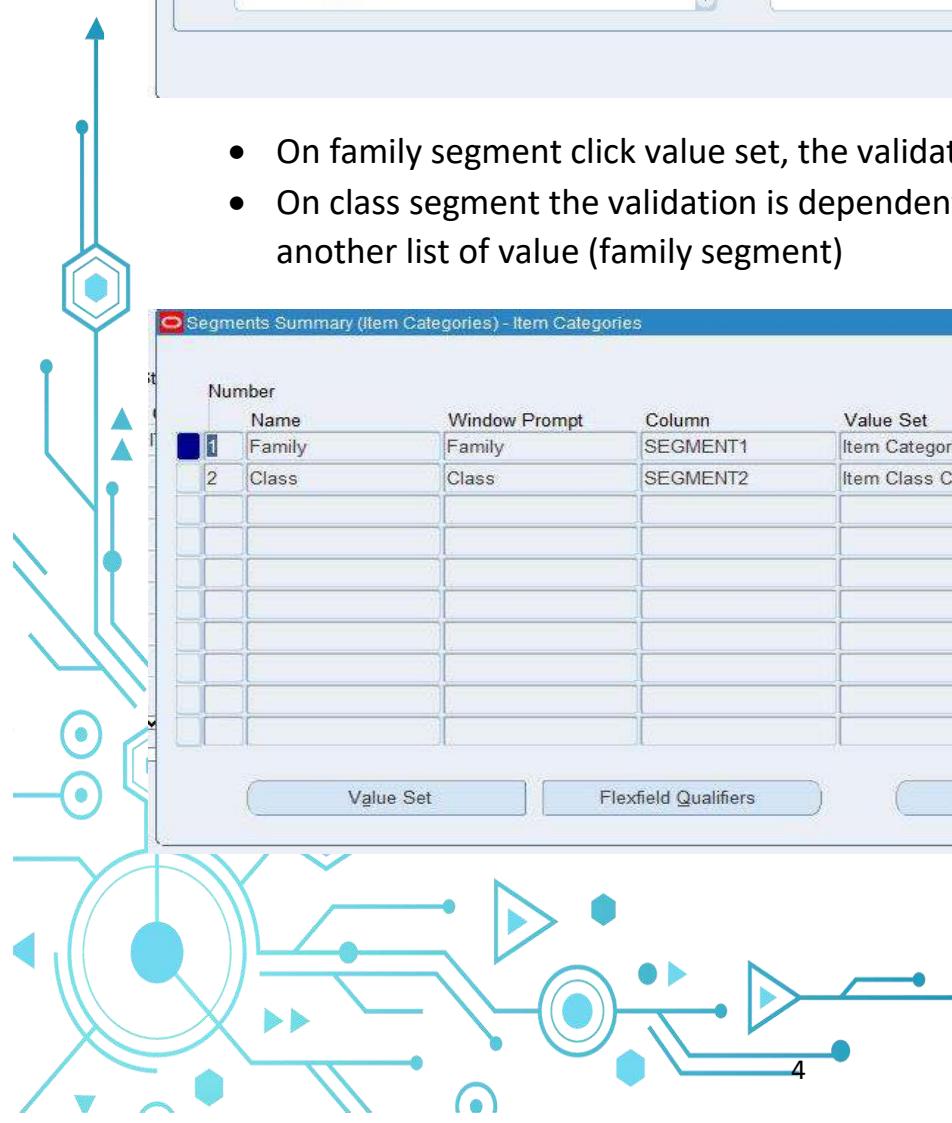
## 2. Item category

### Step 1:

- Set up -> flexfield -> key flexfield -> segment
- In application field click search -> inventory
- Insert item category structure
- Click segment



- On family segment click value set, the validation type is independent
- On class segment the validation is dependent means its connected with another list of value (family segment)



**Segments Summary (Item Categories) – Item Categories**

Number	Name	Window Prompt	Column	Value Set	Enabled	Updatable
1	Family	Family	SEGMENT1	Item Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Class	Class	SEGMENT2	Item Class Category	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons at the bottom include Value Set, Flexfield Qualifiers, New, and Open.

**Value Sets**

Value Set Name	Item Class Category	Usages
Description	Item class category flexfield value set	
List Type	List of Values	Security Type No Security
<b>Format Validation</b>		
Format Type	Char	Maximum Size 10 Precision
<input type="checkbox"/> Numbers Only (0-9) <input checked="" type="checkbox"/> Uppercase Only (A-Z) <input type="checkbox"/> Right-justify and Zero-fill Numbers (0001)		
Min Value	Max Value	
<b>Value Validation</b>		
Validation Type	Dependent	Edit Information

**Value Sets**

Value Set Name	Item Categories	Usages
Description	Item categories flexfield value set	
List Type	List of Values	Security Type No Security
<b>Format Validation</b>		
Format Type	Char	Maximum Size 10 Precision
<input type="checkbox"/> Numbers Only (0-9) <input checked="" type="checkbox"/> Uppercase Only (A-Z) <input type="checkbox"/> Right-justify and Zero-fill Numbers (0001)		
Min Value	Max Value	
<b>Value Validation</b>		
Validation Type	Independent	Edit Information

## Step 2:

- To insert category information: setup -> flexfield-> validation-> values
- Find with key flexfield insert (application, title, etc.)
- Click find
- Insert the category values and description then save
- Search again with the Family Segment, insert values and description (repeat the process with class segment)
- A request will run to compile the two segments
- From view -> requests (the requests are completed, normal)



Sense the Future

The screenshot shows the 'Segment Values' dialog box with the 'Key Flexfield' radio button selected. A sub-dialog titled 'Find Key Flexfield Segment' is open. On the left, a 'Find Values By' section contains radio buttons for 'Value Set', 'Key Flexfield' (which is checked), 'Descriptive Flexfield', and 'Concurrent Program'. To the right, application-specific fields are shown: 'Application' (Inventory), 'Title' (Item Categories), 'Structure' (Item Categories), and 'Segment'. Below these are three dropdown menus: 'Independent Value', 'Value', and 'Description'. At the bottom of the sub-dialog are buttons for 'Define Child Ranges', 'Move Child Range', 'Status Codes', 'Find', 'OK', and 'Cancel'. The background of the main dialog shows a tree view of segments.

The screenshot shows the Segment Values dialog box with the following configuration:

- Segment Type:** Key Flexfield
- Title:** Item Categories
- Independent Segment:** Family
- Independent Value:** (empty)
- Structure:** Item Categories
- Dependent Segment:** (empty)
- Value Description:** (empty)

**Values (Family) :**

Value	Translated Value	Description	Enabled	From	To
MISC	MISC	Miscellaneous	<input checked="" type="checkbox"/>		
DEPI	DEPI	DEPI Sensors	<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

Buttons at the bottom:

- Define Child Ranges
- Move Child Ranges
- View Hierarchies

Validation status: Valid

Open button

The screenshot shows the 'Segment Values' dialog box with the 'Find Key Flexfield Segment' tab selected. The interface includes a left sidebar with navigation buttons for 'Value Set', 'Key Flexfield', 'Descriptive Flexfield', and 'Concurrent Program'. The main area displays the 'Find Key Flexfield Segment' configuration screen. It features a 'Find Values By' section with radio buttons for 'Value Set', 'Key Flexfield' (which is selected), 'Descriptive Flexfield', and 'Concurrent Program'. To the right, application-specific fields are shown: 'Application' (Inventory), 'Title' (Item Categories), 'Structure' (Item Categories), and 'Segment' (Class). Below these are fields for 'Independent Value', 'Value', and 'Description'. At the bottom are 'Clear' and 'Find' buttons, along with links for 'Define Child Ranges', 'Move Child Ranges', and 'View Hierarchies'.



Sense the Future

The screenshot shows the SAP Segment Values dialog box. The title bar says "Segment Values". There are four tabs at the top: "Value Set", "Key Flexfield" (which is selected), "Descriptive Flexfield", and "Concurrent Program". Below the tabs is a sub-tab "Find Key Flexfield Segment". On the left, there's a section titled "Find Values By" with radio buttons for "Value Set", "Key Flexfield" (selected), "Descriptive Flexfield", and "Concurrent Program". To the right, there are fields for "Application" (set to "Inventory"), "Title" (set to "Item Categories"), "Structure" (set to "Item Categories"), and "Segment" (set to "Class"). Below these are fields for "Independent Value" (set to "DEPI"), "Value" (with a dropdown menu), and "Description". At the bottom are "Clear" and "Find" buttons. At the very bottom are buttons for "Define Child Ranges", "Move Child Ranges", and "View Hierarchies".

The screenshot shows the SAP Segment Values dialog box. The 'Values, Effective' tab is selected. In the top section, there are four radio button options: 'Value Set' (selected), 'Key Flexfield', 'Descriptive Flexfield', and 'Concurrent Program'. Below these are two groups of input fields: 'Independent Segment' (Title: Item Categories, Value: Family) and 'Dependent Segment' (Structure: Item Categories, Value: Class). Under 'Independent Value' (Value: DEPI) and 'Value Description' (Value: DEPI Sensors), there is a 'Values (Class)' dropdown menu with a checked checkbox. The main table lists values with columns: Value, Translated Value, Description, and Enable. The table contains two rows: MISC (Translated Value: MISC, Description: Miscellaneous) and SENS (Translated Value: SENS, Description: OT Sensors). To the right of the table is a note icon with the message: 'Submitted request(s) to compile 2 value set hierarchies'. At the bottom are buttons for 'Define Child Ranges', 'Move Child Ranges', 'View Hierarchies', and 'OK'.

**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
8283757	General Ledger Accounting		Completed	Normal	SH, 1002824, N
8283756	General Ledger Accounting		Completed	Normal	SH, 1002685, N
8283755	Compile value set hierarchy		Completed	Normal	1002824
8283754	Compile value set hierarchy		Completed	Normal	1002685
8283551	Create Reporting Sequence		Completed	Normal	1, Dec-12, RESET
8283549	Open Period		Completed	Normal	Vision Operations, 1017, 1, 10
8283545	Create Reporting Sequence		Completed	Normal	1, Dec-12, ASSIGN
8283544	Periods - Close Period		Completed	Normal	Vision Operations, 1017, 1, Dec-13
8283535	Create Reporting Sequence		Completed	Normal	1, Dec-13, RESET
8283534	Open Period		Completed	Normal	Vision Operations, 1017, 1, 10

Held Request View Details Rerun Request View Output

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

Open

### Step 3:

- Set up –items –categories- category code –new
- Insert structure name, category (family, class)
- Ok then save

**Navigator - Inventory**

Functions Documents Processes

Setup:Items:Categories:Category Codes

Define Item Categories

+ Reports  
- Requests  
+ Transactions  
- Items  
    Templates  
    Attribute Controls  
    Catalog Groups  
- Categories  
    Category Sets  
    **Category Codes**  
    Default Category Sets  
    Category Accounts  
    Customer Item Commodity Codes  
    Item Types  
    Status Codes  
    Container Types  
    Delete Constraints

Top Ten List

1. Change Organization - MRP
2. Master Items
3. Templates
4. Organization Access
5. Receipts

Open



Sense the Future

The screenshot shows the SAP GUI interface for the Categories screen. The main window displays a table with columns: Structure Name, Category, Description, and Inactive On. A context menu is open over the first row, listing options like Category Codes, Default Category Sets, Category Accounts, Customer Item Commodity Codes, Item Types, Status Codes, Container Types, and Delete Constraints. A 'Supplier [1]' entry is highlighted in the 'Viewable by' list. A 'Find Categories' dialog box is overlaid on the main window, containing fields for Structure Name, Category, Description, and Inactive On, along with buttons for Clear, New, and Find.

The screenshot shows the SAP Fiori interface for managing categories. The main screen displays a table with columns: Structure Name, Category, Description, Enabled, Inactive On, and Viewable by Supplier. A row for 'Item Categories' is selected, highlighted with a yellow background. A context menu is open over this row, with the 'Category Codes' option being highlighted. The menu also includes other options like Default Category Sets, Category Accounts, Customer Item Commodity Codes, Item Types, Status Codes, Container Types, and Delete Constraints. Below the menu, there are buttons for OK, Cancel, Clear, and Help. A secondary dialog box titled 'Edit Categories' is visible, showing fields for Family and Class.



Sense the Future

The screenshot shows the SAP Fiori interface for managing categories. The main screen, titled 'Categories', displays a table with columns: Structure Name, Category, Description, Enabled, Inactive On, and Viewable by Supplier. A row for 'Item Categories' is selected, highlighted with a yellow background. A modal dialog box titled 'Item Categories' is open, showing the Family field set to 'DEPI' and the Class field set to 'SENS'. The dialog also contains buttons for OK, Cancel, Clear, and Help.

**Choices in list 2**

## Step 4:

- Set up –items –categories- category sets
  - Insert name and default category then save
  - Any item will enter the inventory will be assigned to the default category (DEPI SENS)

**Navigator - Inventory**

Functions Documents Processes

Setup Items: Categories: Category Sets

Define Category Sets

- + Reports
- Requests
- Setup
- + Transactions
- Items
  - Templates
  - Attribute Controls
  - Catalog Groups
  - Categories
    - Category Sets
    - Category Codes
    - Default Category Sets
    - Category Accounts
  - Customer Item Commodity Codes
  - Item Types
  - Status Codes
  - Container Types
  - Delete Constraints

**Top Ten List**

1. Change Organization - MRP
2. Master Items
3. Templates
4. Organization Access
5. Receipts

**Open**

**Category Sets**

Name: Inv.Items

Description: Inventory Category Set

Flex Structure: Item Categories

Controlled At: Org Level

Default Category: DEPI.SENS

Allow Multiple Item Category Assignments

Enforce List of Valid Categories

Category
070.51
070.54
070.55
204.61
204.62
204.63
280.00

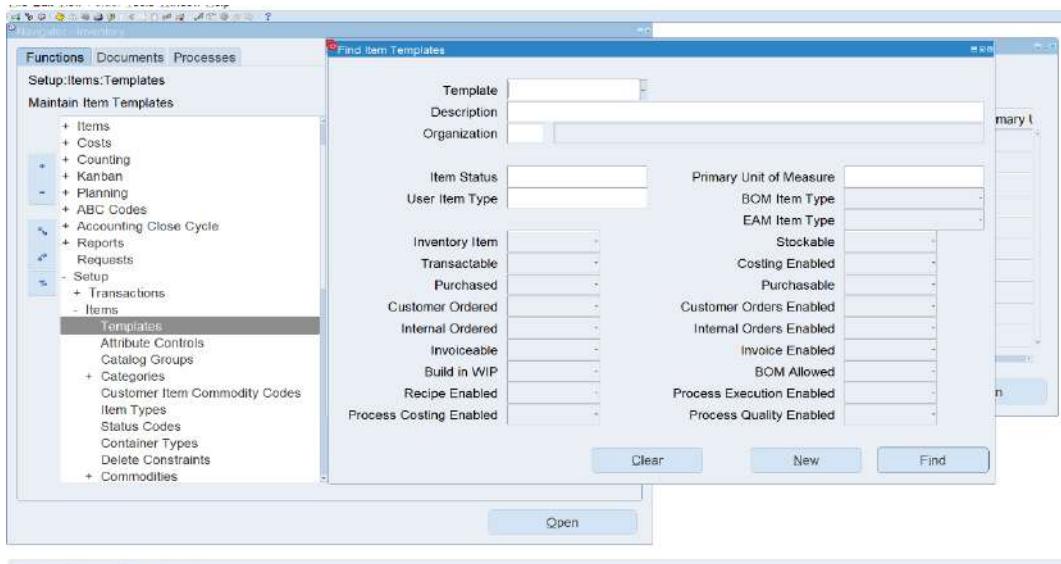
**Category People**      **Assign**

**Open**

### 3. (Template)

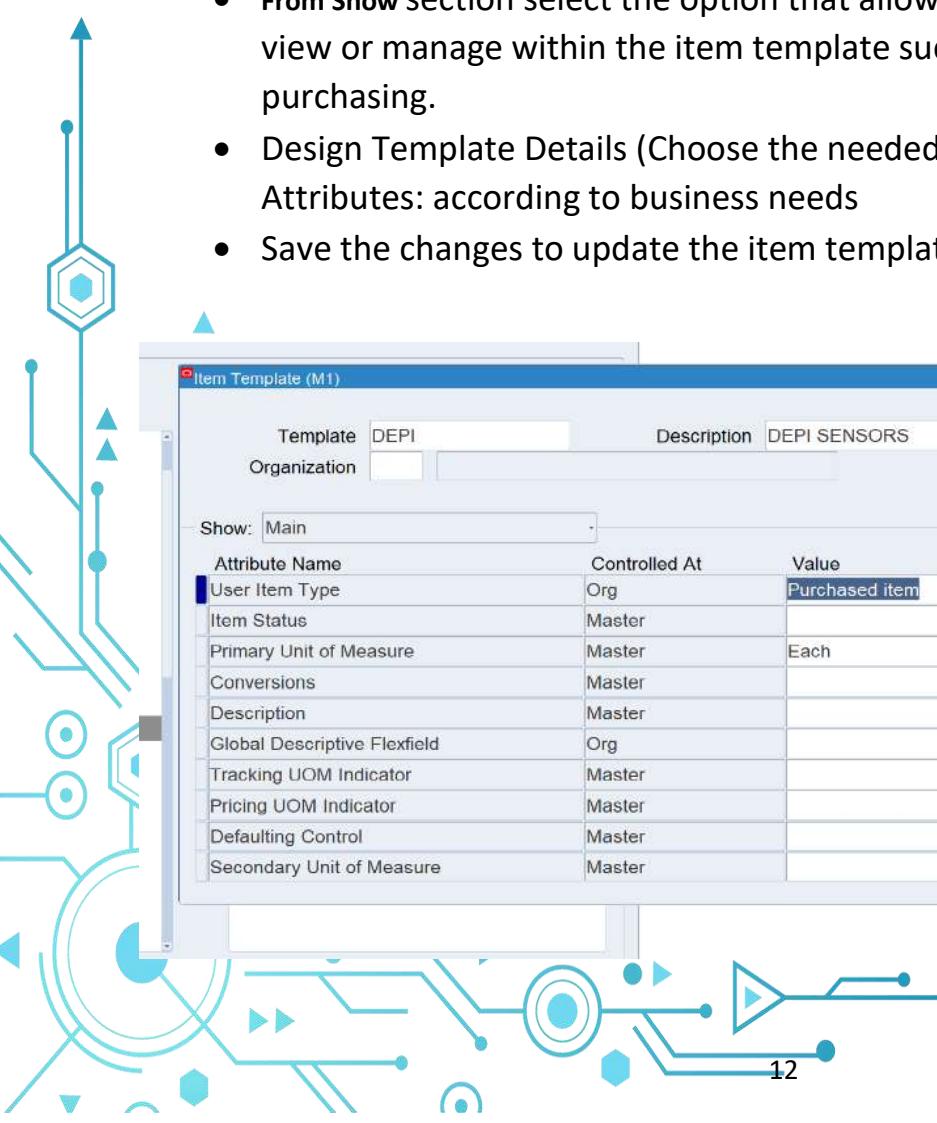
#### Step 1: create new template:

- Navigate to inventory -> set up -> Item ->Templates
- Click New tab



#### Step2: Design template details:

- Insert template name and description
- From Show section select the option that allows to specify which attributes to view or manage within the item template such as: all groups, inventory, main, purchasing.
- Design Template Details (Choose the needed attributes, Enable/Disable Attributes: according to business needs)
- Save the changes to update the item template.



**Item Template (M1)**

Template	Description		
DEPI	DEPI SENSORS		
Organization			
Show: Main			
Attribute Name	Controlled At	Value	Enabled
User Item Type	Org	Purchased item	<input checked="" type="checkbox"/>
Item Status	Master		<input type="checkbox"/>
Primary Unit of Measure	Master	Each	<input type="checkbox"/>
Conversions	Master		<input type="checkbox"/>
Description	Master		<input type="checkbox"/>
Global Descriptive Flexfield	Org		<input type="checkbox"/>
Tracking UOM Indicator	Master		<input type="checkbox"/>
Pricing UOM Indicator	Master		<input type="checkbox"/>
Defaulting Control	Master		<input type="checkbox"/>
Secondary Unit of Measure	Master		<input type="checkbox"/>

**Item Template (M1)**

Template	DEPI	Description	DEPI SENSORS
Organization		[ ]	
Show: All Groups			
Attribute Name	Controlled At	Value	Enabled
User Item Type	Org	Purchased item	<input checked="" type="checkbox"/>
Item Status	Master		<input type="checkbox"/>
Primary Unit of Measure	Master	Each	<input checked="" type="checkbox"/>
Conversions	Master		<input type="checkbox"/>
Description	Master		<input type="checkbox"/>
Global Descriptive Flexfield	Org		<input type="checkbox"/>
Tracking UOM Indicator	Master		<input type="checkbox"/>
Pricing UOM Indicator	Master		<input type="checkbox"/>
Defaulting Control	Master		<input type="checkbox"/>
Secondary Unit of Measure	Master		<input type="checkbox"/>

**Item Template (M1)**

Template	DEPI	Description	DEPI SENSORS
Organization		[ ]	
Show: Inventory			
Attribute Name	Controlled At	Value	Enabled
Inventory Item	Master	Yes	<input checked="" type="checkbox"/>
Stockable	Master	Yes	<input checked="" type="checkbox"/>
Transactable	Master	Yes	<input checked="" type="checkbox"/>
Revision Control	Org		<input type="checkbox"/>
Lot Control	Org		<input type="checkbox"/>
Starting Lot Number	Org		<input type="checkbox"/>
Starting Lot Prefix	Org		<input type="checkbox"/>
Serial Number Generation	Org		<input type="checkbox"/>
Starting Serial Number	Org		<input type="checkbox"/>
Starting Serial Prefix	Org		<input type="checkbox"/>

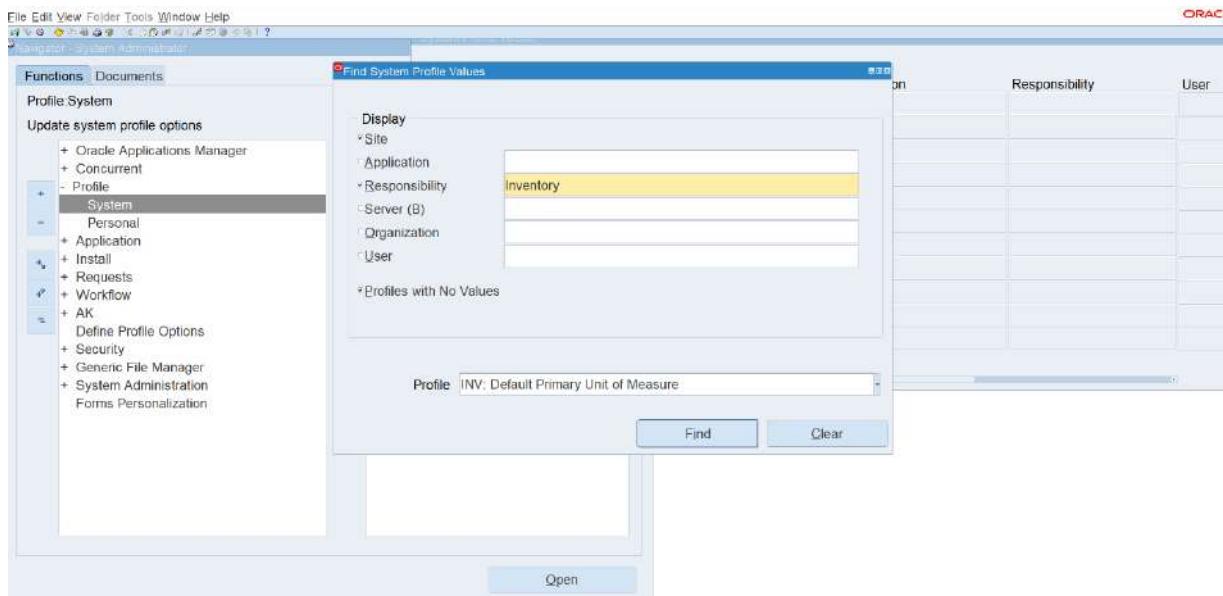
**Item Template (M1)**

Template	DEPI	Description	DEPI SENSORS
Organization		[ ]	
Show: Purchasing			
Attribute Name	Controlled At	Value	Enabled
Purchased	Master	Yes	<input checked="" type="checkbox"/>
Purchasable	Master	Yes	<input checked="" type="checkbox"/>
Default Buyer	Org		<input type="checkbox"/>
Use Approved Supplier	Org		<input type="checkbox"/>
Input Tax Classification Code	Org		<input type="checkbox"/>
Taxable	Org		<input type="checkbox"/>
Receipt Close Tolerance	Org		<input type="checkbox"/>
Allow Description Update	Org		<input type="checkbox"/>
Inspection Required	Org		<input type="checkbox"/>
Receipt Required	Org		<input type="checkbox"/>

## 4. Unit of measure

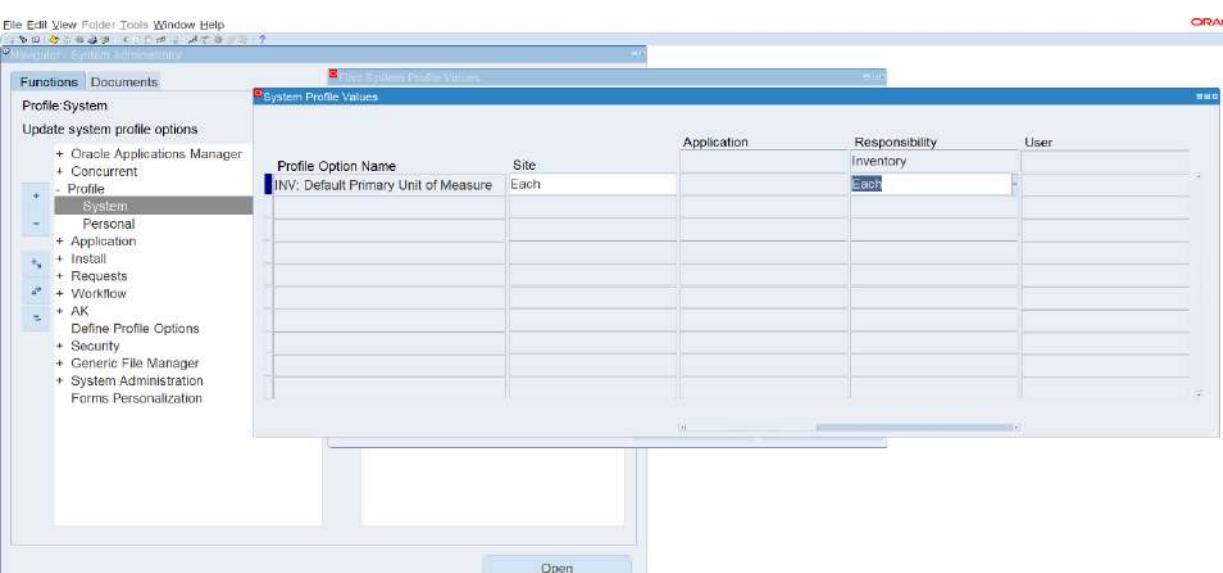
### Step 1: Accessing the Profile System Options

- In the system administration Responsibility-> Profile -> system.
- From "Find System Profile Values" window insert In Application Field "Inventory", and "Default Primary Unit of Measure" in profile field then clicks the "Find" button.



### Step2: indicates the default unit of measure set for inventory items.

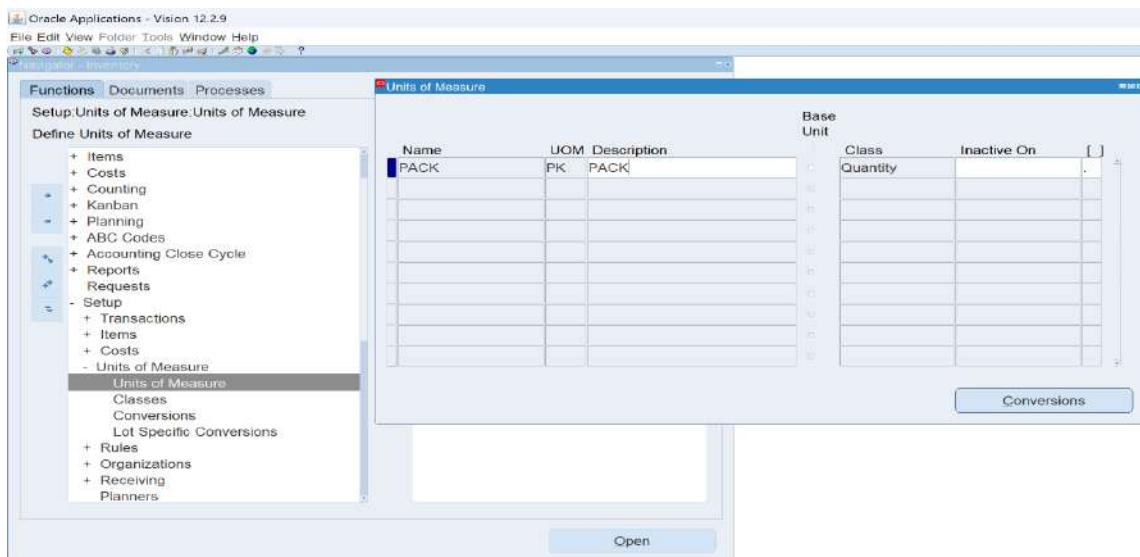
- On the Responsibility level select "Each" then click save



## 5. Units of Measure conversions

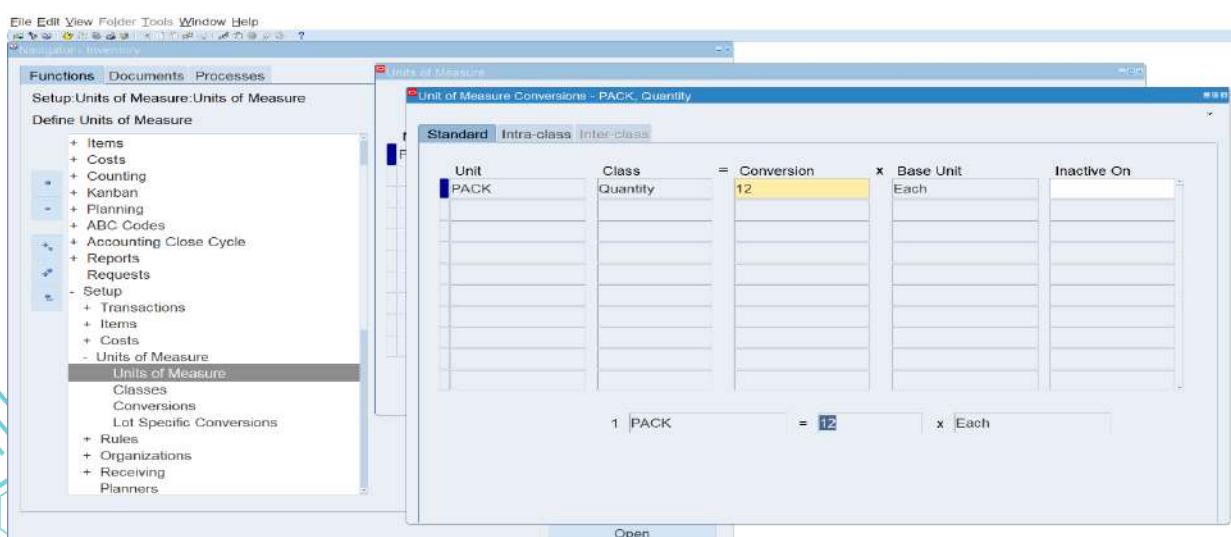
### Step 1: Access the Units of Measure window:

- Navigate to inventory responsibility -> set up -> units of measure
- Units of measure Window displays the (default unit of measure, Name, Description, Base unit, etc.)
- Click on conversion tap



### Step 2: Set Up Unit of Measure Conversions:

- Enter Conversion Details: (e.g., entering '12' to indicate that 12 Each equal 1 PACKs).
- Then click Save



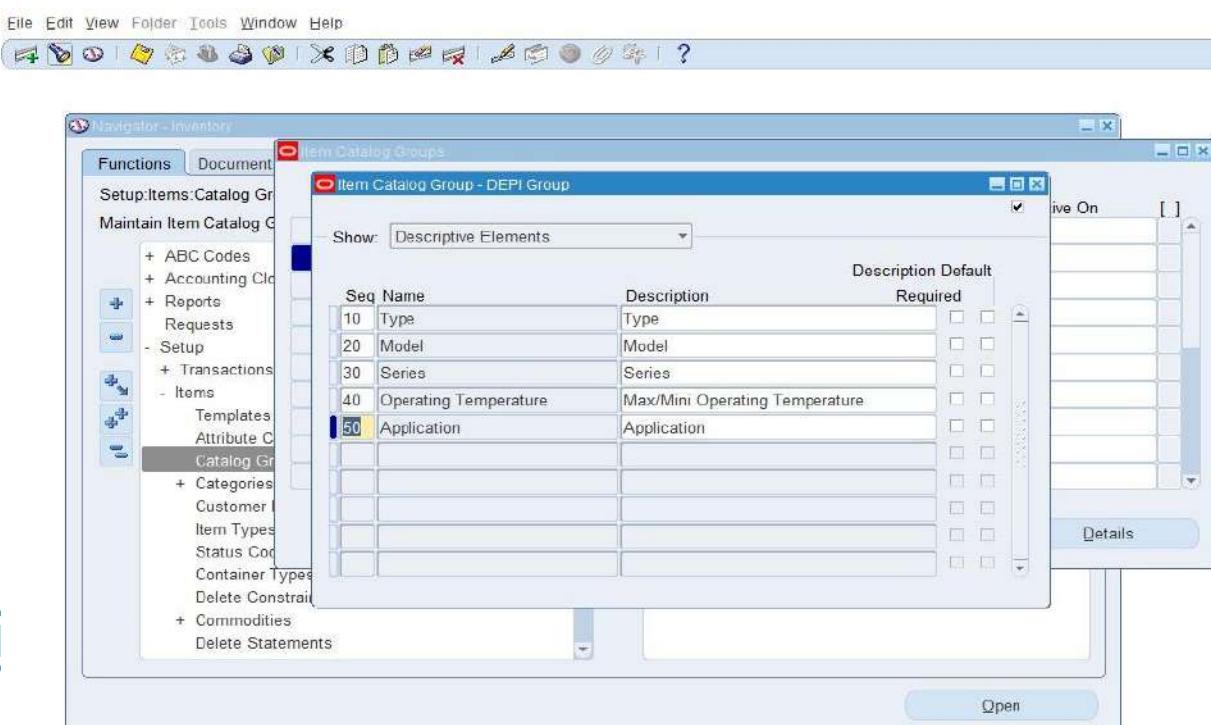
## 6. Catalog

### Step 1: Accessing the Catalog Group Setup

- In the Inventory Responsibility -> set up -> item -> catalog group.
- In the Catalog Group window, click new
- Insert catalog name "DEPI Group" In name field, Insert the Description Then click Details

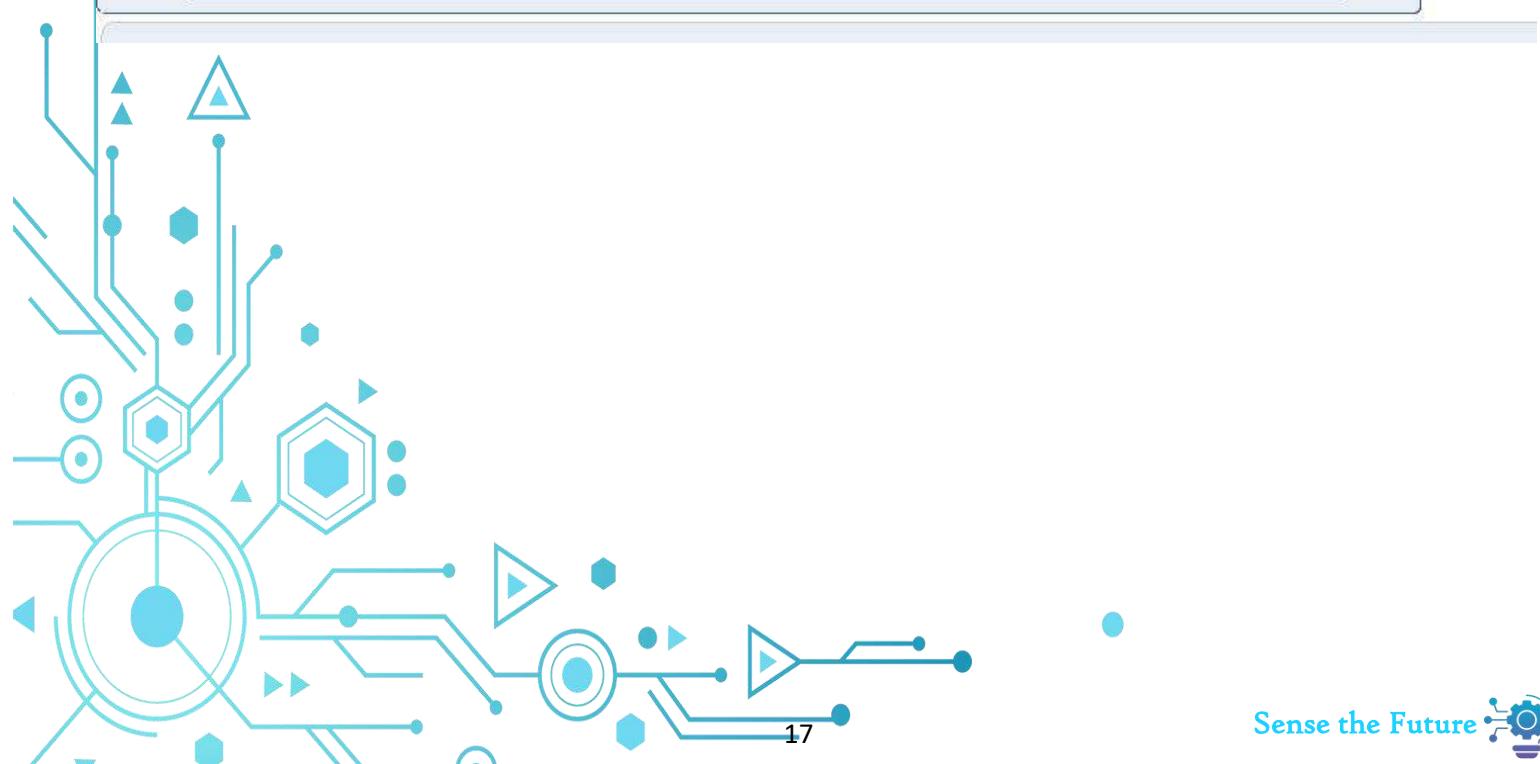
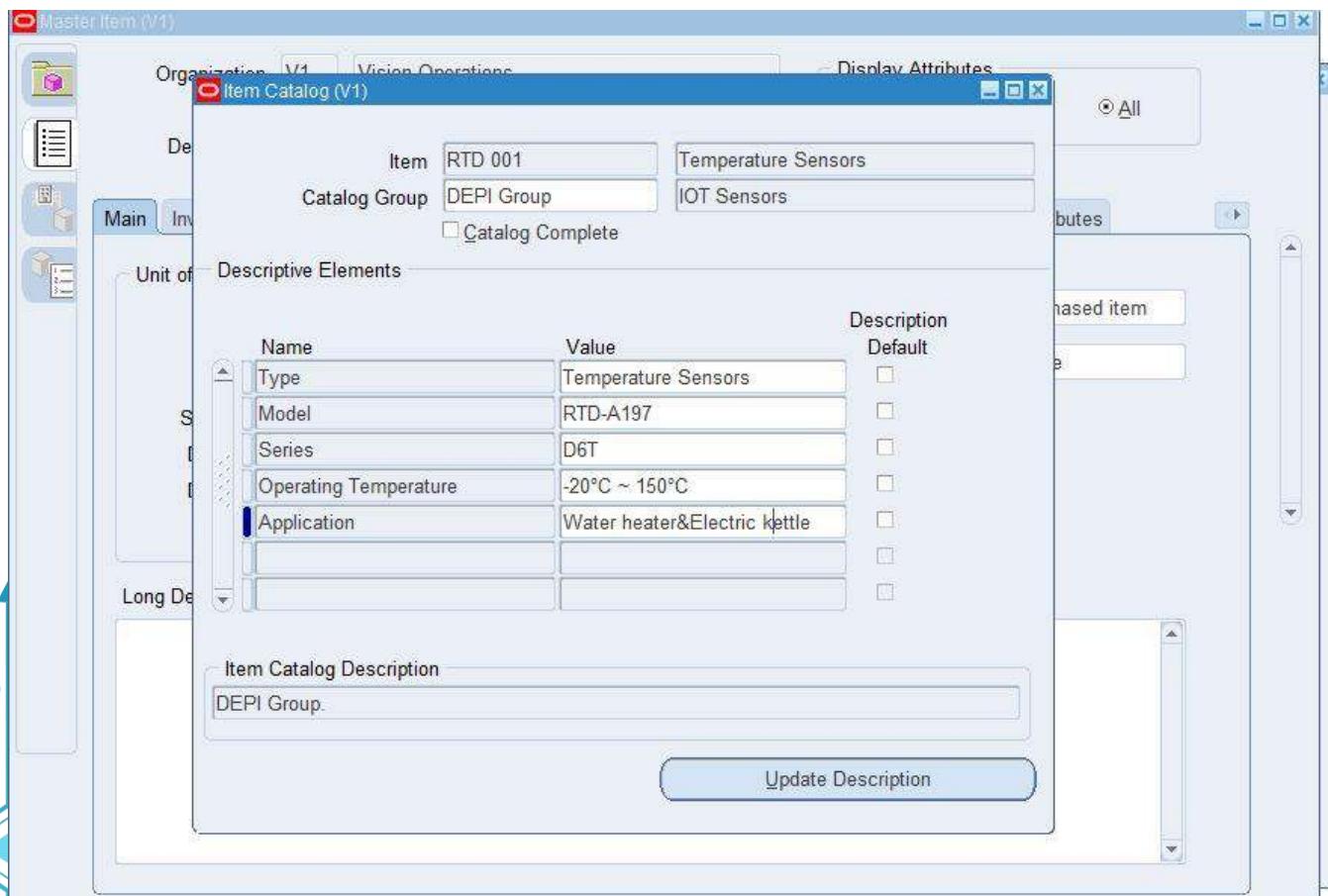
### Step 2: create the group descriptive elements.

- A window will appear insert catalog details: (name, description)
- Name: Represents the type of descriptive element (e.g., Model, Series).
- Description: Provides additional details about each element (e.g., Maximum Operating Temperature).
- Finally click save.



### Step 3: Updating Item Information

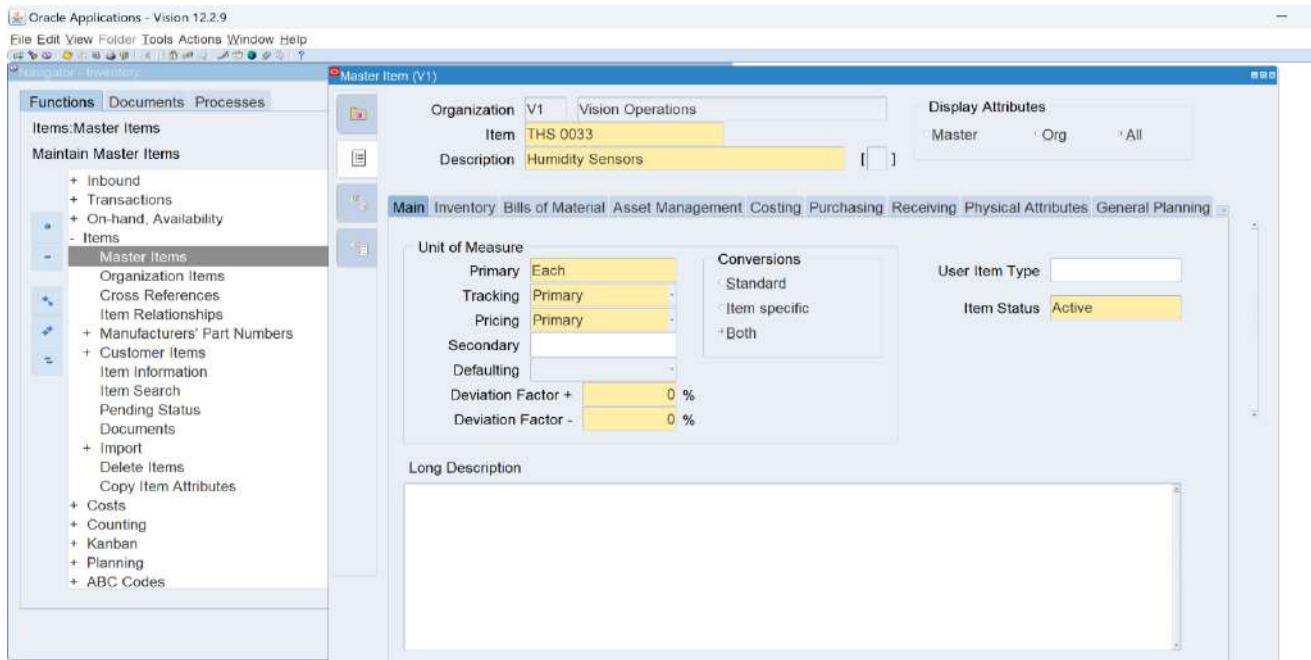
- Navigate to "Master item" then choose the master organization "v1"
- and the item "RTD 001".
- From tools choose catalog
- Enter the catalog name "DEPI Group" click ok
- Define Descriptive Elements values such as: (Type: Temperature Sensors) etc.
- Click Update Description to save the item information and descriptive elements.



## 7. New item

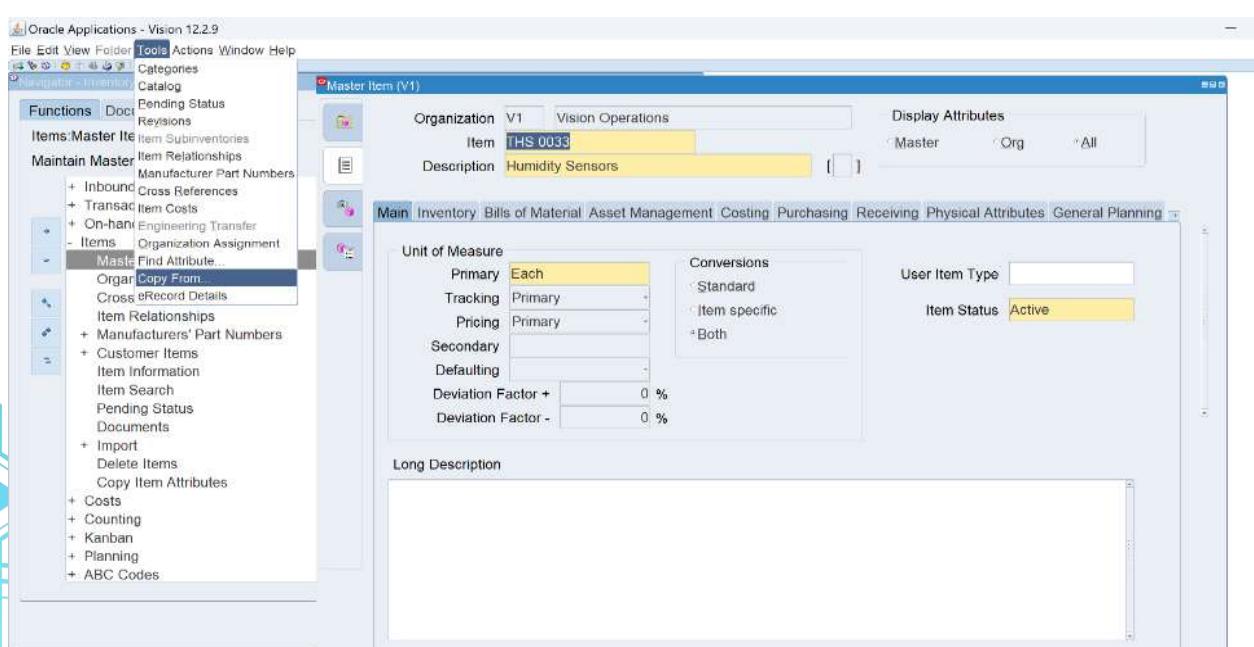
### Step 1: Accessing the Item Master and Initial Setup

- Navigates to the Inventory responsibility -> items ->'Master Items'.
- Select the organization to which this item will belong (Vision Operations).
- Enter a unique item name. "TH5 0033"
- Description: summarized info about the item "Humidity Sensors"
- Descriptive flexfield [ ]: Mapping new items to old items



### Step 2: Assign a specific template:

- From tools tab: copy from: choose the template then apply "DEPI"
- Click save, the statuses turn into active



Item (V1)

Organization	V1 Vision Operations	Display Attributes
Item	THS 0033	<input type="radio"/> Master <input type="radio"/> Org <input type="radio"/> All
Description	Humidity Sensors	

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

Unit of Measure      Conversions

Primary **Copy From**

Template DEPI      Item DEPI SENSORS

Clear Cancel Apply Done

### Step 3: Assign the item to the inventory org where the item be available for transactions (M1, M2, M3)

- Click on the assigned check box
- Click org attribute: to ensure that all the item attributes are assigned to the inventory org, or make updates if needed

File Edit View Folder Tools Actions Window Help

Master Item (V1)

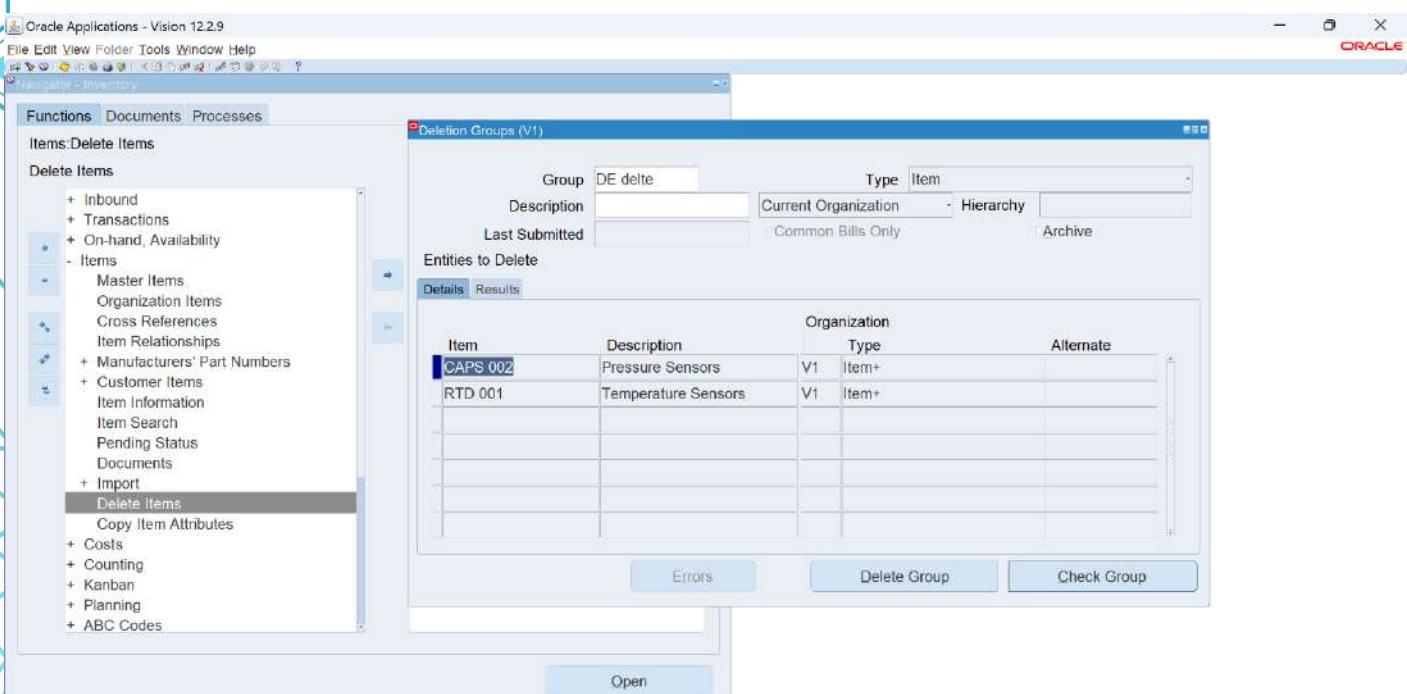
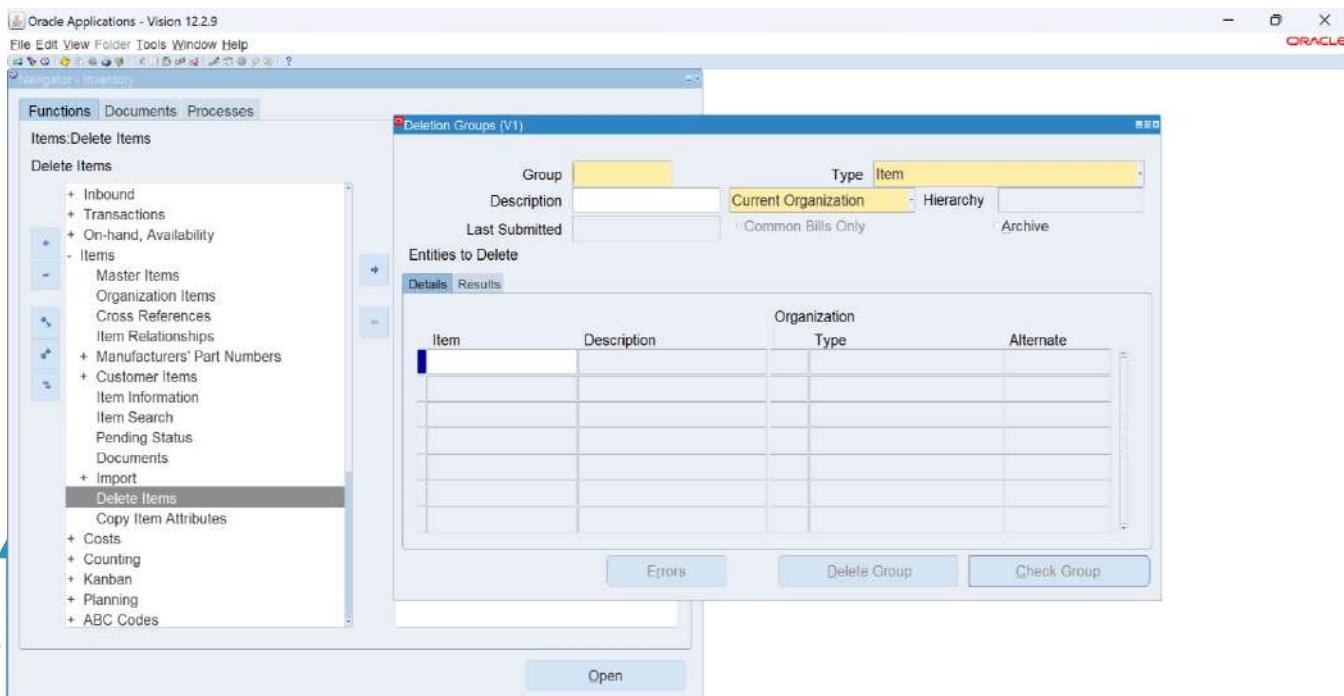
Org	Name	Primary	Tracking	Pricing	Assigned
V1	Vision Operations	Each	Primary	Primary	<input checked="" type="checkbox"/>
M1	Seattle Manufacturing	Each	Primary	Primary	<input checked="" type="checkbox"/>
M2	Boston Manufacturing	Each	Primary	Primary	<input checked="" type="checkbox"/>
M3	Dallas Manufacturing	Each	Primary	Primary	<input checked="" type="checkbox"/>
AU	Vision Australia	Each	Primary	Primary	<input checked="" type="checkbox"/>
B1	Northwest Electronic Supply	Each	Primary	Primary	<input checked="" type="checkbox"/>
B2	Discount SuperStore-Atlanta	Each	Primary	Primary	<input checked="" type="checkbox"/>
CD	Central Depot	Each	Primary	Primary	<input checked="" type="checkbox"/>
CH	Vision Switzerland	Each	Primary	Primary	<input checked="" type="checkbox"/>
CO1	Vision Columbia	Each	Primary	Primary	<input checked="" type="checkbox"/>
CWH	Central Warehouse - Field Serv	Each	Primary	Primary	<input checked="" type="checkbox"/>
CZ	Vision Czech	Each	Primary	Primary	<input checked="" type="checkbox"/>
D1	Singapore Distribution Center	Each	Primary	Primary	<input checked="" type="checkbox"/>

Org Attributes      Unassign All      Assign All

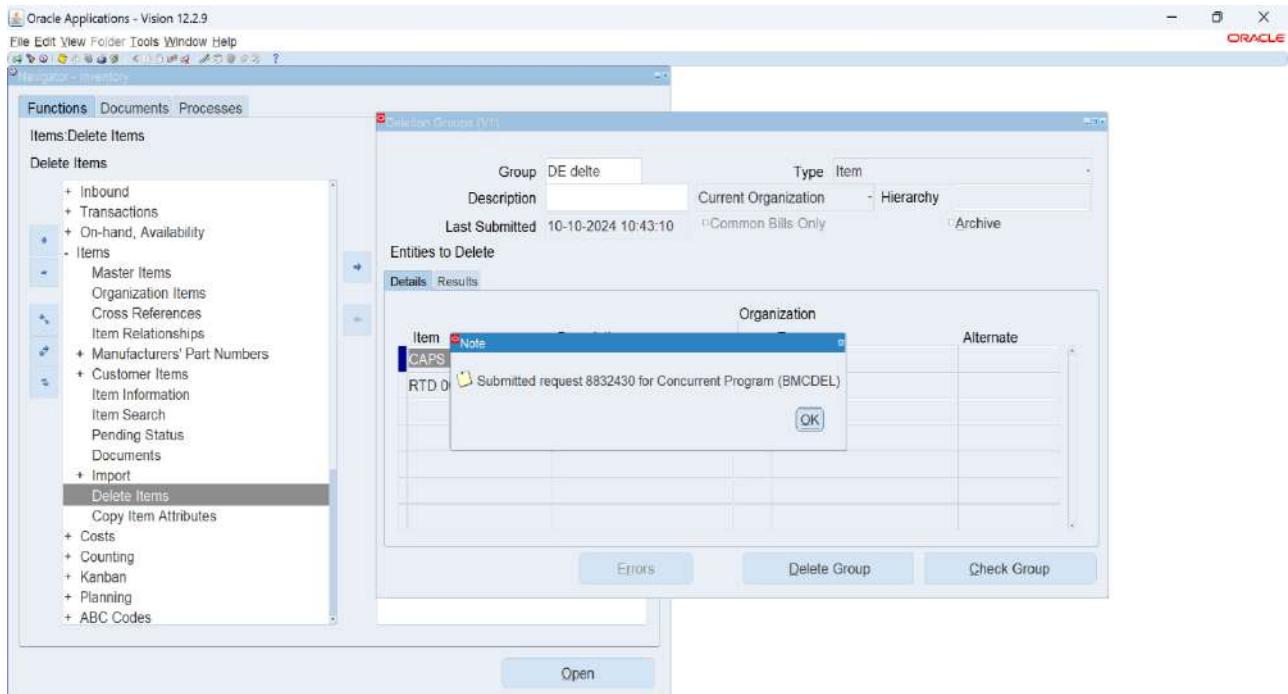
## 8. Delete Item

### Step 1: Create Deletion Groups

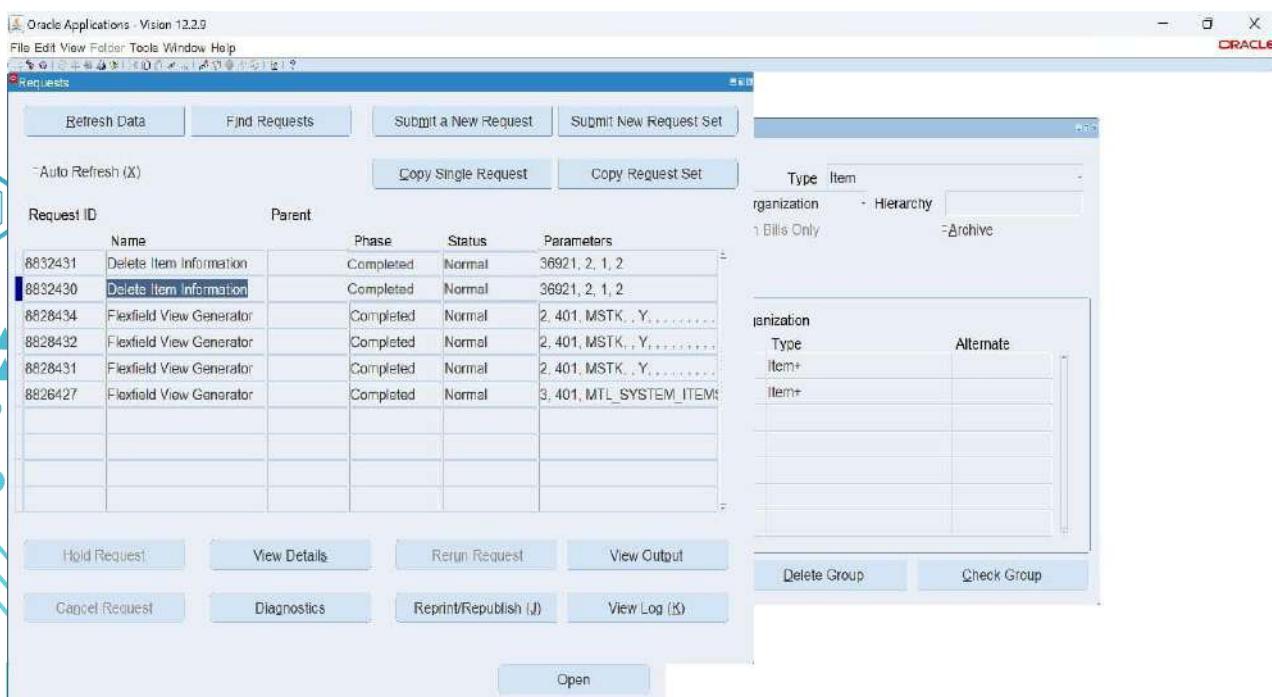
- Navigate to inventory responsibility -> item -> delete items.
- In the Deletion Groups window: insert group name (DE delete) , Select from where you want to delete the item: current organization (V1), all organizations or organization hierarchy
- Insert the items to be deleted RTD 001/CAPS 002
- Ps: the items must be not used to be validated
- Click save, then Delete Group



## Step 2: Deletion Request Automatically submitted (8832430): to check the deletion process



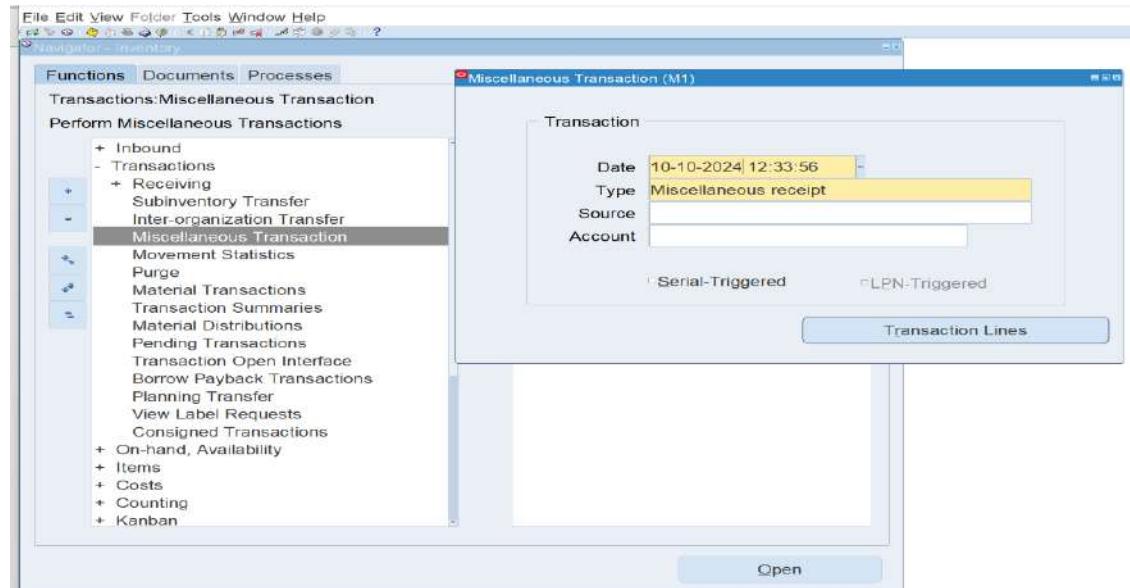
## Step 3: From view: requests monitor the request stats to ensure it is completed normal



## 9. Miscellaneous Receipt

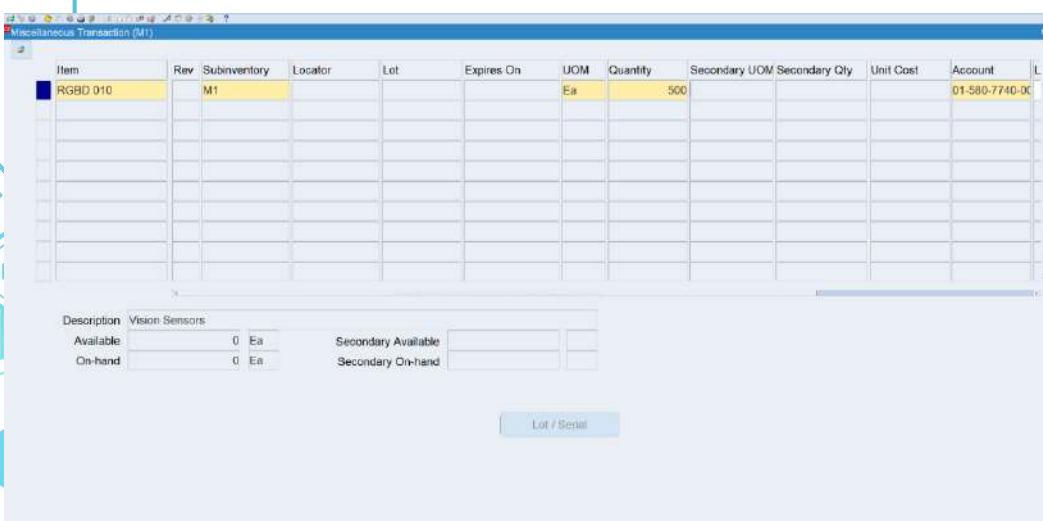
### Step 1: Initiating a Miscellaneous Receipt (Screenshot 1)

- Navigate to inventory: transactions: Miscellaneous Transactions.
- Enter Transaction Details: (date, type, account)
- Click on Transaction Lines to proceed.



### Step 2: Entering Transaction Line Details (Screenshot 2)

- Click Transaction Lines, a new window opens where you can enter specific item details.
- Fill in Item Information: such as (Item, Sub inventory, UOM, Quantity, etc)
- The details section shows information about the item, including:
  - Available: This refers to the quantity of inventory that is currently available for sale or use, excluding any items that are reserved, allocated, or in transit.
  - On-hand: this represents the total quantity of inventory that is physically present in stock, regardless of its status (available for sale, reserved, or on order).
- Confirm the transaction by saving.



Item	Rev	Subinventory	Locator	Lot	Expires On	UOM	Quantity	Secondary UOM	Secondary Qty	Unit Cost	Account
RGBD 010		M1				Ea	500			01-580-7740-00	

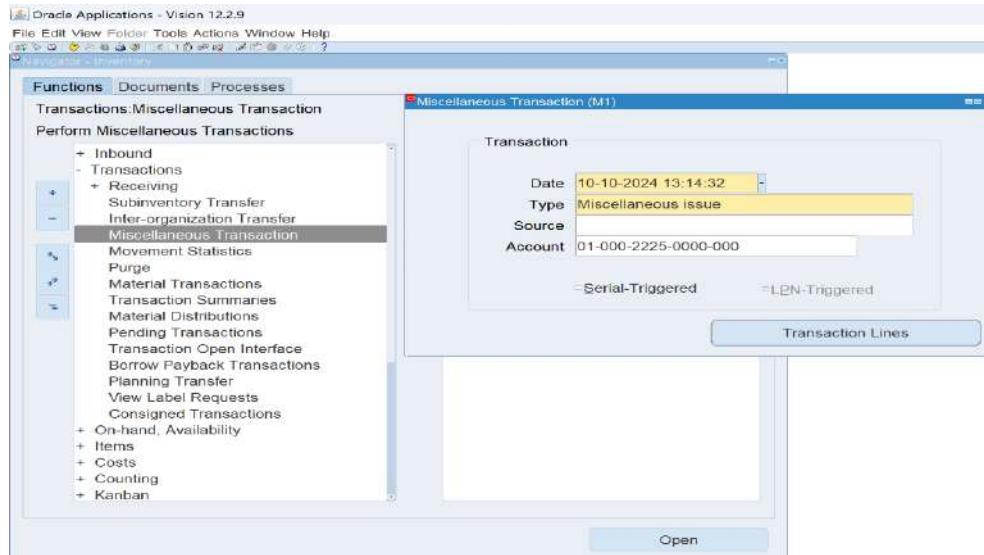
Description: Vision Sensors  
Available: 0 Ea  
On-hand: 0 Ea  
Secondary Available  
Secondary On-hand

Lot / Serial

## 10. Miscellaneous Issue

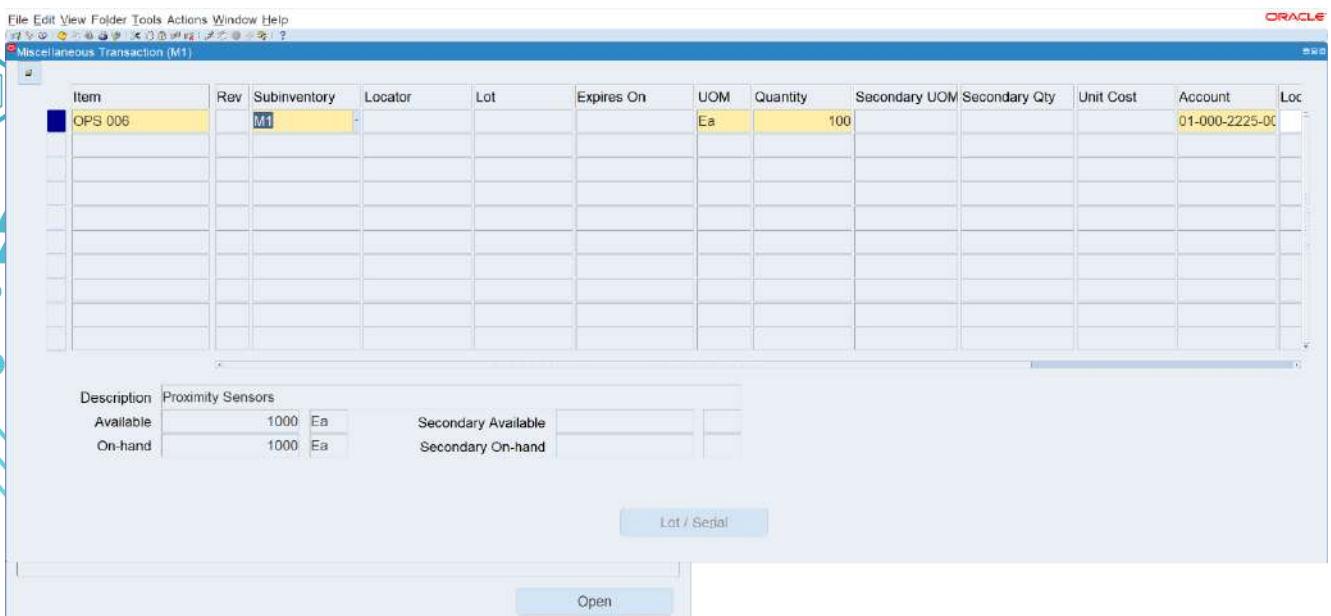
### Step 1: Navigate to inventory -> transactions -> Miscellaneous Transactions.

- Enter Transaction Details: (date, type, account)
- Click on Transaction Lines to proceed.



### Step 2: Entering Transaction Line Details

- Click Transaction Lines, a new window opens where you can enter specific item details.
- Fill in Item Information such as (item, sub inventory, quantity, etc.)
- Review Item Availability: (available, on hand)
- Confirm the transaction by saving



Item	Rev	Subinventory	Locator	Lot	Expires On	UOM	Quantity	Secondary UOM	Secondary Qty	Unit Cost	Account	Loc
OPS 006		M1				Ea	100				01-000-2225-00	

Description: Proximity Sensors  
 Available: 1000 Ea  
 On-hand: 1000 Ea

Lot / Serial

Open

ORACLE

### Step 3: querying the transaction (screenshot 3)

- Open Material Transactions window, it displays transaction details such as: (Source Type, Transaction Action, etc.) (Transaction, primary) Quantity: appears negative means withdrawing from inventory (miscellaneous issue)

The screenshot shows the Oracle Material Transactions (M1) window. The transaction details are as follows:

Item	Source Type	Source	Transaction Type	Transaction Action	Transaction UOM	Transaction Quantity	Transaction ID
OPS 006	Inventory		Miscellaneous issue	Issue from stores	Ea	-100	26317161

Below the table, there are fields for Item Description (Proximity Sensors), Date (10-10-2011 18:59:41), Primary UOM (Ea), Primary Quantity (-100), Secondary UOM, and Secondary Quantity. Buttons for Distributions and Lot / Serial are also present.

## 11. Account Receipt

### Step 1: Initiating account Receipt

- Navigate to inventory -> transactions -> account Transactions.
- In the Miscellaneous Transaction (M1) window, you will see fields for entering transaction details.
- Enter Transaction Details: (date, type, source, account)
- Source: mandatory because the transaction related to specific cost center.
- Click on Transaction Lines to proceed.

The screenshot shows the Oracle Applications - Vision 12.2.9 interface. The left sidebar navigation includes: Navigator - Inventory, Functions, Documents, Processes, Transactions:Miscellaneous Transaction, Perform Miscellaneous Transactions, Inbound, Transactions, Receiving, Subinventory Transfer, Inter-organization Transfer, Miscellaneous Transaction (highlighted), Movement Statistics, Purge, Material Transactions, Transaction Summaries, Material Distributions, Pending Transactions, Transaction Open Interface, Borrow Payback Transactions, Planning Transfer, View Label Requests, Consigned Transactions, On-hand, Availability, Items, Costs, Counting, and Kanban.

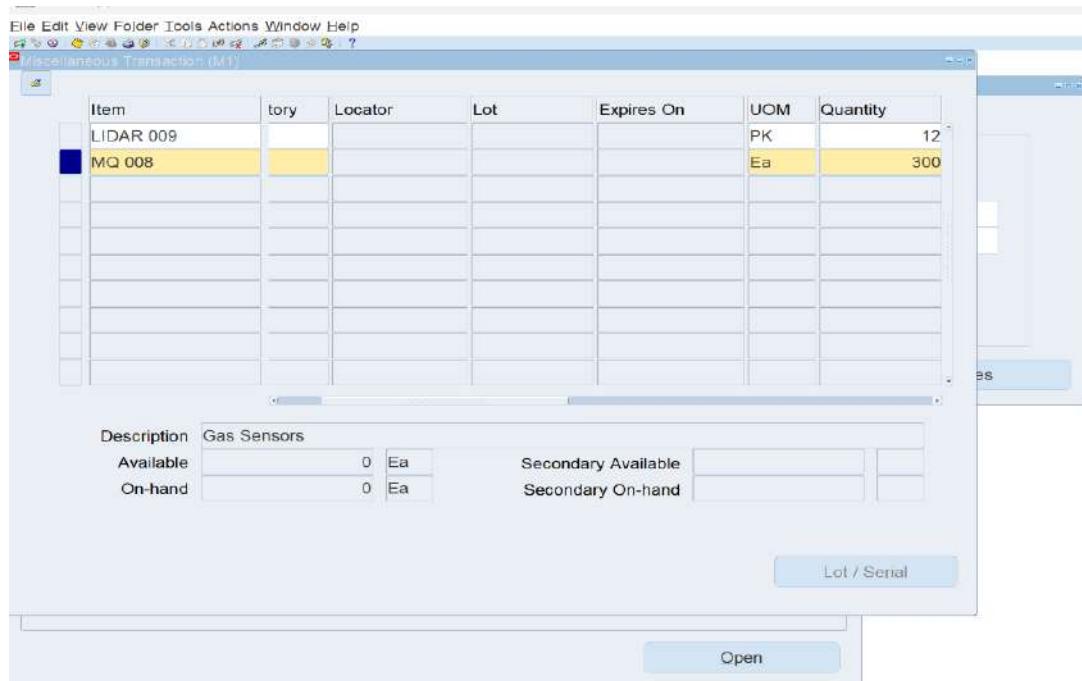
The main window is titled "Miscellaneous Transaction (M1)". It displays the following transaction details:

Date	10-10-2024 14:56:01
Type	Account receipt
Source	01-000-2225-0000-000
Account	01-000-2225-0000-000

Below the details, there are buttons for Serial-Triggered and LPN-Triggered, and a "Transaction Lines" button.

## Step 2: Entering Transaction Line Details (screenshot 2)

- Click Transaction Lines, a new window opens where you can enter specific items details.
- Fill in Items Information



The screenshot shows the Oracle EPM Miscellaneous Transaction (M1) window. The main grid displays two rows of item information:

Item	Category	Locator	Lot	Expires On	UOM	Quantity
LIDAR 009					PK	12
MQ 008					Ea	300

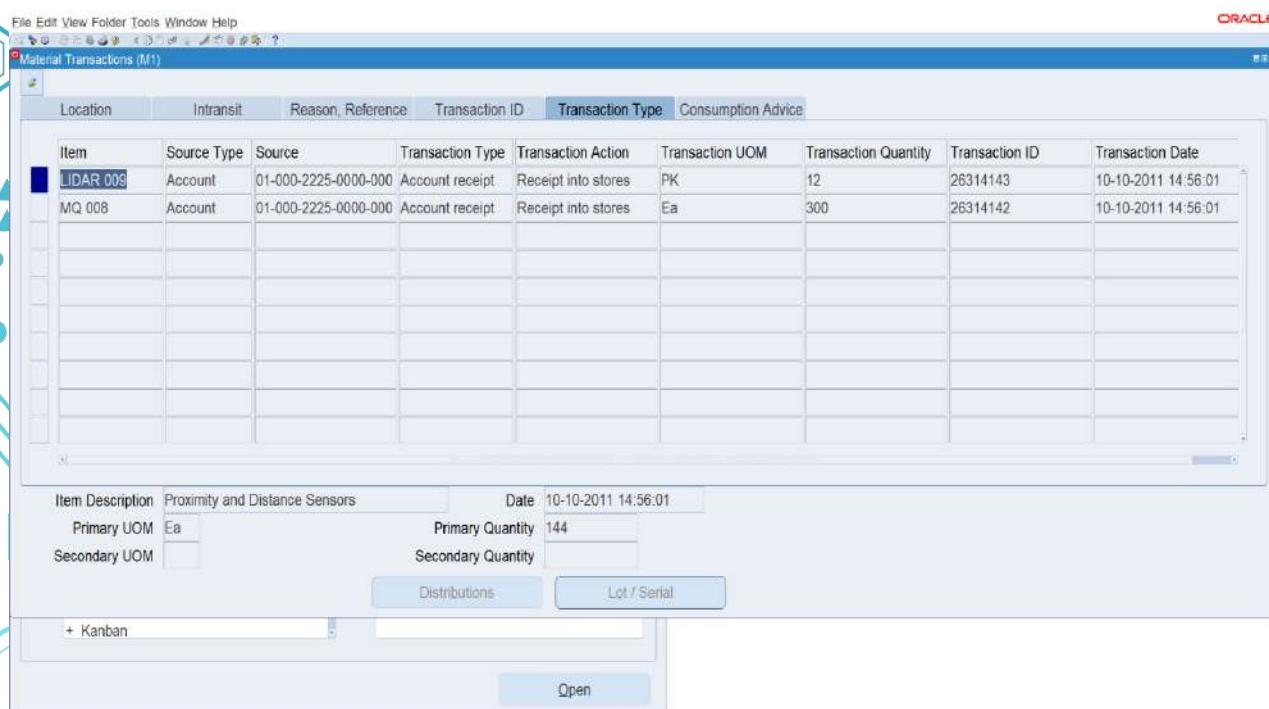
Below the grid, there is a detailed view for item MQ 008:

Description	Gas Sensors	
Available	0	Ea
On-hand	0	Ea
Secondary Available		
Secondary On-hand		

Buttons at the bottom include "Lot / Serial" and "Open".

## Step 3: Access Material Transactions to display transactions details

- Navigate to inventory: transactions: Material Transactions.
- Find Material Transactions screen is displayed, search for the items then click find tab
- Material Transactions window appears including transactions details



The screenshot shows the Oracle EPM Material Transactions (M1) window. The main grid displays a list of transactions:

Location	Intransit	Reason, Reference	Transaction ID	Transaction Type	Consumption Advice				
LIDAR 009		Account	01-000-2225-0000-000	Account receipt	Receipt into stores	PK	12	26314143	10-10-2011 14:56:01
MQ 008		Account	01-000-2225-0000-000	Account receipt	Receipt into stores	Ea	300	26314142	10-10-2011 14:56:01

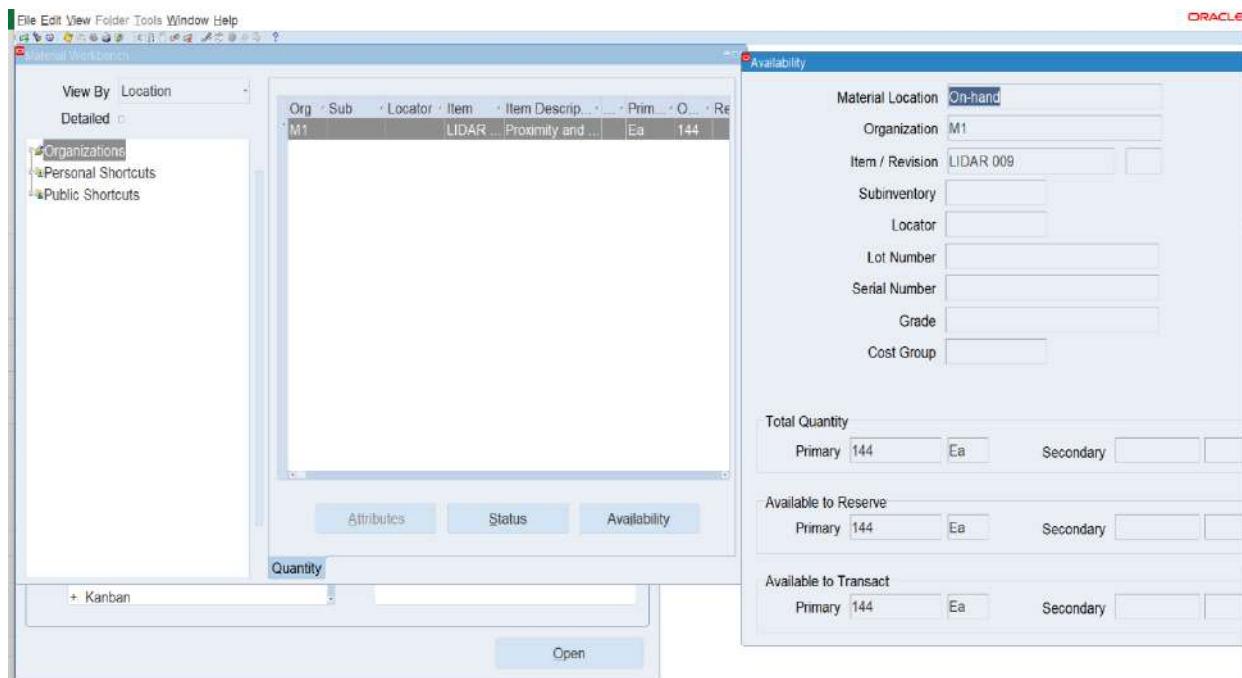
Below the grid, there is a detailed view for item MQ 008:

Item Description	Proximity and Distance Sensors	Date	10-10-2011 14:56:01
Primary UOM	Ea	Primary Quantity	144
Secondary UOM		Secondary Quantity	

Buttons at the bottom include "Distributions", "Lot / Serial", "+ Kanban", and "Open".

## Step 4: Check on hand quantity

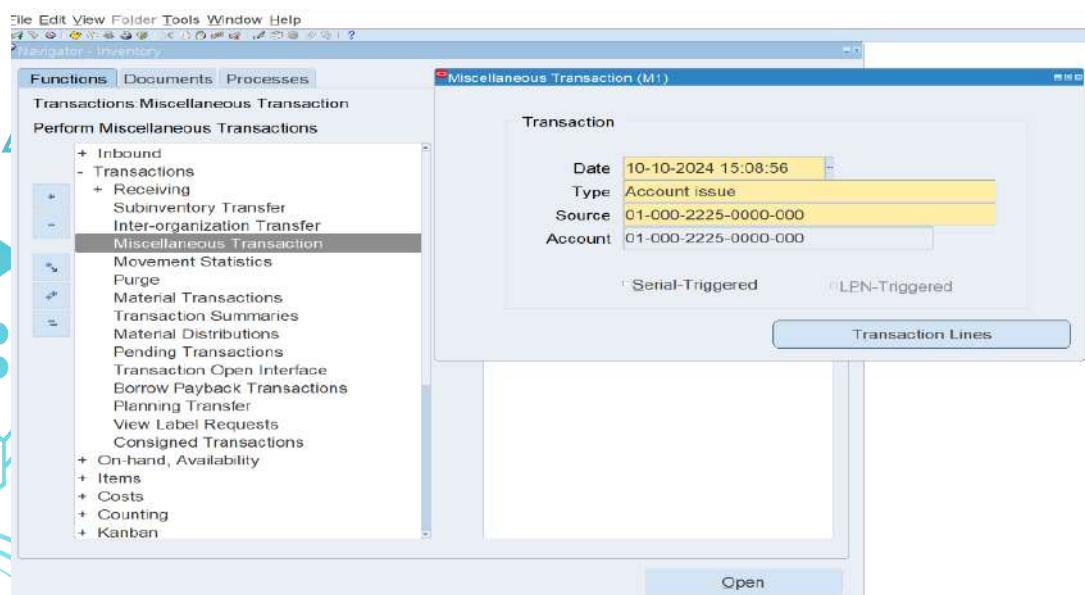
- Move to the material work bench, click availability tab.
- A detailed information about the item's availability: (Total Quantity, Available to Reserve/transact)



## 12. Account Issue

### Step 1: Initiating account issue

- Navigate to inventory -> transactions -> miscellaneous Transactions.
- Enter Transaction Details: (date, type, source, account)
- Click on Transaction Lines to proceed:



## Step 2: Entering Transaction Line Details

- Click Transaction Lines, a new window opens where you can enter specific items details.
- Fill in Items Information such as: RGBD 010: 180 units (Each)

File Edit View Folder Tools Actions Window Help

Miscellaneous Transaction (M1)

Item	Rev	Subinventory	Locator	Lot	Expires On	UOM	Quantity	Secondary UOM/Sec
RGBD 010		M1				Ea	180	
LIDAR 009		M1				PK	5	
MQ 008		M1				Ea	200	

Description Gas Sensors

Available	300	Ea	Secondary Available		
On-hand	300	Ea	Secondary On-hand		

**Lot / Serial**

**Open**

## Step 3: Review The Transaction

- Navigate to inventory: transactions: Material Transactions.
- Transaction IDs for each item, confirming that the transactions have been processed.

File Edit View Folder Tools Window Help

Material Transactions (M1)

ORACLE

Location	Intransit	Reason, Reference	Transaction ID	Transaction Type	Consumption Advice					
Item	Source Type	Source	Transaction ID	Transaction Type	Transaction Action	Transaction UOM	Transaction Quantity	Transaction ID	Transaction Date	[ ]
RGBD 010	Account	01-000-2225-0000-000	26315145	Account issue	Issue from stores	Ea	-180	26315145	10-10-2011 15:08:56	
LIDAR 009	Account	01-000-2225-0000-000	26315144	Account issue	Issue from stores	PK	-5	26315144	10-10-2011 15:08:56	
MQ 008	Account	01-000-2225-0000-000	26315143	Account issue	Issue from stores	Ea	-200	26315143	10-10-2011 15:08:56	

Item Description Gas Sensors

Date 10-10-2011 15:08:56

Primary UOM Ea Primary Quantity -200

Secondary UOM Secondary Quantity

**Distributions** **Lot / Serial**

+ Kanban

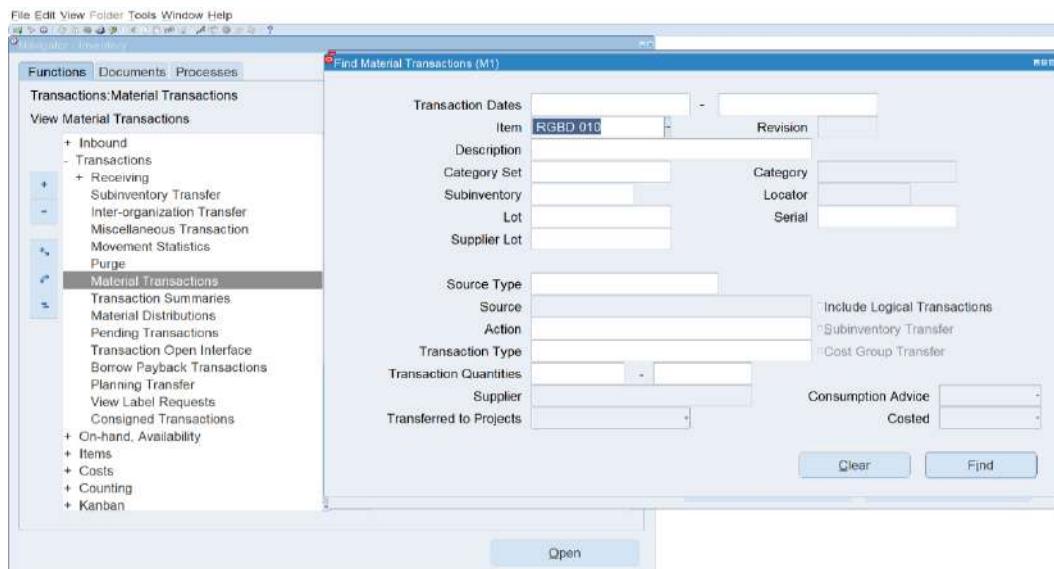
**Open**

## 13. Material Transactions

"Material Transactions focusing on recording and querying material movements, this screen allows users to review and manage miscellaneous transactions"

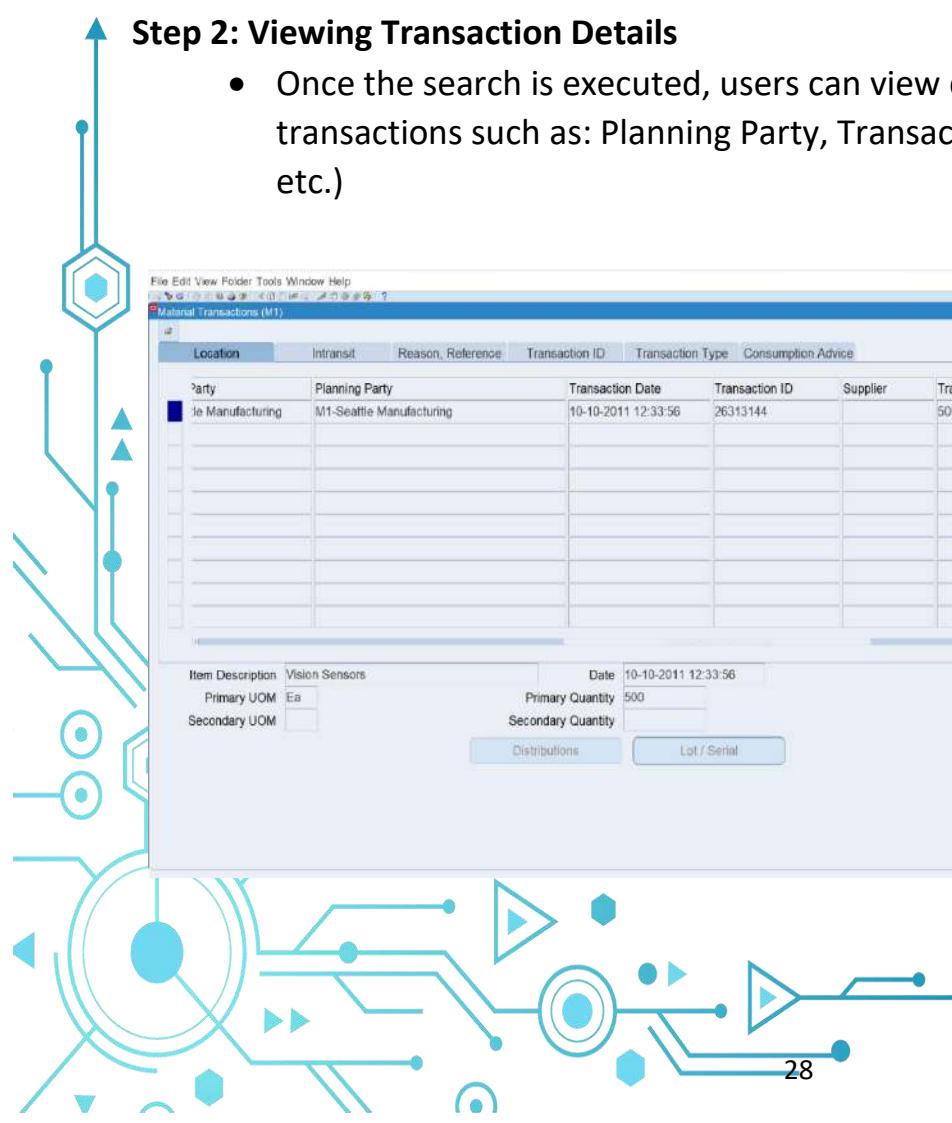
### Step 1: Access Material Transactions

- Navigate to inventory -> transactions -> Material Transactions.
- From Find Material Transactions screen: insert the item
- Click Find



### Step 2: Viewing Transaction Details

- Once the search is executed, users can view details of the material transactions such as: Planning Party, Transaction ID, Supplier, Source Type, etc.)



Location	Intransit	Reason, Reference	Transaction ID	Transaction Type	Consumption Advice
Party M1 Manufacturing	M1-Seattle Manufacturing		10-10-2011 12:33:56	26313144	Supplier 500 250

Item Description: Vision Sensors  
 Primary UOM: Ea  
 Secondary UOM:

Date: 10-10-2011 12:33:56  
 Primary Quantity: 500  
 Secondary Quantity:

Distributions  
 Lot / Serial

File Edit View Folder Tools Window Help

Material Transactions (M1)

Location	Intransit	Reason, Reference	Transaction ID	Transaction Type	Consumption Advice
Ea			26313144	10-10-2011 12:33:56	Inventory
					Miscellaneous receipt

Item Description: Vision Sensors Date: 10-10-2011 12:33:56  
Primary UOM: Ea Primary Quantity: 500  
Secondary UOM: Secondary Quantity:

## 14. On hand quantity

### Steps 1: on hand quantity

- In the inventory Responsibility -> hand availability -> on hand quantity.
- In Query Material Window Enter relevant details such as: Item name (e.g., RGID 010), the Click find

File Edit View Folder Tools Window Help

Query Material

Functions | Documents | Processes

On-hand, Availability/On-hand Quantity

View Item On-hand Quantities

- + Inbound
- + Transactions
- On-hand, Availability
- On-hand Quantity**
- Material Workbench
- Resource Supply
- Item Supply/Demand
- View Potential Shortage
- Reservations
- Reservations Interface
- Reservations Interface Manager
- Lots
- Serial Numbers
- Generate Serial Numbers
- + Inventory Positions
- Mult-organization Quantity
- + Items
- + Costs
- + Counting
- + Kanban
- + Planning
- + ABC Codes

Query Description

Material

Organization: M1 Subinventory: Seattle Manufacturing

Show Disabled Subinventory/Locator in LOV

Locator: Quantities:

View By: Location Detailed

Material Locations

On-hand Receiving Inbound

Item Lot Serial LPN Project Consigned/VMI Interorg Supplier Receipt

Item: RGBD 010

Description: Mult

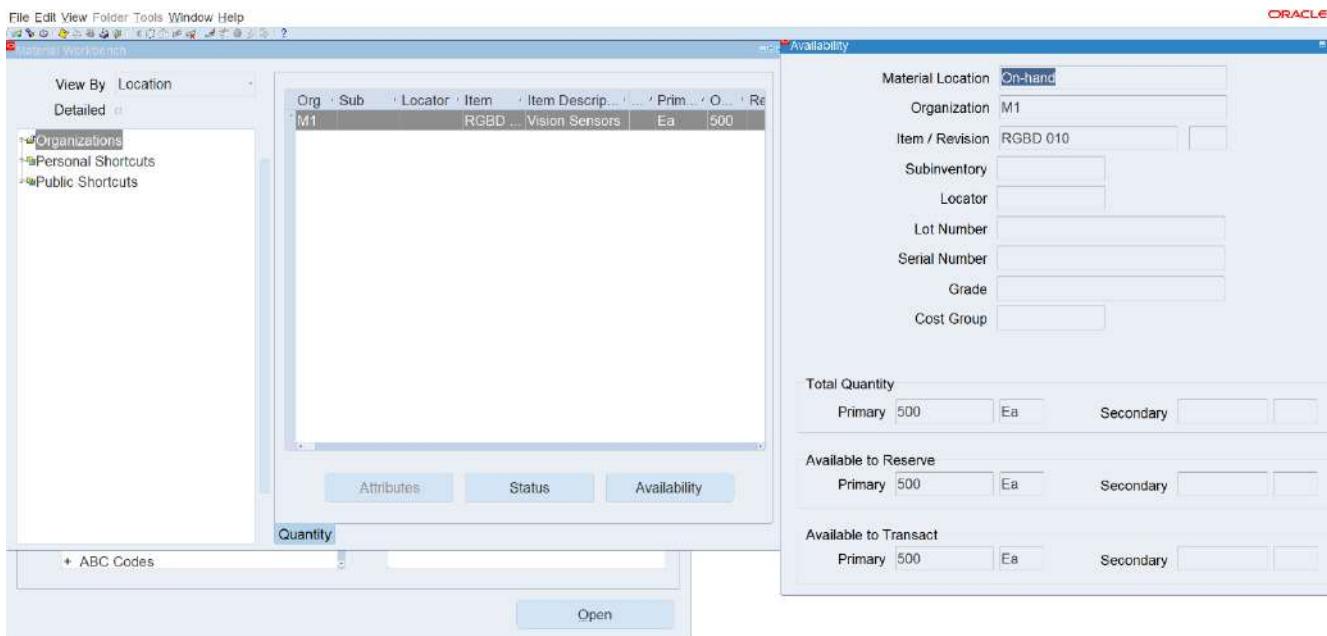
Item Cross References

Cost Group: Status: Category Set: Category:

Save Delete (A) Clear Find

## Step 2: Check Availability

- Move to the material work bench, click availability tab.
- Here, you can see detailed information about the item's availability: (Total Quantity, Available to Reserve,) Available to Transact



The screenshot shows the Oracle Material Workbench interface. The top menu includes File, Edit, View, Folder, Tools, Window, and Help. The main window displays a grid of items with columns for Org, Sub, Locator, Item, Item Description, Primary, and Revision. One row is selected for 'Vision Sensors' with a quantity of 500. To the right of the grid is the 'Availability' tab, which contains several input fields:

Material Location	On-hand
Organization	M1
Item / Revision	RGBD 010
Subinventory	
Locator	
Lot Number	
Serial Number	
Grade	
Cost Group	

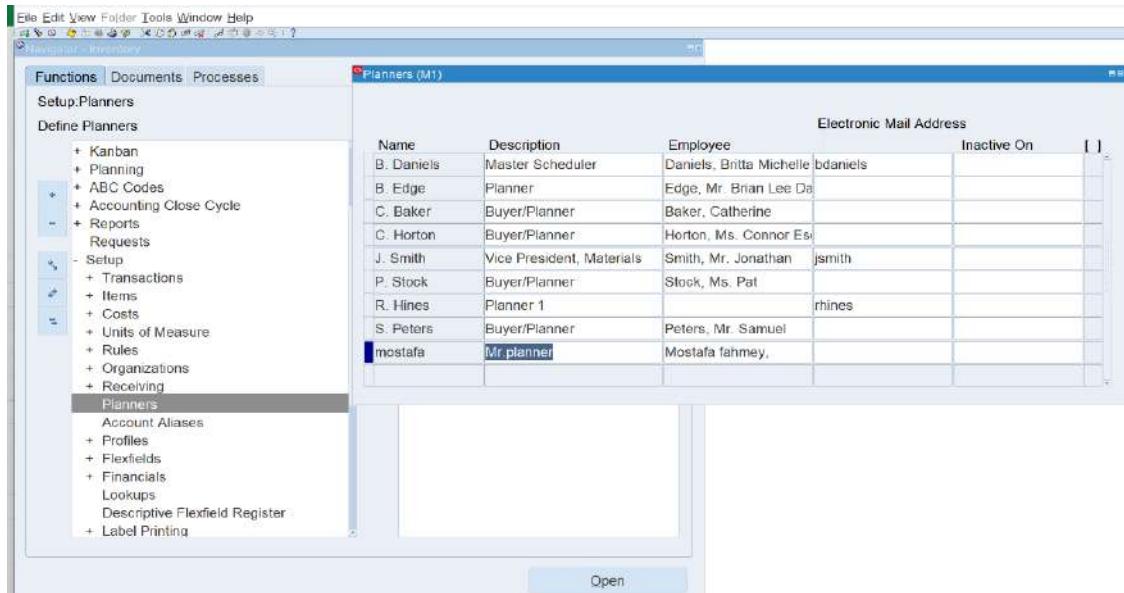
Below these are sections for 'Total Quantity', 'Available to Reserve', and 'Available to Transact', each with primary and secondary quantity fields.



## 15. Planner

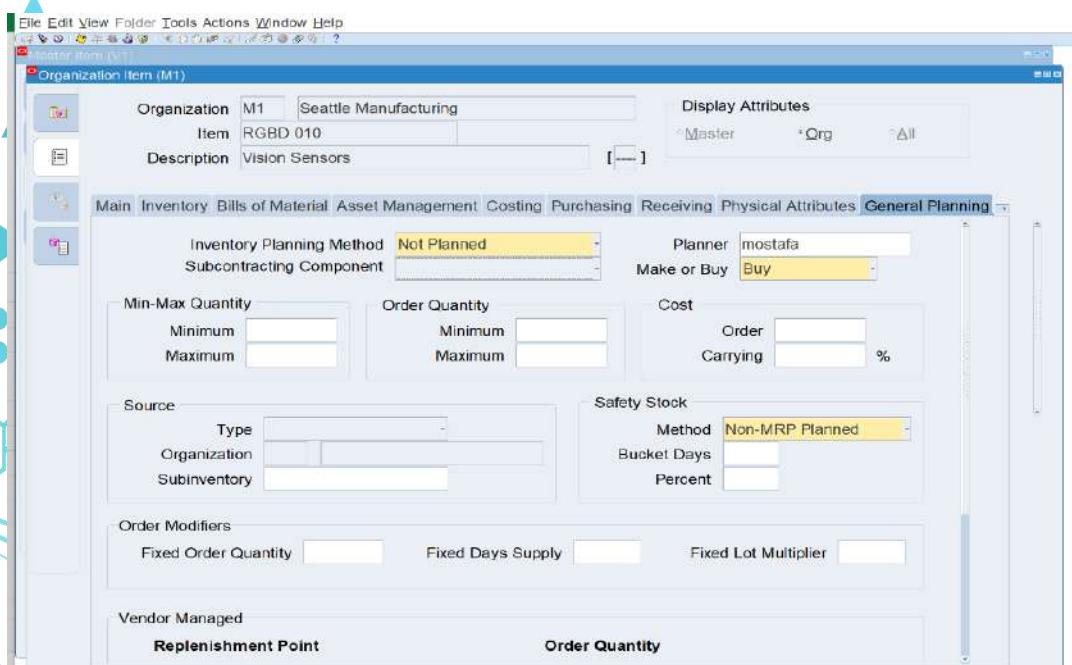
### Step 1: Accessing Planner Setup

- Inventory (responsibility) -> set up (menu) -> Planner (sub menu)
- Select the organization (M1)
- Appears the planner's window
- Click new
- Add Planner Details such as: (name, description, status, etc.)



### Step 2: assign the planner to the item

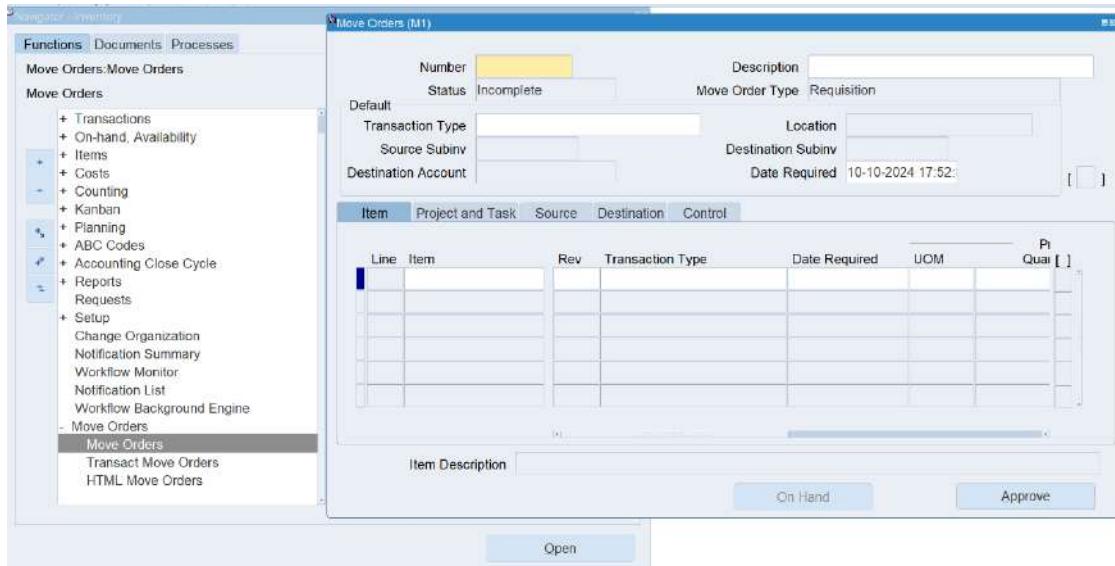
- Inventory(responsibility) -> master item (menu)
- Select the inventory organization (e.g., Seattle Manufacturing) to manage inventory planning.
- From general planning attribute, insert planner name, Insert Planning Method
- Then Save



## 16. Move order issue

### Step 1: Access Move Orders

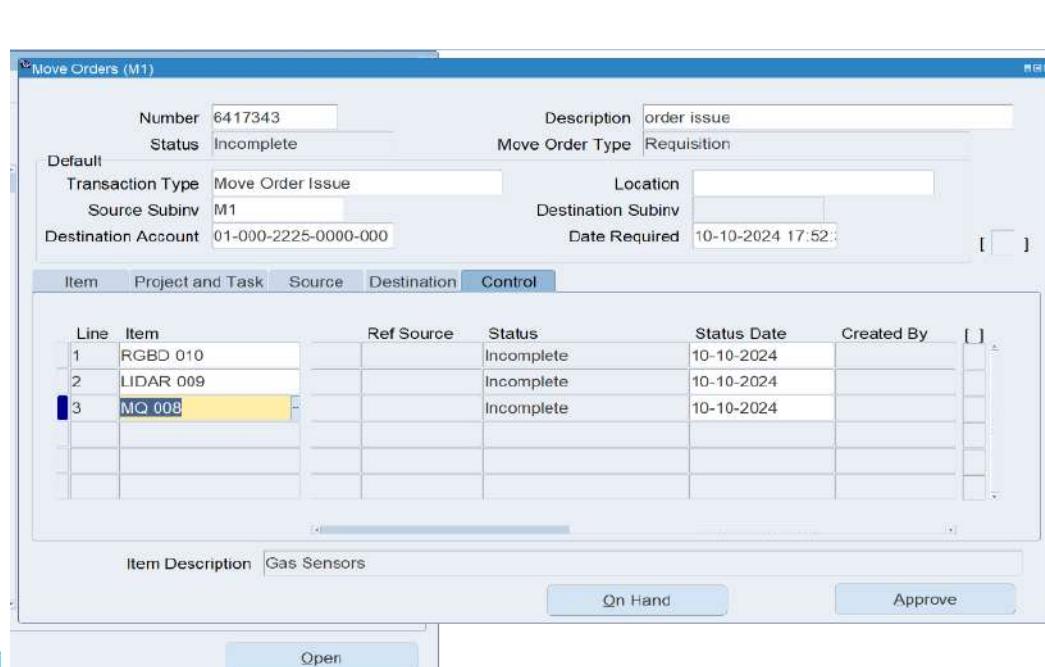
- Navigate to Inventory (responsibility) -> move order (menu)-> move order sub (menu)
- Choose the org (M1)



The screenshot shows the SAP Move Orders (M1) window. The header contains fields for Number (6417343), Description (order issue), Status (Incomplete), Move Order Type (Requisition), Transaction Type (Move Order Issue), Location, Source Subinv (M1), Destination Subinv, and Date Required (10-10-2024 17:52). The main area displays an item table with columns: Line, Item, Rev, Transaction Type, Date Required, UOM, and Qual. The table has three rows, each corresponding to an item: RGBD 010, LIDAR 009, and MQ 008. The MQ 008 row is highlighted with a yellow background.

### Step 2: Create a New Move issue transaction

- From Move Orders (M1) window Fill in the required fields



The screenshot shows the SAP Move Orders (M1) window with the Transaction Type field set to "Move Order Issue". The rest of the header fields are the same as in the previous screenshot. The item table shows the same three items: RGBD 010, LIDAR 009, and MQ 008, with MQ 008 still highlighted.

### Step 3: Approve Move Order

- Click Approve tab
- The status turned from In Complete to Approved, meaning the move order completed successfully and its number is (341734)

Move Orders (M1)

Number	6417343	Description	order issue
Status	Approved	Move Order Type	Requisition
Default		Location	
Transaction Type	Move Order Issue	Destination Subinv	
Source Subinv	M1	Date Required	10-10-2024 17:52:
Destination Account	01-000-2225-0000-000		

**Item**   **Project and Task**   **Source**   **Destination**   **Control**

Line	Item	Rev	Transaction Type	Date Required	UOM	Pt	Qual [ ]
1	RGBD 010		Move Order Issue	10-10-2024 17:52:3	Ea		
2	LIDAR 009		Move Order Issue	10-10-2024 17:52:3	Ea		
3	MQ 008		Move Order Issue	10-10-2024 17:52:3	Ea		

Item Description: Vision Sensors

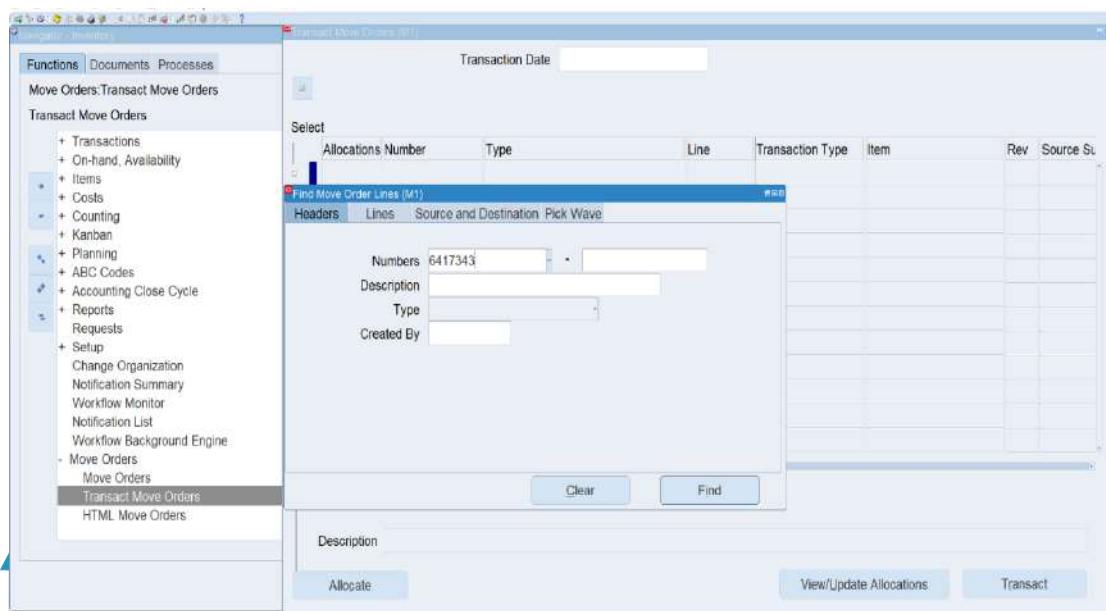
On Hand      Approve      Open



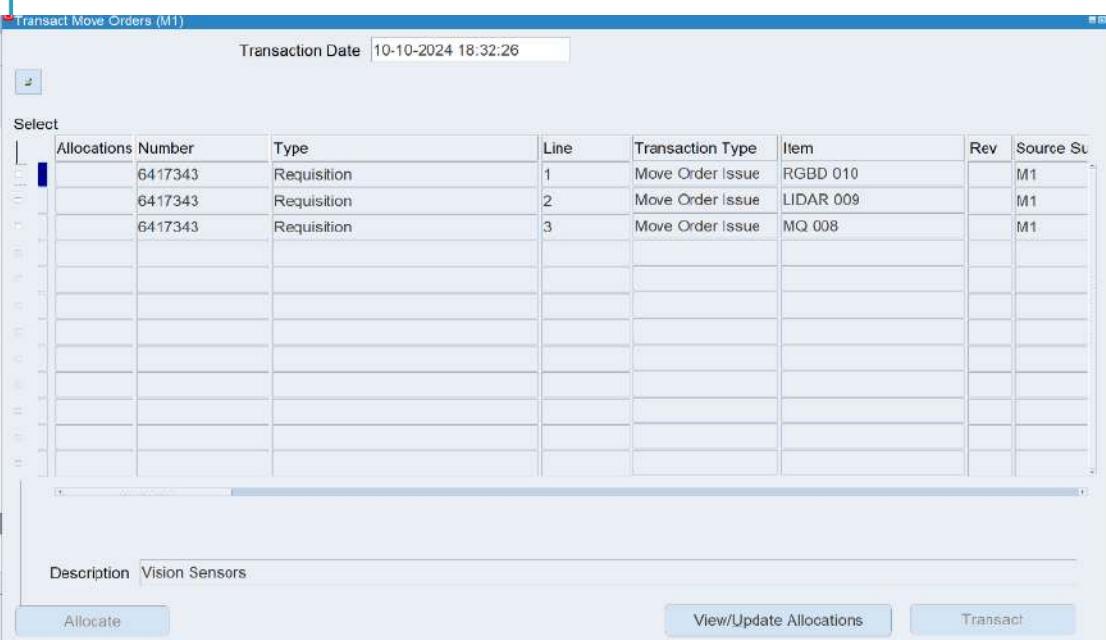
## 17. Transact move order and reserve

### Step 1: Execute the Transaction

- Navigate to Inventory (responsibility) -> move order (menu) -> transact move order (sub menu)
- Search with the move order number (341734), then click; find
- Mark the check box or click allocate tab (Allocation: Single)
- then click transact tab
- The system will process the move order issue, updating inventory levels in sub inventories.



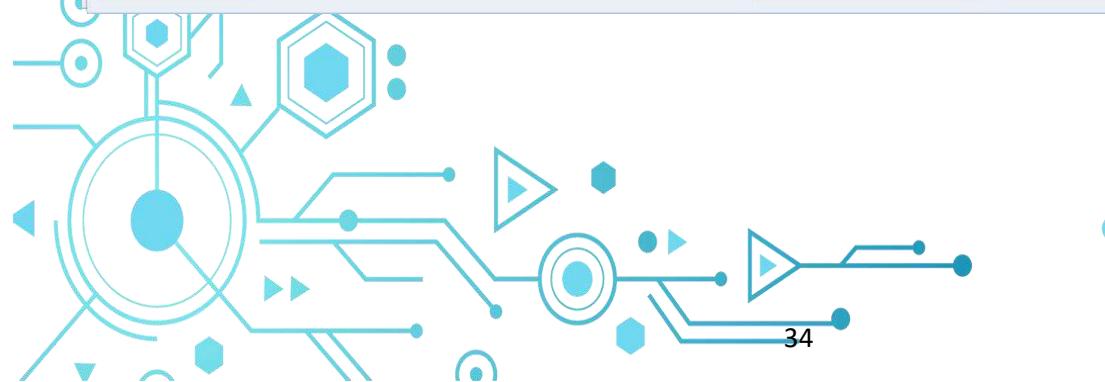
The screenshot shows the 'Transact Move Orders (M1)' window. The left sidebar has a tree view under 'Move Orders' with 'Transact Move Orders' selected. The main area has a 'Select' grid with columns: Allocations Number, Type, Line, Transaction Type, Item, Rev, Source St. A search bar at the top has 'Transaction Date' and a 'Find' button. Below the grid are fields for 'Numbers' (6417343), 'Description', 'Type', and 'Created By'. At the bottom are 'Allocate', 'View/Update Allocations', and 'Transact' buttons.



The screenshot shows the 'Transact Move Orders (M1)' window with the transaction date set to 10-10-2024 18:32:26. The main area displays a 'Select' grid of move order lines. The columns are: Allocations Number, Type, Line, Transaction Type, Item, Rev, Source St. The data in the grid is:

Allocations Number	Type	Line	Transaction Type	Item	Rev	Source St
6417343	Requisition	1	Move Order Issue	RGBD 010		M1
6417343	Requisition	2	Move Order Issue	LIDAR 009		M1
6417343	Requisition	3	Move Order Issue	MQ 008		M1

At the bottom are 'Allocate', 'View/Update Allocations', and 'Transact' buttons.





Sense the Future

## Step 2:

- In the inventory Responsibility, under on hand availability(menu): on hand quantity (sub menu)

## 18. Move order transfer

### Step 1: Access Move Orders

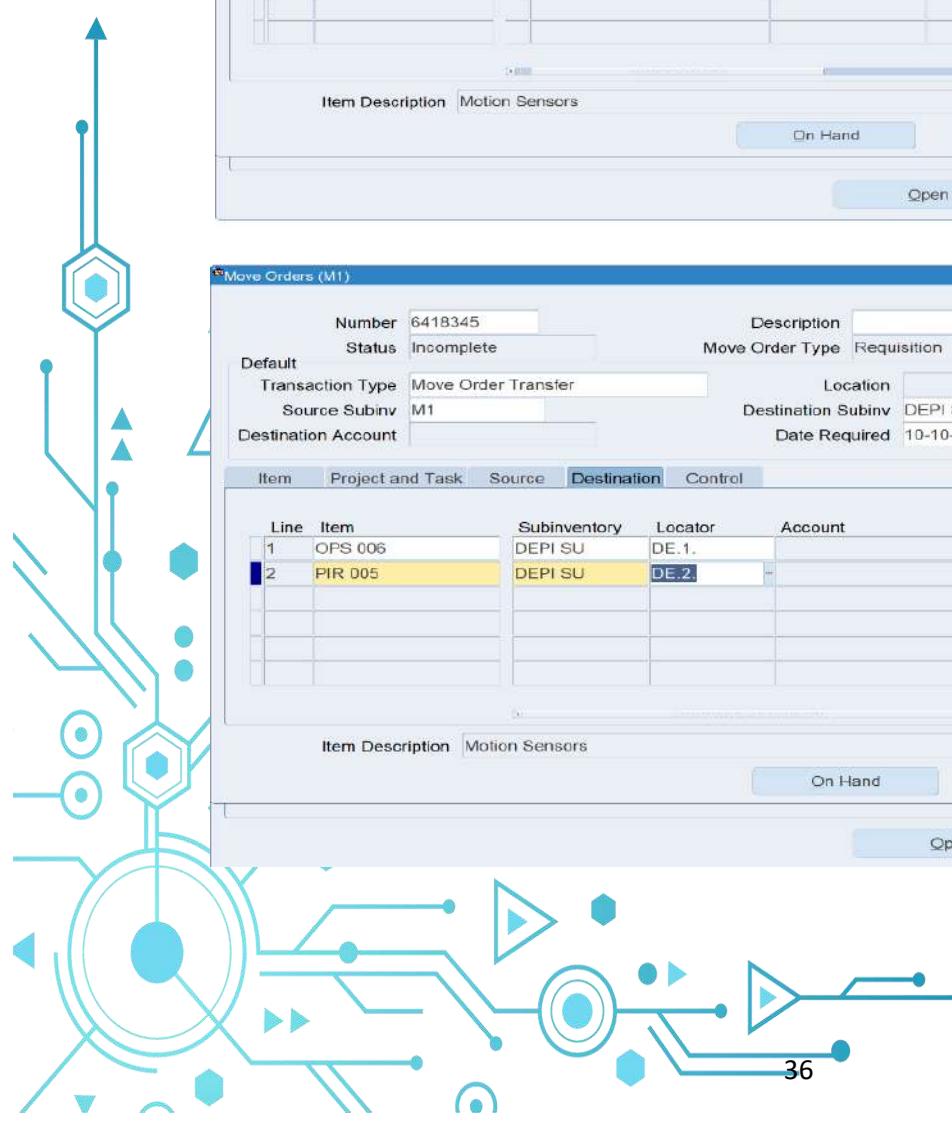
- navigate to Inventory (responsibility) -> move order (menu)-> move order (sub menu)
- choose the org (M1)

### Step 2: Create a New Move transfer transaction

- From Move Orders (M1) window Fill in the required fields: (Transaction Type, Source Subinv, Destination Sub inventory, etc.)

### Step 3: Approve Move Order

- Click Approve tab
- The status turned from incomplete to Approved, meaning the move order completed successfully and its number is (6418345)



**Move Orders (M1)**

Number	6418345	Description	
Status	Incomplete	Move Order Type	Requisition
Default			
Transaction Type	Move Order Transfer	Location	
Source Subinv	M1	Destination Subinv	DEPI SU
Destination Account		Date Required	10-10-2024 20:28:

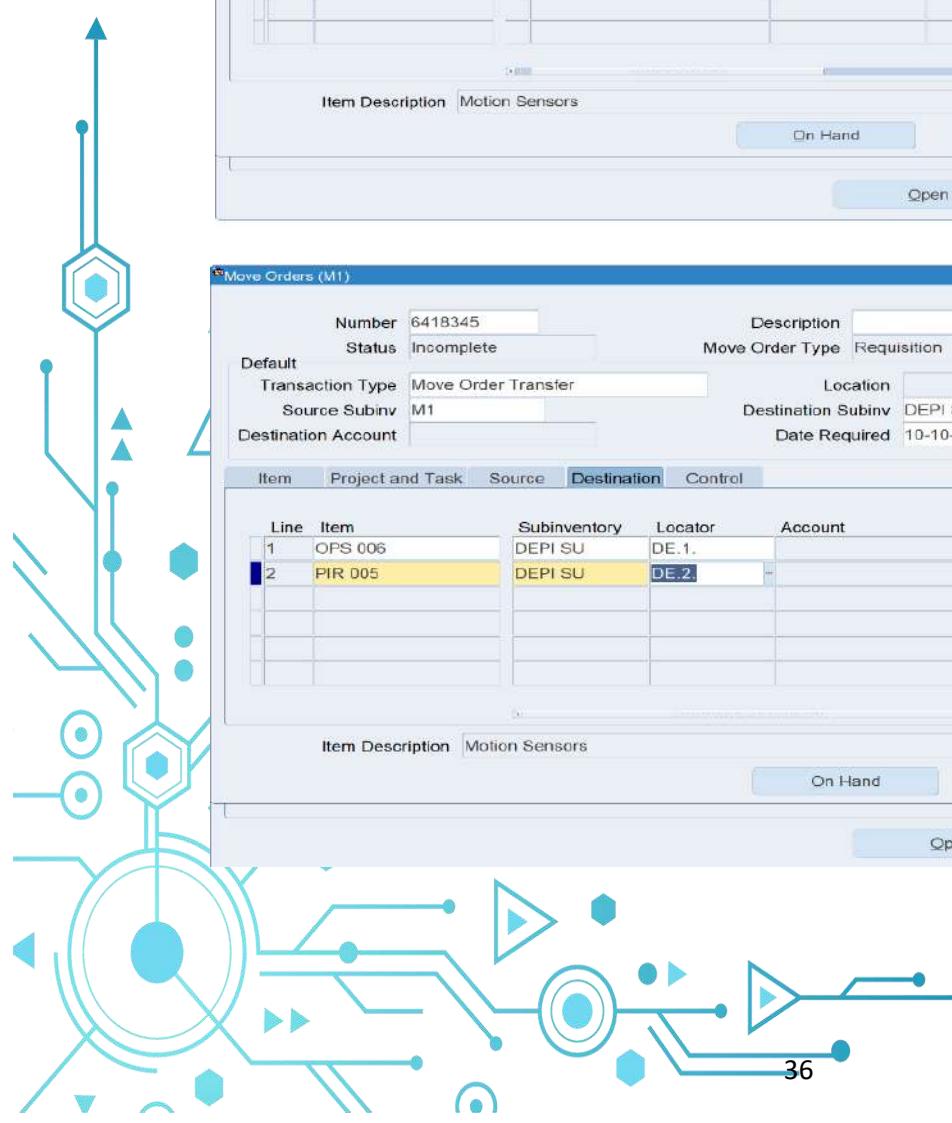
**Item**   **Project and Task**   **Source**   **Destination**   **Control**

Line	Item	Transaction Type	Date Required	UOM	Primary Quantity
1	OPS 006	Move Order Transfer	10-10-2024 20:28:21Ea		100
2	PIR 005	Move Order Transfer	10-10-2024 20:28:21Ea		150

Item Description: Motion Sensors

On Hand      Approve

Open



**Move Orders (M1)**

Number	6418345	Description	
Status	Incomplete	Move Order Type	Requisition
Default			
Transaction Type	Move Order Transfer	Location	
Source Subinv	M1	Destination Subinv	DEPI SU
Destination Account		Date Required	10-10-2024 20:28:

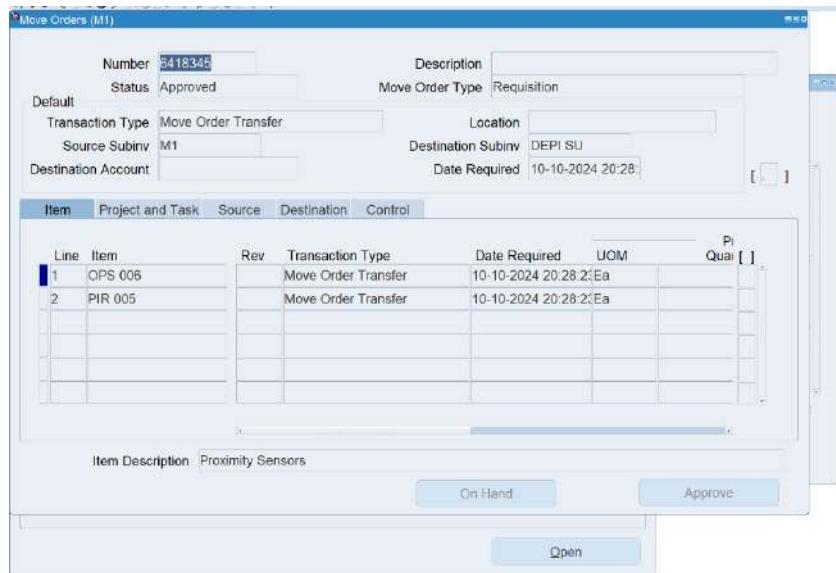
**Item**   **Project and Task**   **Source**   **Destination**   **Control**

Line	Item	Subinventory	Locator	Account	Location
1	OPS 006	DEPI SU	DE.1.		
2	PIR 005	DEPI SU	DE.2.		

Item Description: Motion Sensors

On Hand      Approve

Open



Move Orders (M1)

Number	6418345	Description	Move Order Type	Requisition
Default Status	Approved	Location		
Transaction Type	Move Order Transfer	Destination SubInv	DEPI SU	
Source SubInv	M1	Date Required	10-10-2024 20:28	
Destination Account			[ ]	

**Item** Project and Task Source Destination Control

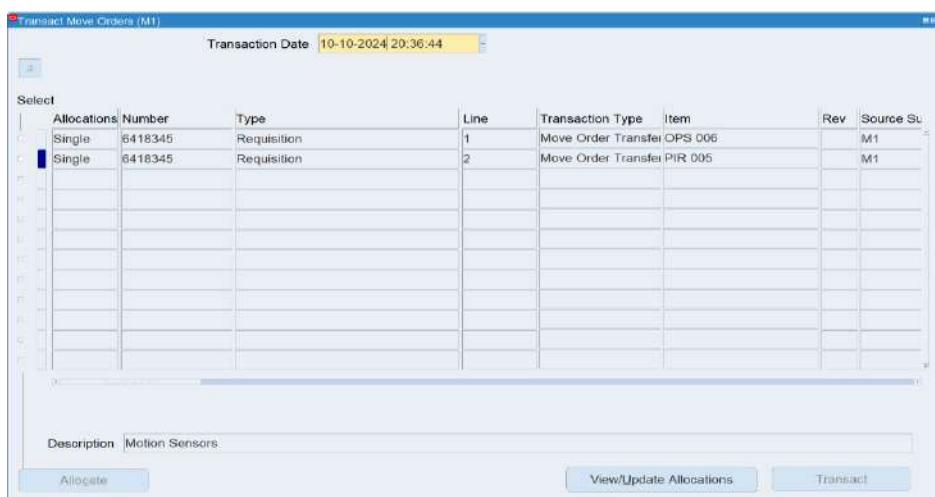
Line	Item	Rev	Transaction Type	Date Required	UOM	Pi	Quai [ ]
1	OPS 006		Move Order Transfer	10-10-2024 20:28	Ea		
2	PIR 005		Move Order Transfer	10-10-2024 20:28	Ea		

Item Description: Proximity Sensors

On Hand Approve Open

## Step 4: Execute the Transaction

- Navigate to Inventory (responsibility) -> move order (menu) -> transact move order (sub menu)
- Search with the move order number (6418345), then click find
- Mark the check box or click allocate tab then click transact tab
- The system will process the move order transfer, updating inventory levels in sub inventories.



Transact Move Orders (M1)

Transaction Date: 10-10-2024 20:36:44

Select

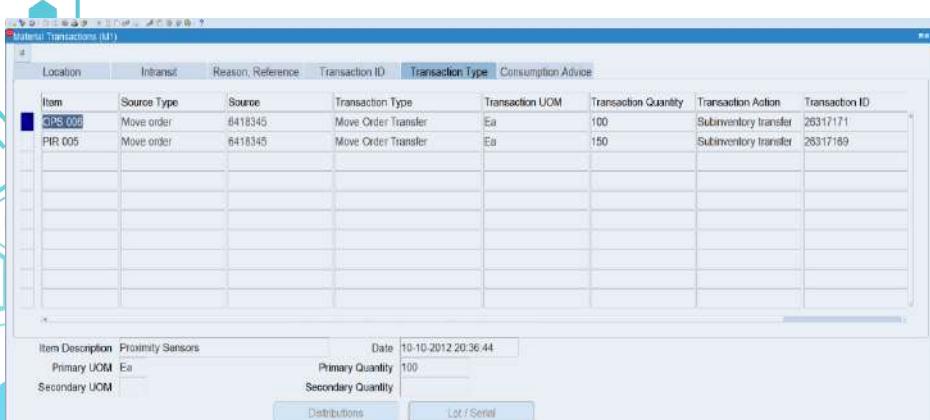
Allocations	Number	Type	Line	Transaction Type	Item	Rev	Source Su
Single	6418345	Requisition	1	Move Order Transfer	OPS 006		M1
Single	6418345	Requisition	2	Move Order Transfer	PIR 005		M1

Description: Motion Sensors

Allocate View/Update Allocations Transact

## Step 5: transact tracking and verifying

- Navigate to Inventory (responsibility) -> Transaction (menu)-> material transaction (sub menu)



Material Transactions (M1)

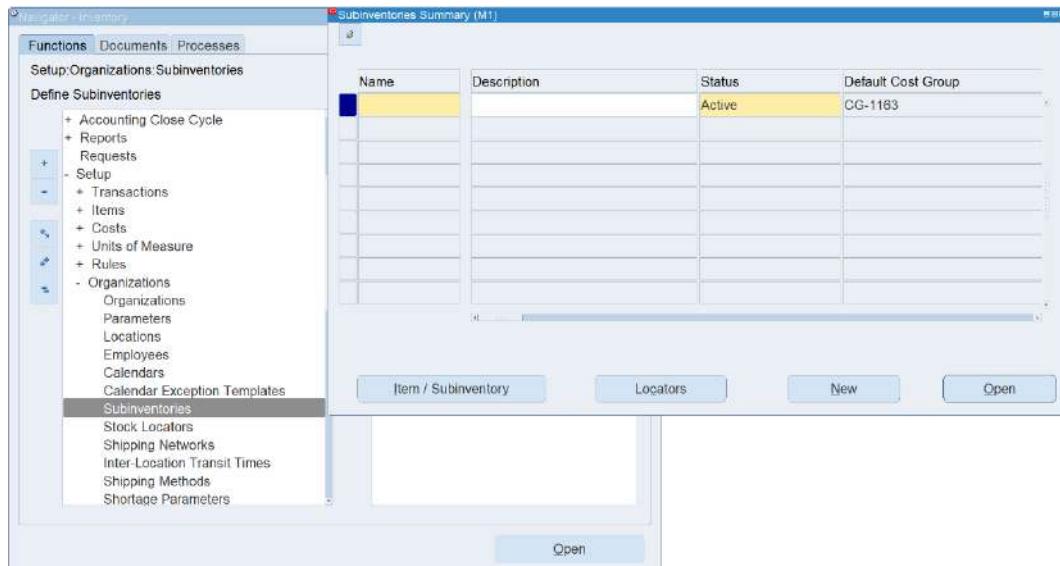
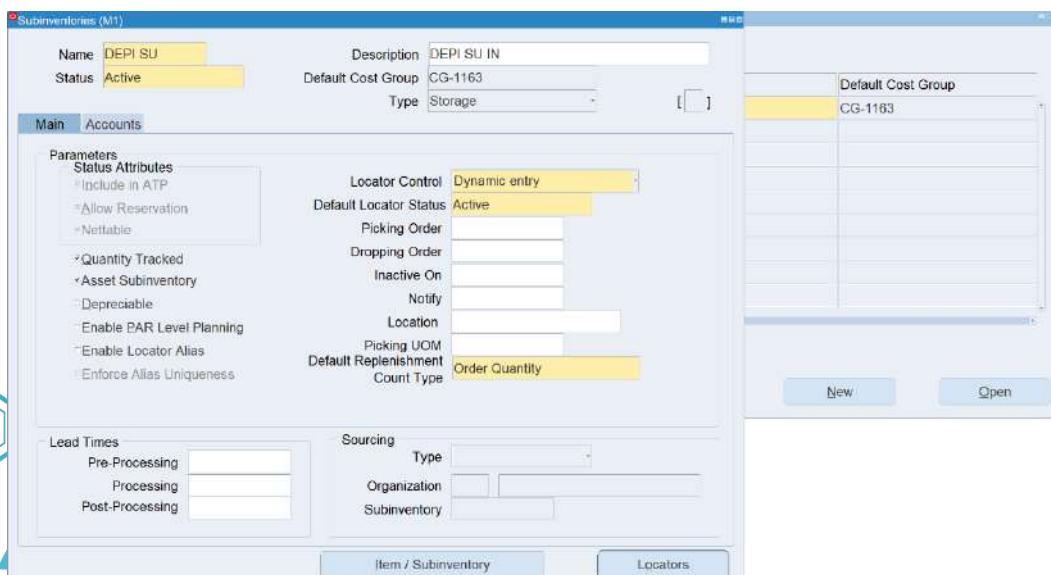
Location	Intransit	Reason/Reference	Transaction ID	Transaction Type	Consumption Advice			
OPS 006	Move order	6418345		Move Order Transfer	Ea	100	Subinventory transfer	26317171
PIR 005	Move order	6418345		Move Order Transfer	Ea	150	Subinventory transfer	26317189

Item Description: Proximity Sensors Date: 10-10-2024 20:36:44 Primary UOM: Ea Primary Quantity: 100 Secondary UOM: Secondary Quantity: 150 Distributions Lot / Serial Open

## 19. Sub inventory

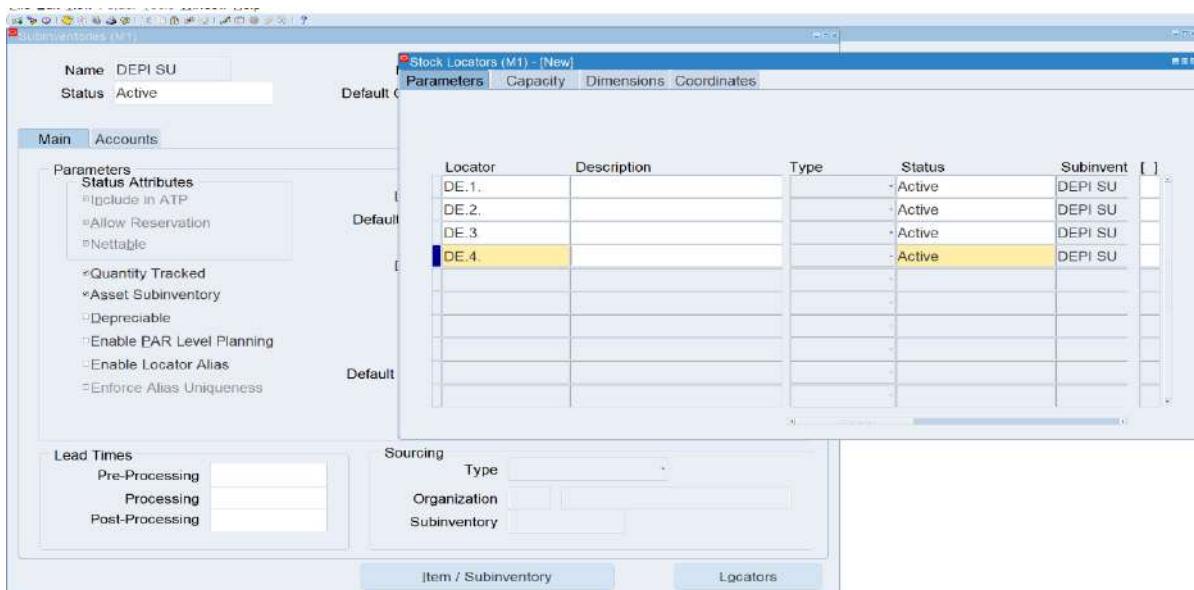
### Step1: Create Sub inventory:

- From: Inventory (responsibility) set up (menu) organization (sub menu) sub inventories (Function)
- Click New

**Step 2: Insert sub inventory name (DEPI SU), description (DEPI SU IN) and locator control (dynamic entry)**

- Ensure the status is set to "Active."
- Click locators' tab
- In the stock locations section, create locators (DE.3, DE.4 etc.)
- Click save



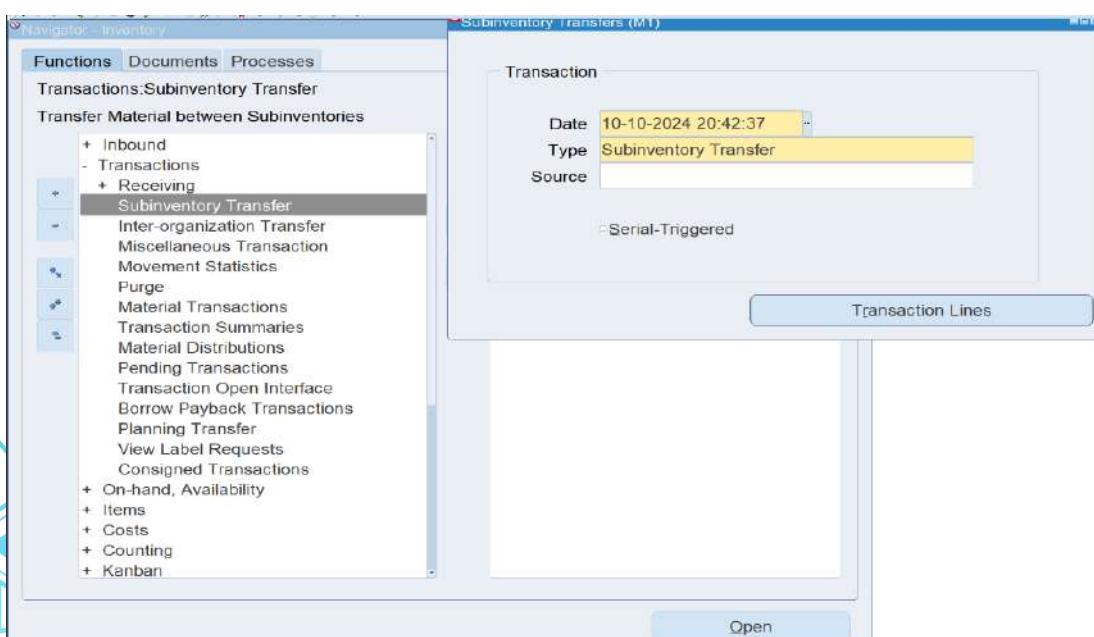
## 20. Sub-inventory Transfer

### Step 1: Access the Sub-inventory Transfer Interface:

- Navigate to Inventory (responsibility) -> Transaction (menu)-> Sub-inventory Transfer (sub menu)
- Insert transaction type, then click transaction line

### Step 2: Enter Item Information

- Item name (PRS 006), Source Sub-inventory (from which the item will be transferred: DEPI SU), Destination Sub-inventory (where the item will be moved: GI) , Quantities
- Click save





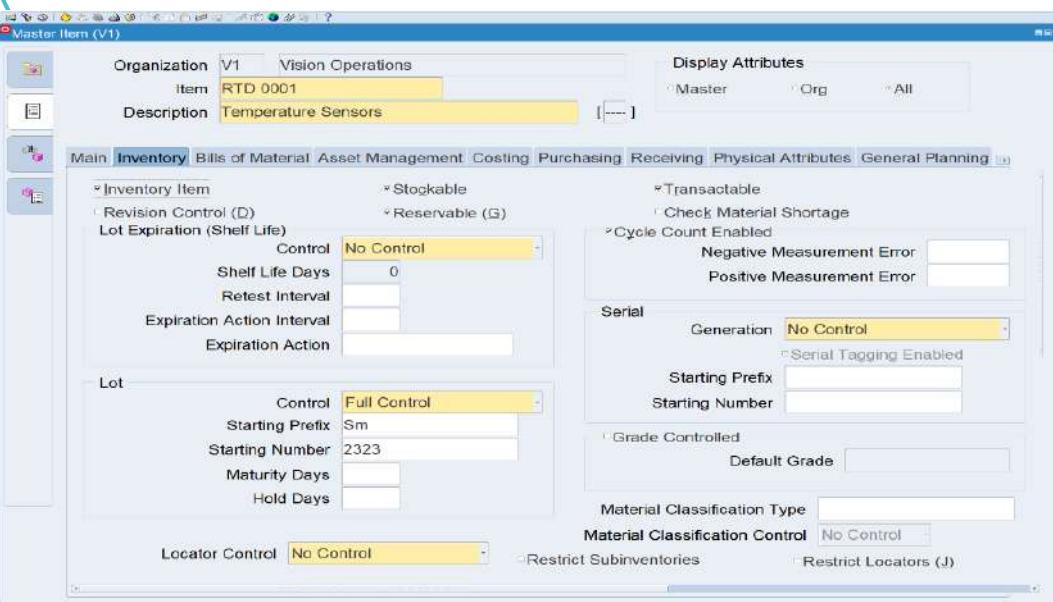
### **Step 3: Transact tracking and verifying**

- Navigate to Inventory (responsibility) -> Transaction (menu)-> material transaction (sub menu)

## 21. Lot

## Step 1:

- Open master item window -> click attribute group tab -> from inventory attribute
  - Insert in the lot block the lot details (control, starting prefix, and starting number) then save
  - Assign the changes to(M1) From organization assignment tab, click org attribute
  - Ensure the lot details are assigned to inv org from organization item window (cont.)



**Organization Item (M1)**

Organization	M1	Seattle Manufacturing	Display Attributes	Master	Org	All
Item	RTD 0001	Description	Temperature Sensors			
<a href="#">Main</a> <a href="#">Inventory</a> <a href="#">Bills of Material</a> <a href="#">Asset Management</a> <a href="#">Costing</a> <a href="#">Purchasing</a> <a href="#">Receiving</a> <a href="#">Physical Attributes</a> <a href="#">General Planning</a>						
<b>Inventory Item</b> <input checked="" type="checkbox"/> Stockable <input type="checkbox"/> Transactable <input type="checkbox"/> Revision Control (D) <input checked="" type="checkbox"/> Reservable (G) <input type="checkbox"/> Check Material Shortage <input type="checkbox"/> Lot Expiration (Shelf Life) <input checked="" type="checkbox"/> Cycle Count Enabled Control: No Control <input type="checkbox"/> Negative Measurement Error Shelf Life Days: 0 <input type="checkbox"/> Positive Measurement Error Retest Interval: Expiration Action Interval: Expiration Action:  <b>Lot</b> <input type="checkbox"/> Grade Controlled Control: Full Control <input type="checkbox"/> Material Classification Type Starting Prefix: Sm <input type="checkbox"/> Material Classification Control Starting Number: 2323 <input type="checkbox"/> Restrict Subinventories Maturity Days: <input type="checkbox"/> Restrict Locators (J) Hold Days:  <b>Locator Control</b> <input type="checkbox"/> Locator Control <input type="checkbox"/> Restrict Locators <input type="checkbox"/> No Control						

**Material Transactions (M1)**

Location	Intransit	Reason, Reference	Transaction ID	Transaction Type	Transaction Action	Transaction UOM	Transaction Quantity	Transaction ID
OPS 006	Inventory			Subinventory Transfer	Subinventory transfer	Ea	100	26317178
PIR 005	Inventory			Subinventory Transfer	Subinventory transfer	Ea	150	26317178
AST2111	Sales order	64333 Mixed ORDER E Sales Order Pick		Staging transfer	Staging transfer	Ea	-50	22278879
AST2111	Sales order	64332 Mixed ORDER E Sales Order Pick		Staging transfer	Staging transfer	Ea	-50	22278881
AST2111	Sales order	64331 Mixed ORDER E Sales Order Pick		Staging transfer	Staging transfer	Ea	-50	22277884
AST2111	Sales order	64330 Mixed ORDER E Sales Order Pick		Staging transfer	Staging transfer	Ea	-35	22277877
XA6000	Sales order	63671 Order Only ORD Sales Order Pick		Staging transfer	Staging transfer	Ea	-10	22115032
XA6000	Sales order	63670 Order Only ORD Sales Order Pick		Staging transfer	Staging transfer	Ea	-5	22115013
XA5000	Sales order	63670 Order Only ORD Sales Order Pick		Staging transfer	Staging transfer	Ea	-50	22115011
XA4000	Sales order	63670 Order Only ORD Sales Order Pick		Staging transfer	Staging transfer	Ea	-25	22115009

Item Description: Proximity Sensors Date: 10-10-2012 20:42:37  
Primary UOM: Ea Primary Quantity: 100  
Secondary UOM: Secondary Quantity:

## Step 2: Generating lots

- Miscellaneous transaction window inserts (item, sub-inventory, quantity)
- Click lot/serial tab
- In lot entry window insert lot numbers and quantity then done

**Miscellaneous Transaction (M1)**

Item	Inventory	Locator	Lot	Expires On	UOM	Quantity	Secondary UOM	Secondary Qty	Unit Cost	Account	Location
RTD 0001	DE 2				Ea	150				01-422-5110-00	

Description: Temperature Sensors  
Available: 0 Ea Secondary Available:   
On-hand: 0 Ea Secondary On-hand:

**Lot Entry (M1)**

Item	RTD 0001	Temperature Sensors			
Revision	RTD 0001	UOM	Ea		
Subinventory	DEPI SU	Quantity	150		
Locator	DE 2	Lot Quantity Entered	150		
		Secondary UOM			
		Secondary Quantity			
		Secondary Lot Quantity Entered			
<b>Lot Numbers</b>					
Parent Lot Number	Lot Number	Expiration Date	Quantity		
S04266			50		
S04267			50		
<b>S04268</b>			<b>50</b>		
Quantity Available	0	Secondary Quantity Available			
Quantity On-Hand	0	Secondary Quantity On-Hand			
<b>Generate Parent</b>		<b>Generate Lot</b>	<b>Serial</b>	<b>Cancel</b>	<b>Done</b>

### Step 3: review the lots

- From transaction menu transaction summarize (sub menu)
- Insert item name the summarize tab, then transaction details
- The material transaction window appears click lot / serial tab (no screenshot)

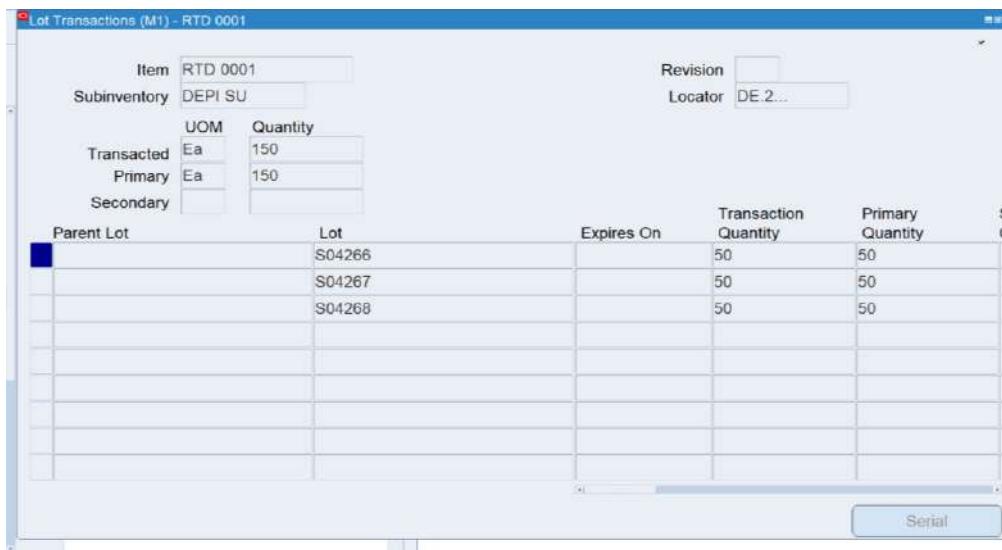
**Summarize Transactions (M1)**

Date:	11-10-2024 23:59
Item:	RTD 0001
Description:	Temperature Sensors
Revision:	
UOM:	Ea
Subinventory:	DEPI SU
Locator:	
Category Set:	
Category:	
Cost Group:	
<b>Clear</b>	
<b>Summarize</b>	

**Transaction Summaries (M1)**

Source Type	Transaction Type	Action	Source / Transaction Type	Cost Group	Subinventory	Cost Group
Inventory						
<b>Totals</b>						
Total In	150	0	0	1		
Total Out	0	0	0	0		
Net	150	0	0	1		
<b>Transaction Details</b>						

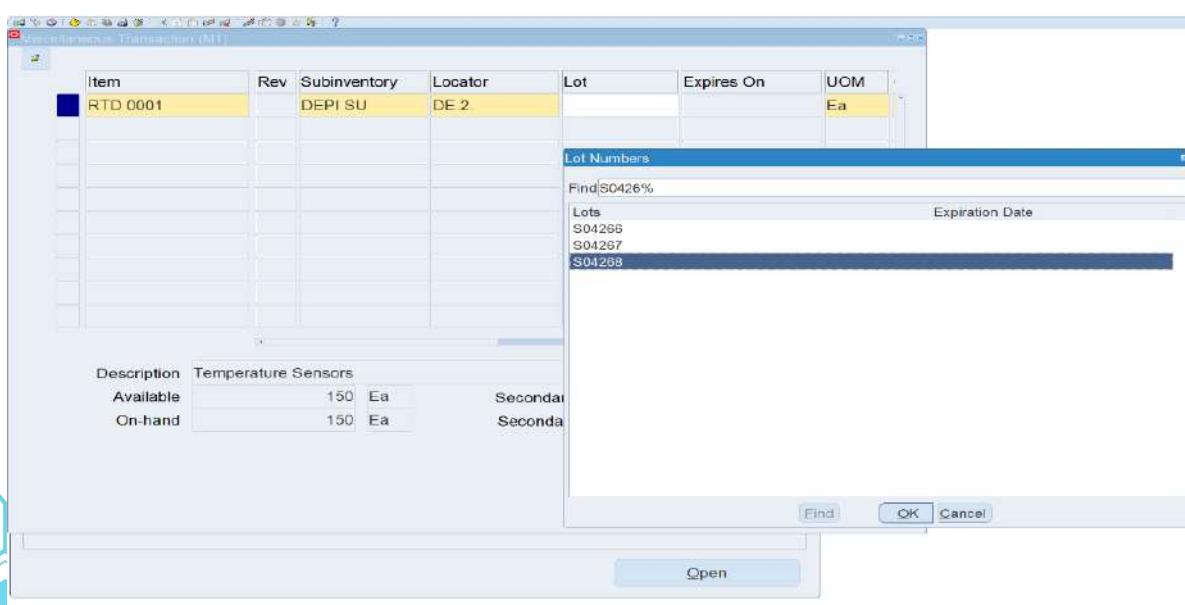
- lot transaction window appears, displays the transaction quantity for each lot



## 22. Lot disables

### Step 1:

- Open miscellaneous transaction window, the item has 3 lots
- From on hand availability (menu) -> on hand quantity (sub menu) to view the quantity on lot level



**Material Workbench**

View By: Lot

Detailed

Org	Sub	Locator	Item	Item Description	Prim...	O...	Re...	In...	Order...	Un...	Pa...
M1			RTD 0...	Temperature ...	Ea	50				50	0
M1			RTD 0...	Temperature ...	Ea	50				50	0
M1			RTD 0...	Temperature ...	Ea	50				50	0

Attributes      Status      Availability

Quantity

Open

Functions Documents Processes

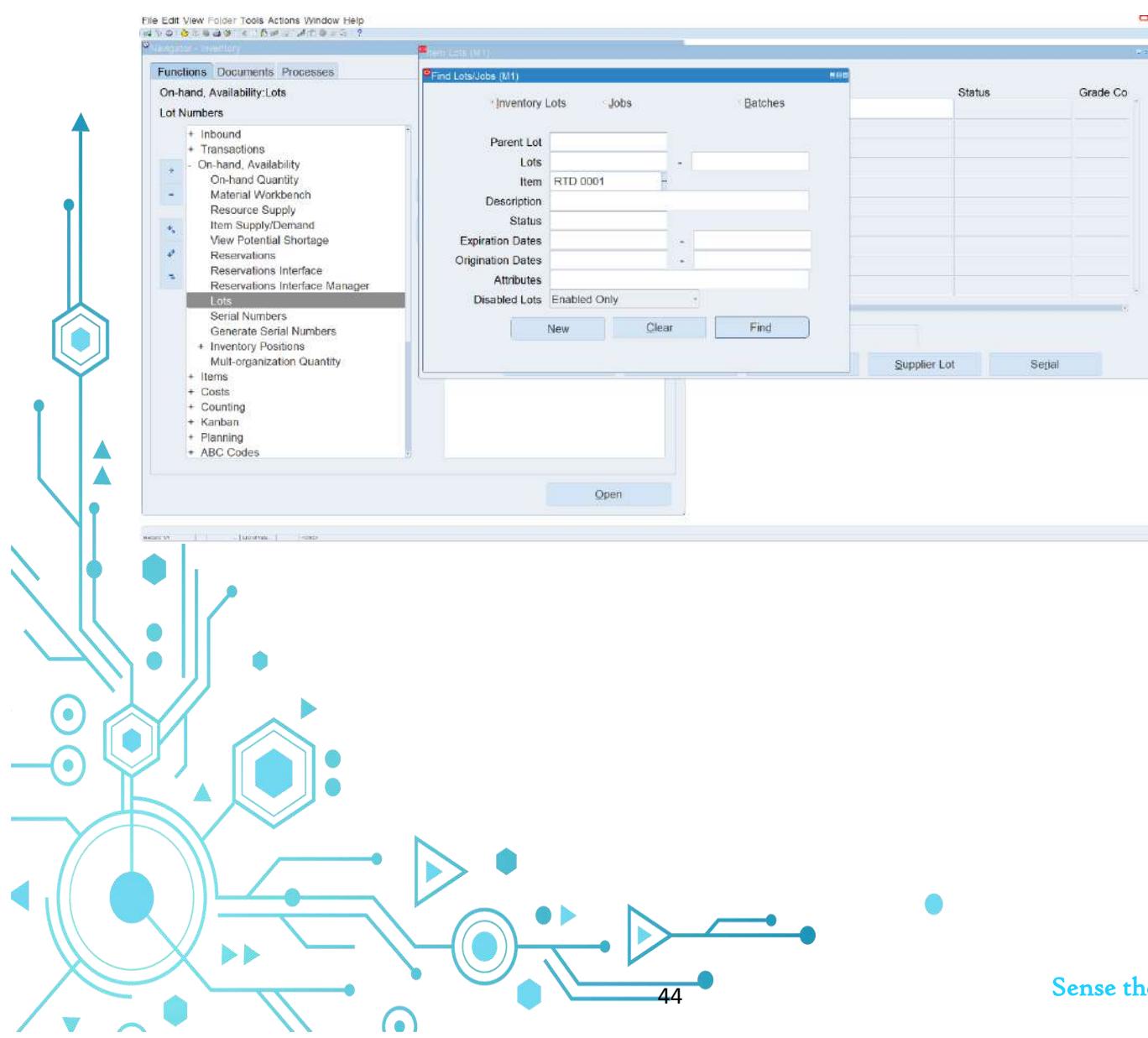
On-hand, Availability: On-hand Quantity

View Item On-hand Quantities

- + Inbound
- + Transactions
- On-hand, Availability
- On-hand Quantity**
- Material Workbench
- Resource Supply
- Item Supply/Demand
- View Potential Shortage
- Reservations
- Reservations Interface
- Reservations Interface Manager
- Lots
- Serial Numbers
- Generate Serial Numbers
- + Inventory Positions
- Multi-organization Quantity
- + Items
- + Costs
- + Counting
- + Kanban
- + Planning
- + ABC Codes

## Step 2:

- From on hand availability (menu) -> lots (sub menu) Insert the item then find
- From item lots window mark the Disable check box to the lot to be removed



File Edit View Folder Tools Actions Window Help

ORACLE INVENTORY

Item Lots (M1)

Lot S04266 S04267 S04268

Receiving LOV Disabled

Item Description: Temperature Sensors

View Genealogy On-hand Transactions Supplier Lot Serial

Open

Functions Documents Processes

On-hand Availability: Lots

- + Inbound
- + Transactions
- On-hand Availability
  - On-hand Quantity
  - Material Workbench
- Resource Supply
- Item Supply/Demand
- View Potential Shortage
- Reservations
- Reservations Interface
- Reservations Interface Manager

Lots

- Serial Numbers
- Generate Serial Numbers
- + Inventory Positions
- Mult-organization Quantity
- + Items
- + Costs
- + Counting
- + Kanban
- + Planning
- + ABC Codes

- In Miscellaneous transaction window will appear the remaining two lots only

Miscellaneous Transaction (M1)

Item	Rev	Subinventory	Locator	Lot	Expires On	UOM
RTD 0001		DEPI SU	DE 2			Ea

Lot Numbers

Find S0426%

Lots	Expiration Date
S04265	
S04267	

Description: Temperature Sensors

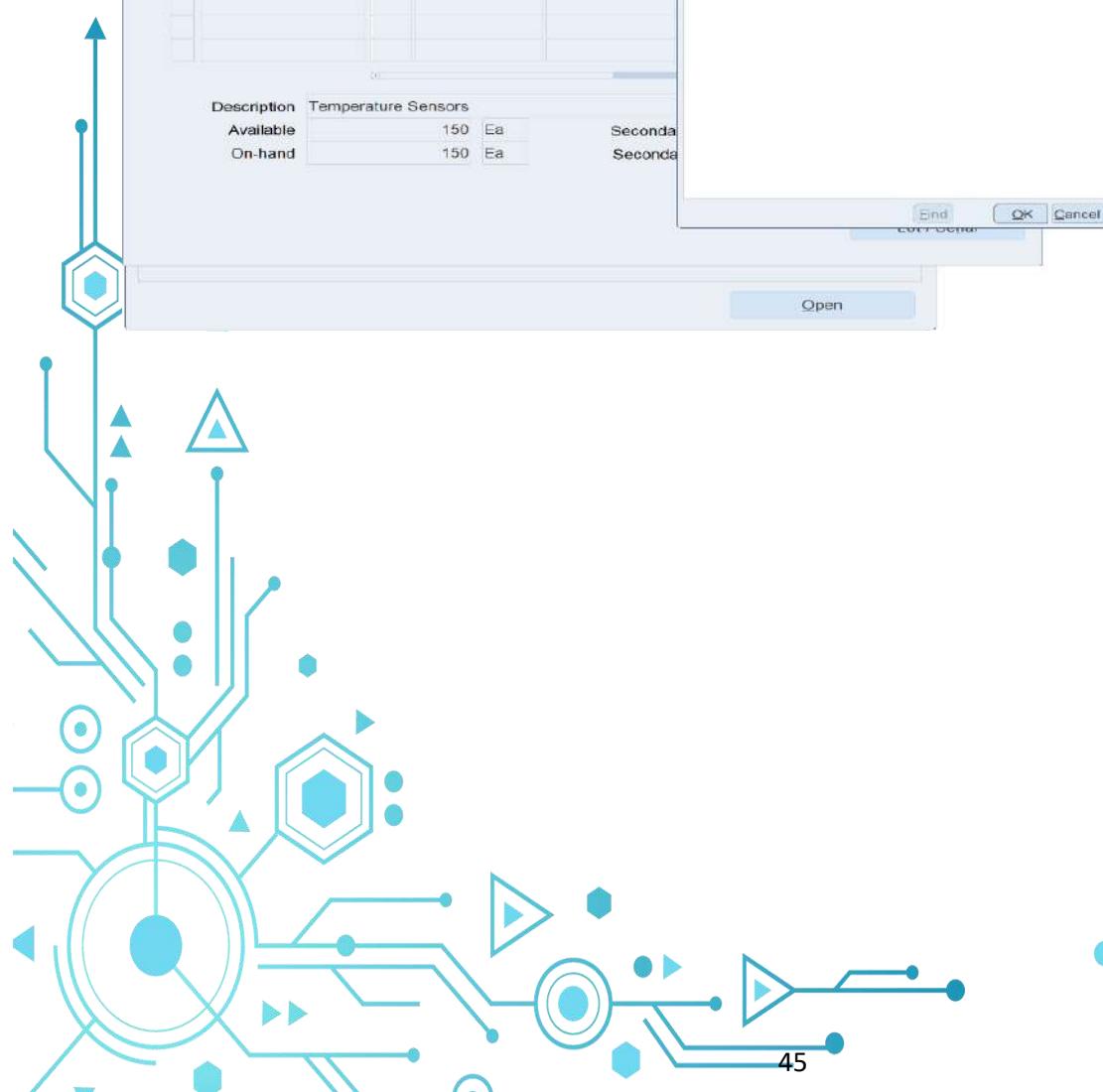
Available: 150 Ea

On-hand: 150 Ea

Seconda

Seconda

Open



## 23. Serial

### Step 1: serial details

- From master item window -> attribute group tab -> inventory -> serial block
- Insert serial details (generation, starting prefix, and starting number) then save
- organization assignment tab, click org attribute
- ensure the serial details are assigned to inv org from organization item window (M1)



**Master Item (V1)**

Organization: V1 Vision Operations  
Item: CAPS 0002  
Description: Pressure Sensors

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

**Serial**  
Generation: Predefined  
Starting Prefix: AV  
Starting Number: 2320



**Organization Item (M1)**

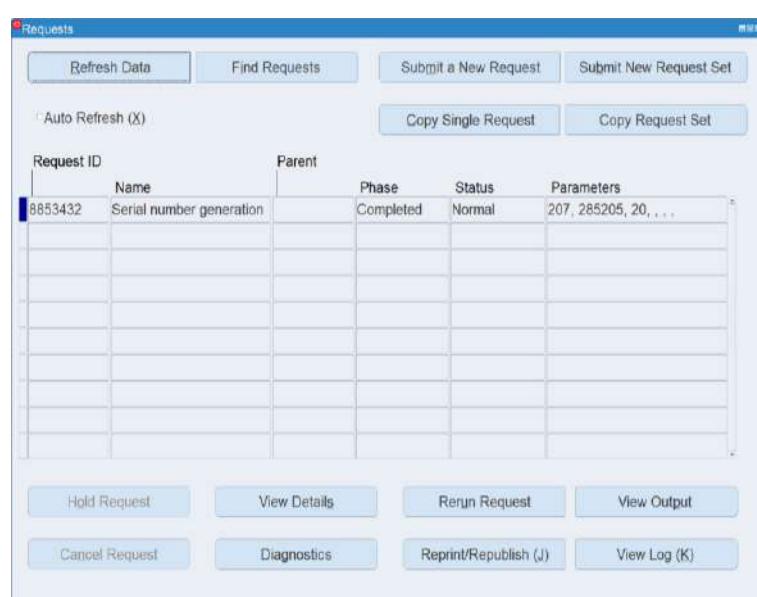
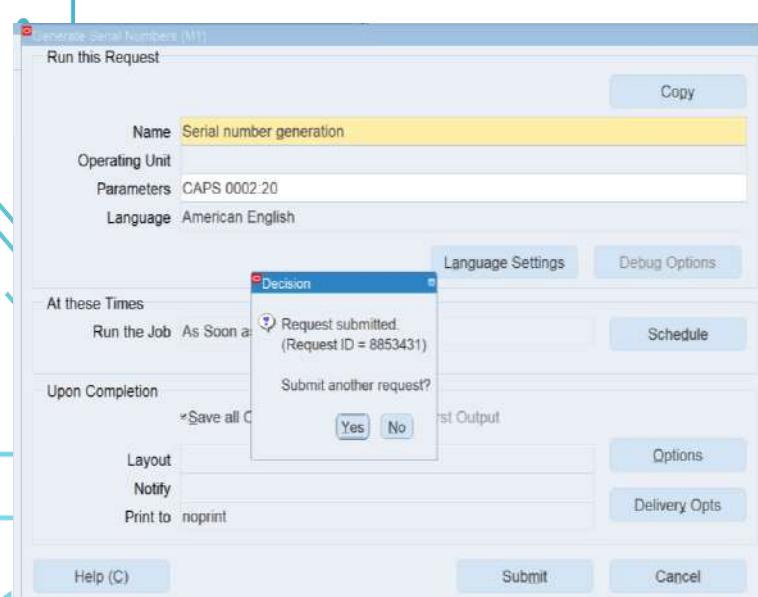
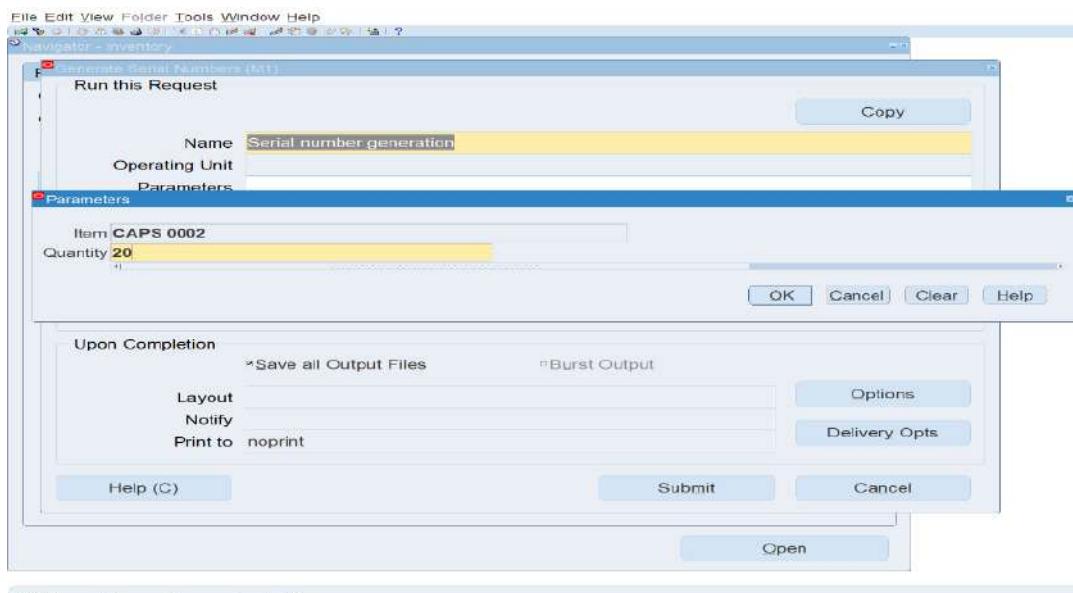
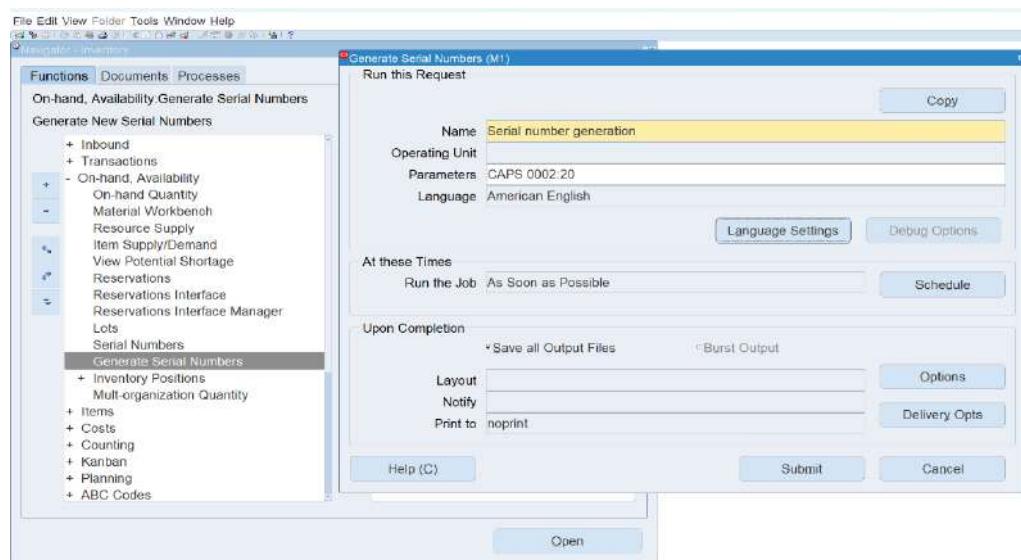
Organization: M1 Seattle Manufacturing  
Item: CAPS 0002  
Description: Pressure Sensors

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

**Serial**  
Generation: Predefined  
Starting Prefix: AV  
Starting Number: 2320

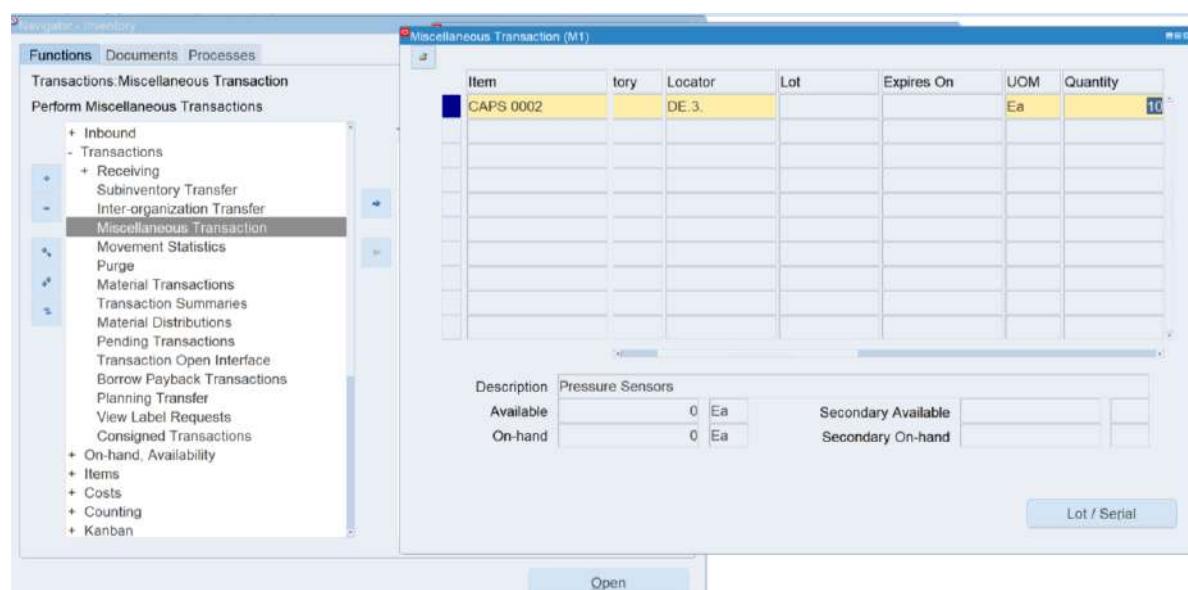
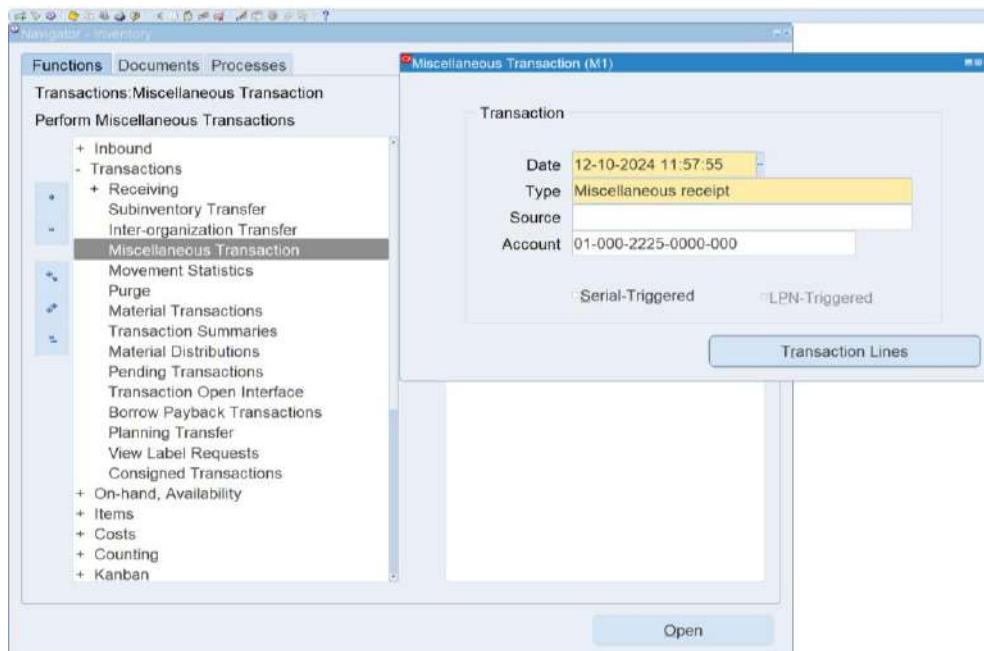
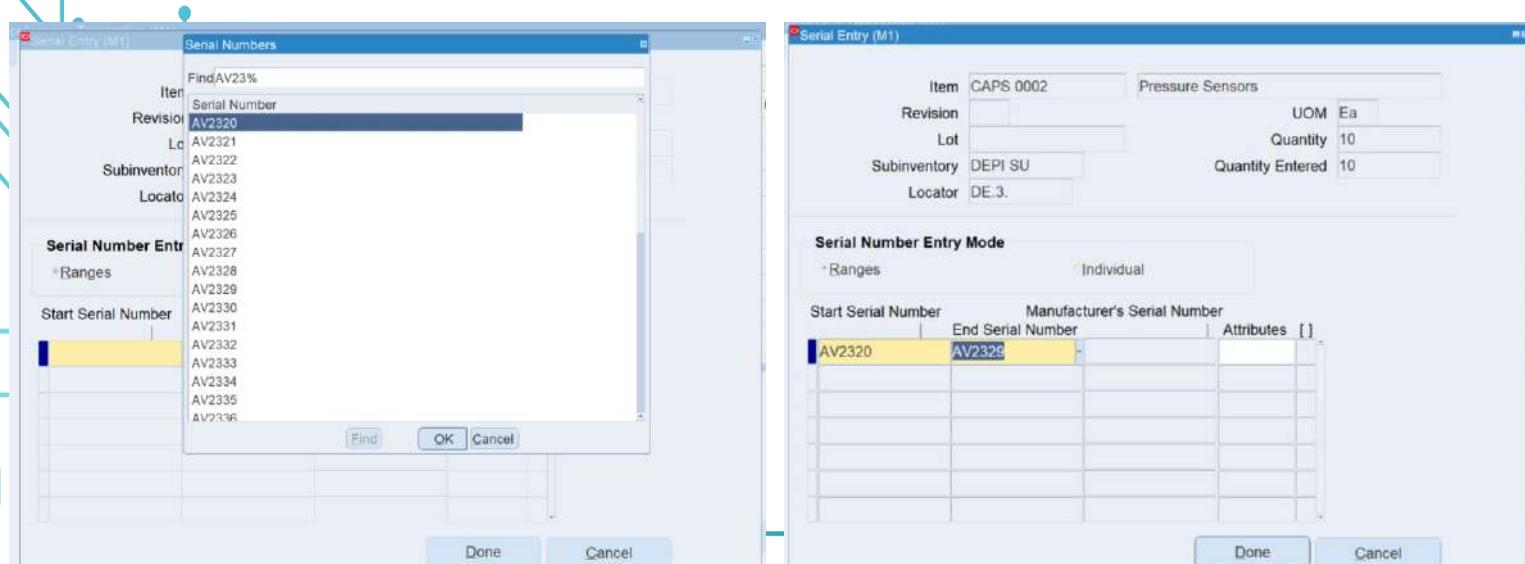
## **Step 2: Run request to generate the serial**

- From on hand quantity (menu) -> generate serial numbers (sub menu)
  - Insert the request name, parameters (item/quantity) then submit
  - From view ->requests (ensure the request is complete normal)



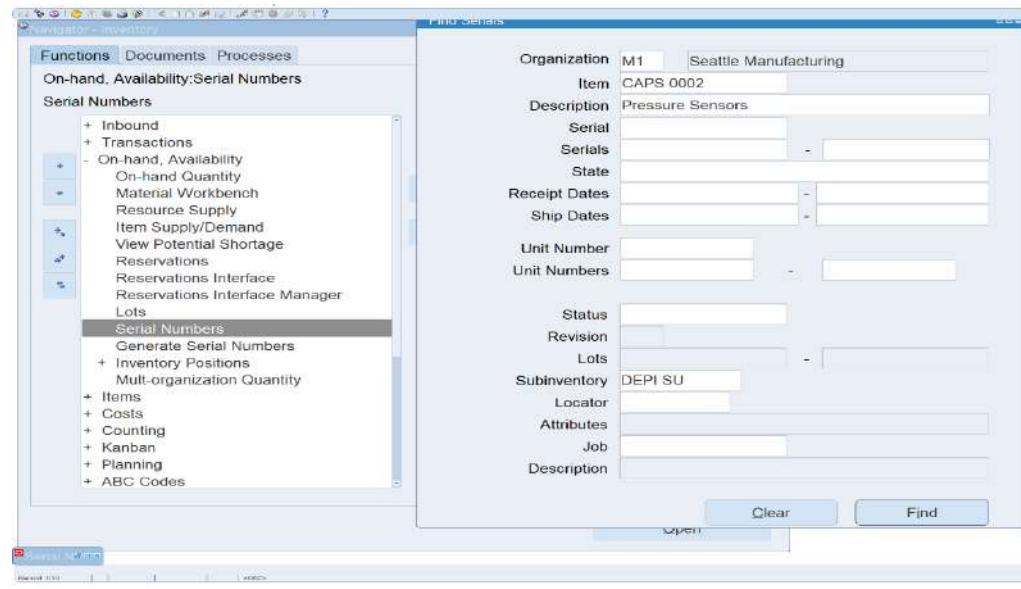
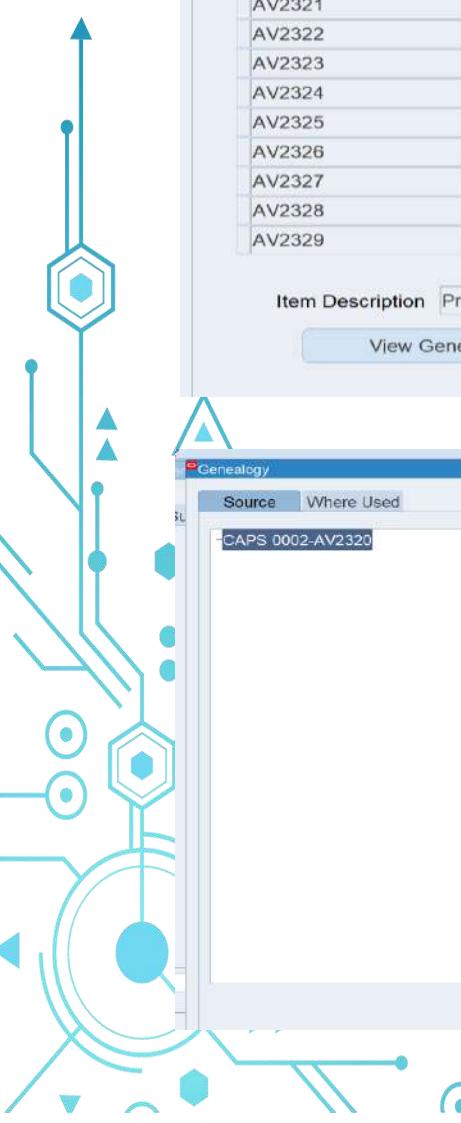
### Step 3: Generating serial

- Miscellaneous transaction window inserts (item, subinventory, quantity)
- Click lot/serial tab
- In serial entry window insert start/end serial numbers and click done

## Step 4: review the serial numbers

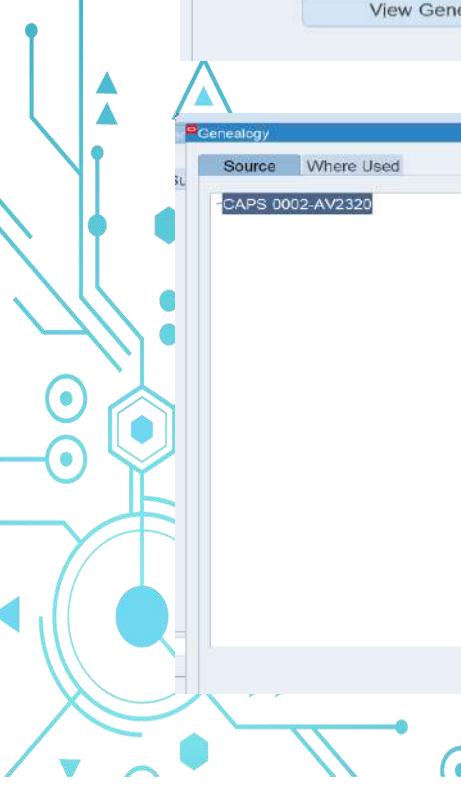
- From on hand quantity (menu) -> serial numbers (sub menu)
- Insert the item then find
- From serial number window click Genealogy tab

Serial	Item	Name	Lot	Serial [ ]
AV2320	CAPS 0002			-
AV2321	CAPS 0002			-
AV2322	CAPS 0002			-
AV2323	CAPS 0002			-
AV2324	CAPS 0002			-
AV2325	CAPS 0002			-
AV2326	CAPS 0002			-
AV2327	CAPS 0002			-
AV2328	CAPS 0002			-
AV2329	CAPS 0002			-

Item Description: Pressure Sensors

View Genealogy      Transactions      Lot

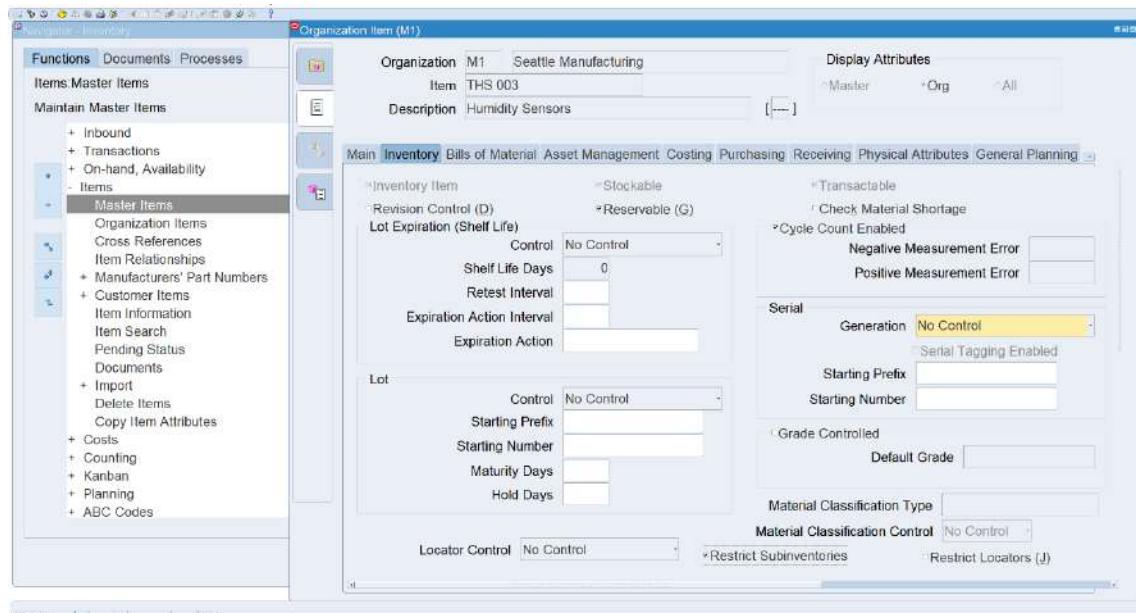


Source Where Used		Work Order Details Serial Details Lot Attributes Material Transactions			
CAPS 0002-AV2320		Item Details: Item CAPS 0002 Pressure Sensors, Organization M1 Seattle Manufacturing, Shelf Life 0, Retest Interval Serial Details: Unit Number, Attributes, Status Active, State Resides in stores, Receipt Date 12-10-2011 11:58:, Current Lot, Job, Operation, Ship Date, Step			

## 24. Inventory Restriction

### Step 1:

- Inventory (responsibility) -> items (menu) -> organization item (sub menu) or master item (sub menu) then from organization assignment (tab) click org attributes
- Search for the item (THIS 003)
- From inventory attribute mark the check box for restrict subinventories then save



Organization M1 Seattle Manufacturing  
 Item THS 003  
 Description Humidity Sensors

**Inventory Item**

Control	No Control
Shelf Life Days	0
Retest Interval	
Expiration Action Interval	
Expiration Action	

**Lot**

Control	No Control
Starting Prefix	
Starting Number	
Maturity Days	
Hold Days	

**Serial**

Generation	No Control
Serial Tagging Enabled	
Starting Prefix	
Starting Number	

**Material Classification**

Material Classification Type	
Material Classification Control	No Control

**Locator Control**

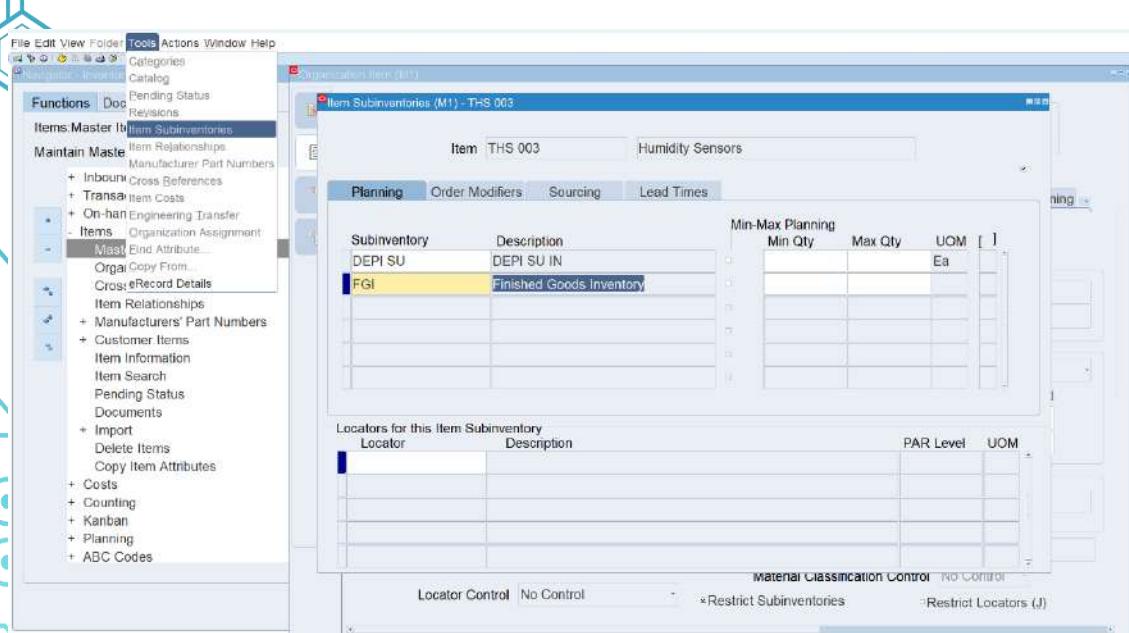
Control	No Control
---------	------------

**Restrictions**

- ✓ Restrict Subinventories
- ✓ Restrict Locators (J)

### Step 2:

- From tools tab -> item sub-inventories
- Insert the sub-inventories where the item can only be transacted then save



Item THS 003 Humidity Sensors

**Planning**

Subinventory	Description
DEPI SU	DEPI SU IN
FGI	Finished Goods Inventory

**Min-Max Planning**

Min Qty	1
Max Qty	1
UOM	Ea

**Locators for this Item Subinventory**

Locator	Description	PAR Level	UOM

**Material Classification Control**

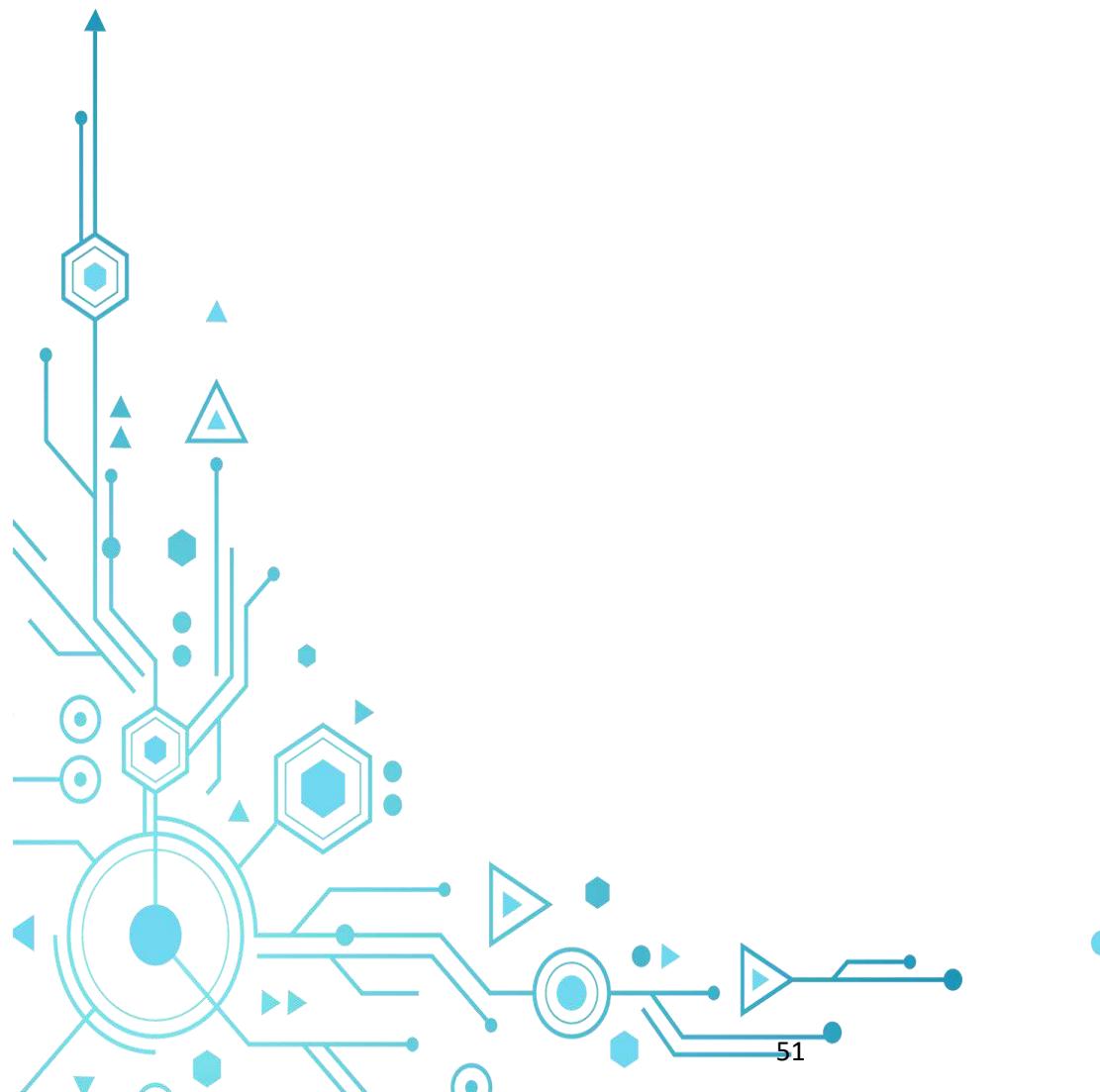
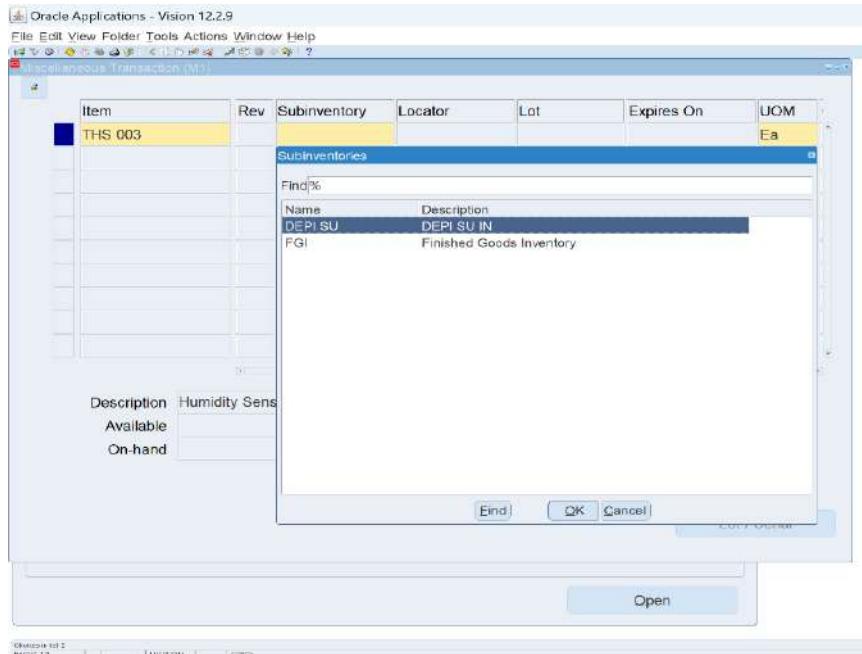
Control	No Control
---------	------------

**Restrictions**

- ✓ Restrict Subinventories
- ✓ Restrict Locators (J)

### Step 3:

- Navigate to Inventory (responsibility) -> Transaction (menu) -> material transaction (sub menu)
- The item is restricted within two sub-inventories (DEPI SU/FGI)



## II. PURCHASING

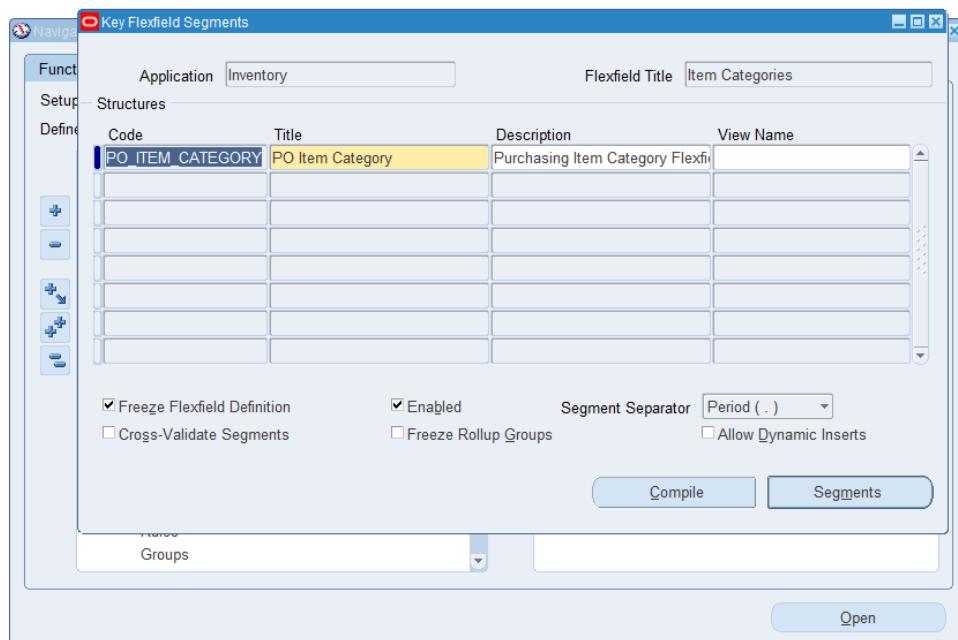


## 1. PO Item Category

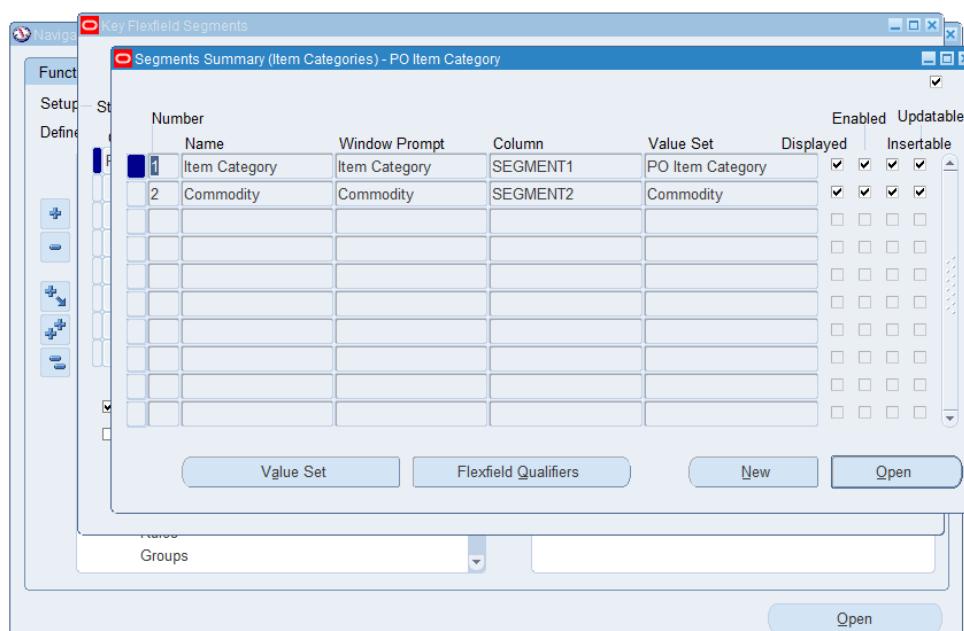
We can define multiple segment structures for the PO Item Categories Flexfield. Each structure corresponds to a different category grouping scheme, and we can associate these structures with the categories and category sets that we defined previously

### Step 1:

- Navigate to setup -> flexfields -> key -> Segments
- Find the PO item category.



- On family segment click value set, the validation type is independent
- On class segment the validation is dependent means its connected with another list of value (family segment)



**Segments (Item Categories) - PO Item Category**

Name	Item Category	Description	Purchasing Category	<input checked="" type="checkbox"/> Enabled	<input checked="" type="checkbox"/> Displayed
Column	SEGMENT1	Number	1	<input checked="" type="checkbox"/> Insertable	<input checked="" type="checkbox"/> Updatable
<input checked="" type="checkbox"/> Indexed					
Validation					
Value Set	PO Item Category	Description	Purchasing Item Category Value Set		
Default Type	Required	Default Value		<input type="checkbox"/> Security Enabled	Range
Sizes					
Display Size	10	Description Size	30		
Concatenated Description Size	30				
Prompts					
List Of Values	Item Category	Window	Item Category		
Value Set      Flexfield Qualifiers					
Groups					
<b>Open</b>					

**Segments (Item Categories) - PO Item Category**

Name	Commodity	Description	Commodity	<input checked="" type="checkbox"/> Enabled	<input checked="" type="checkbox"/> Displayed
Column	SEGMENT2	Number	2	<input checked="" type="checkbox"/> Insertable	<input checked="" type="checkbox"/> Updatable
<input checked="" type="checkbox"/> Indexed					
Validation					
Value Set	Commodity	Description	Commodity Value Set		
Default Type	Required	Default Value		<input type="checkbox"/> Security Enabled	Range
Sizes					
Display Size	10	Description Size	50		
Concatenated Description Size	25				
Prompts					
List Of Values	Commodity	Window	Commodity		
Value Set      Flexfield Qualifiers					
Groups					
<b>Open</b>					

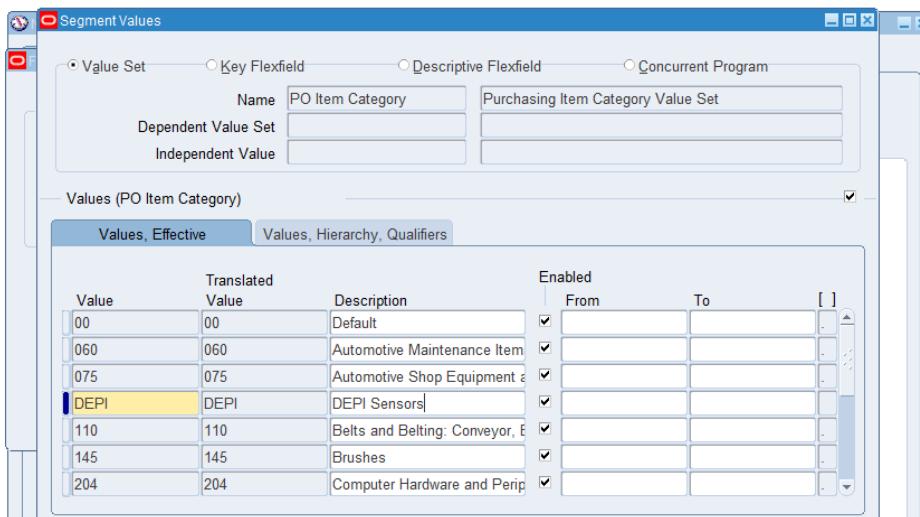
## Step 2:

To define a new PO item category value.

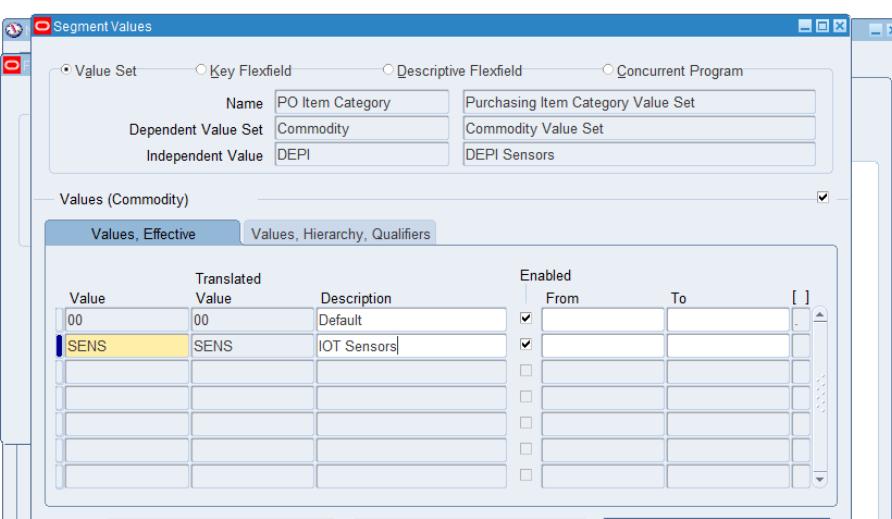
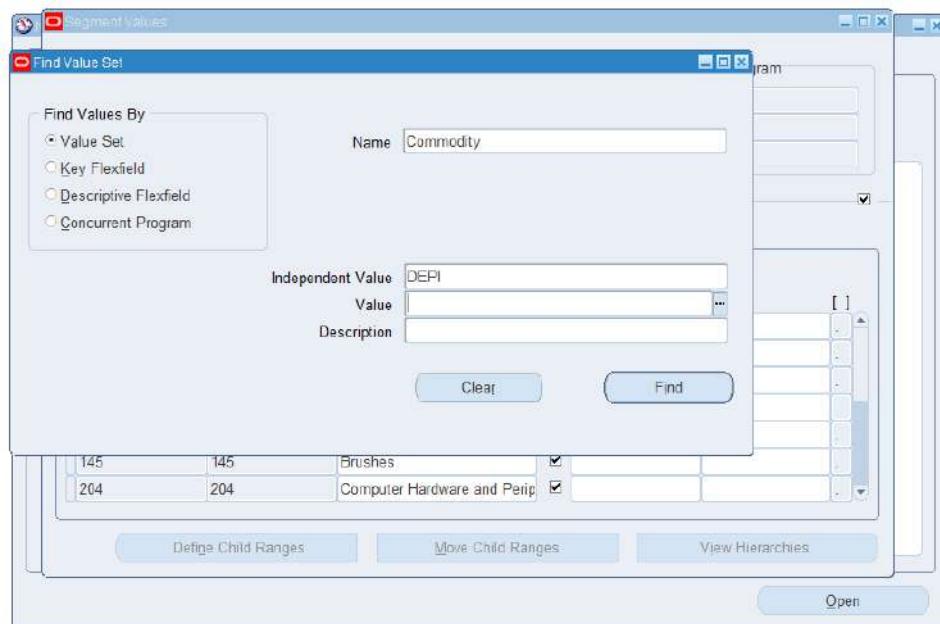
- ▲● Navigate to set up -> flexfields-> key -> values.
- Insert the category values and description then save.

**Segment values**

<input type="radio"/> Value Set	<input checked="" type="radio"/> Key Flexfield	<input type="radio"/> Descriptive Flexfield	<input type="radio"/> Concurrent Program
<b>Find Value Set</b>			
Find Values By	<input checked="" type="radio"/> Value Set <input type="radio"/> Key Flexfield <input type="radio"/> Descriptive Flexfield <input type="radio"/> Concurrent Program		
Value Set	Name: PO Item Category Independent Value: Value Description:		
Value	<input type="button" value="Clear"/> <input type="button" value="Find"/>		
<input type="button" value="Define Child Ranges"/> <input type="button" value="Move Child Ranges"/> <input type="button" value="View Hierarchies"/>			
Groups			
<b>Open</b>			



- Repeat the previous steps to define the commodity values



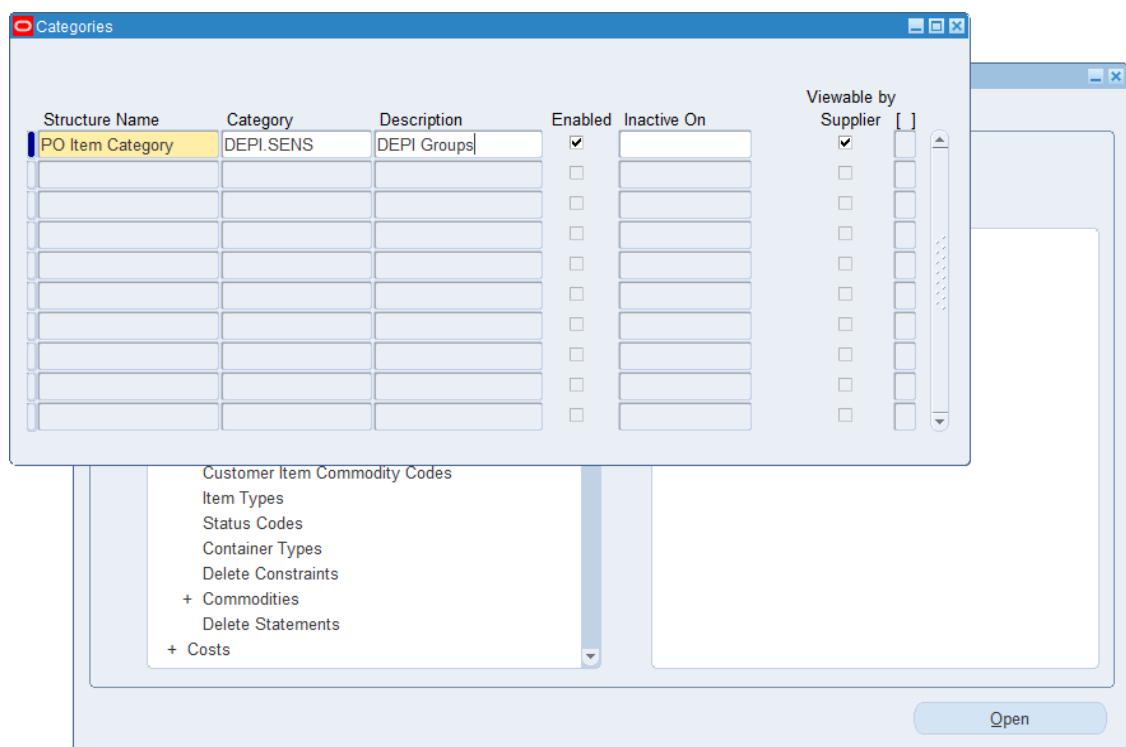
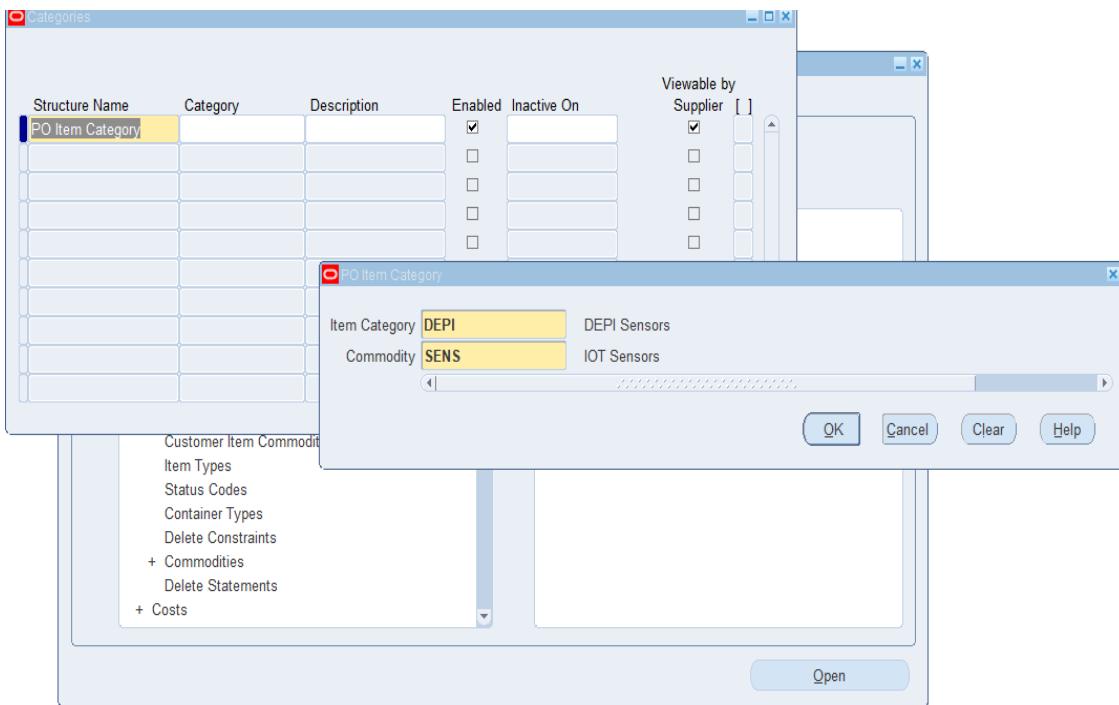
- A request will be run to compile the two new segments
- From view -> requests (the requests are completed, normal)



### Step 3:

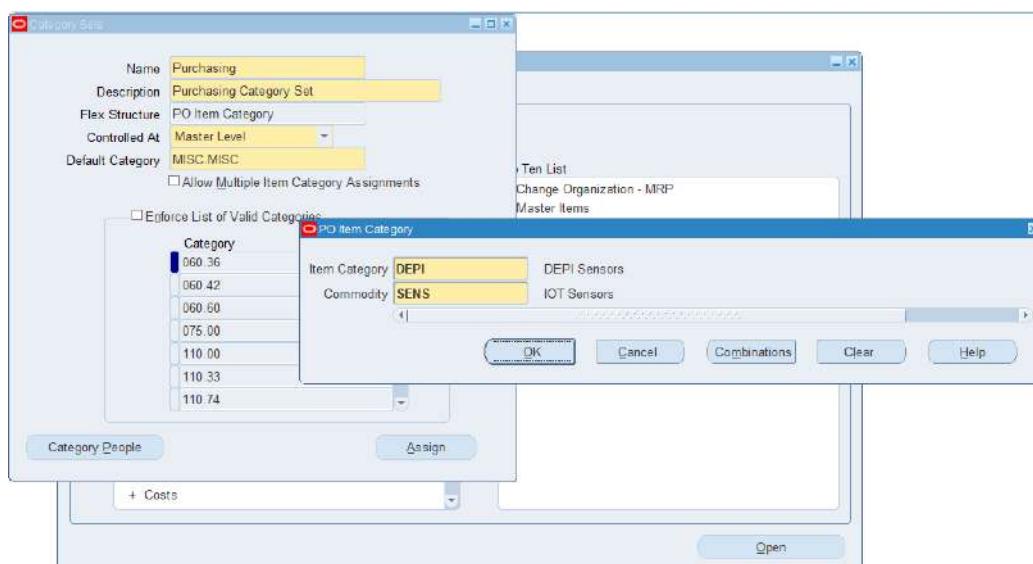
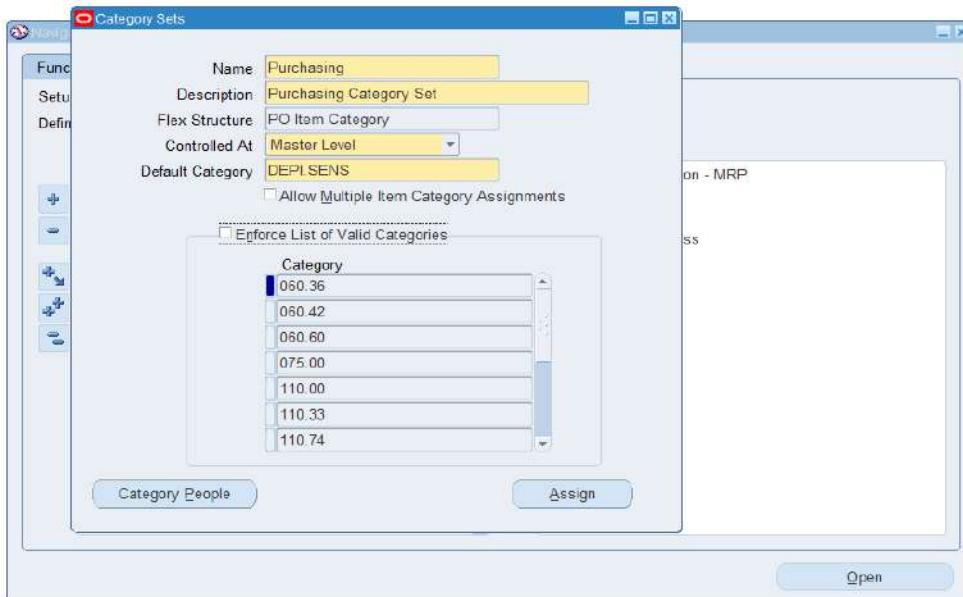
- Navigate to set up -> items-> categories -> category codes
- Click on the new button to create a new category code.
- Insert structure name, category (family, class)
- Click ok & save

The screenshot shows two windows stacked vertically. The top window is titled "Setup.Items:Categories:Category Codes" and has tabs for "Functions", "Documents", and "Processes". It displays a tree structure under "Define Item Categories" with "Category Codes" selected. To the right, there is a "Top Ten List" containing: 1. Change Organization - MRP, 2. Master Items, 3. Templates, 4. Organization Access, 5. Receipts. The bottom window is titled "Categories" and contains a "Find Categories" dialog with fields for "Structure Name", "Category", "Description", and "Inactive On", along with "Clear", "New", and "Find" buttons. To the right of the dialog is a "Viewable by Supplier" checkbox and a list of checkboxes. Both windows have an "Open" button at the bottom right.

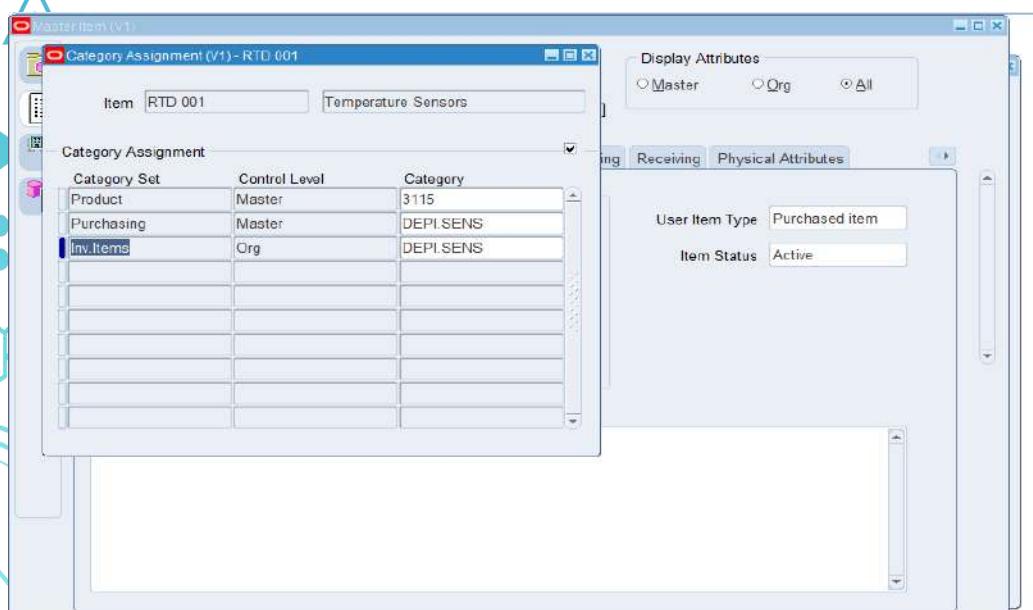


#### Step 4:

- Navigate to set up -> items-> categories -> category sets
- Find the purchasing category set to apply our new category set as the default category.



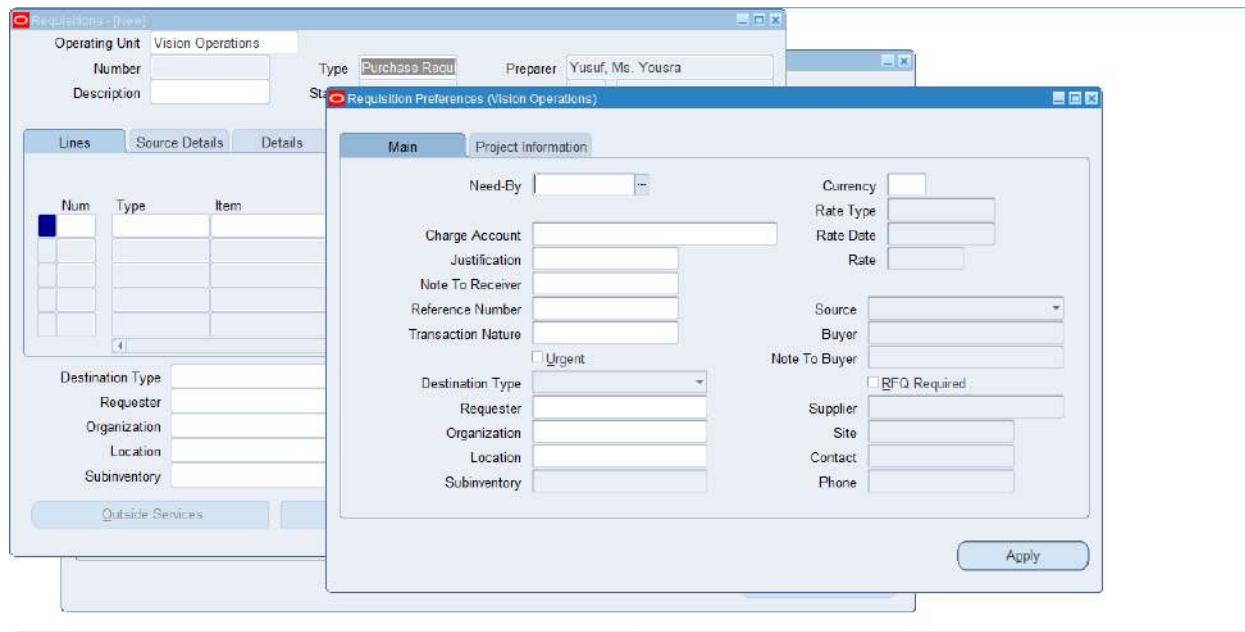
- Any item will enter the inventory will be assigned to the default category (DEPI SENS).
- ▲ The default category (DEPI - SENS) will be applied automatically in any requisition form.



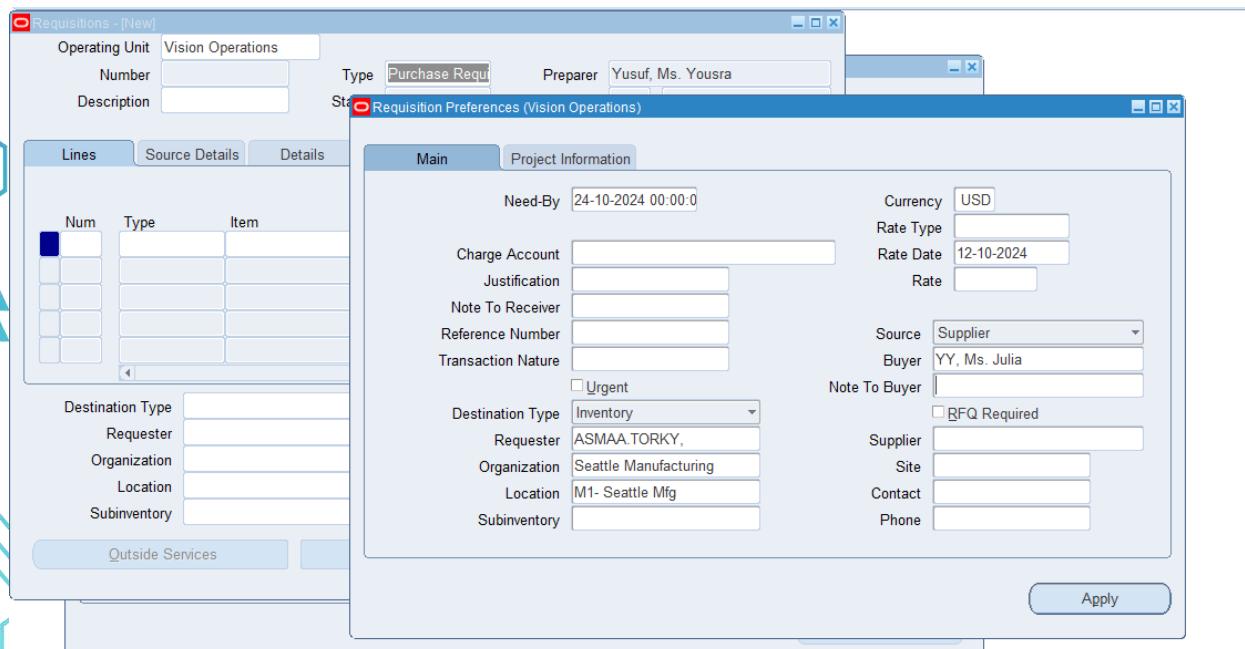
## 2. Tools Preference:

To enter requisition line defaults (including destination, requester, organization, location, sourcing default information, supplier, etc.).

- Navigate to requisitions window -> tools menu -> selecting preferences
- Enter the defaults as shown in the following steps.



- Set your preferences to apply your defaults:
- Select the apply button to apply your defaults.



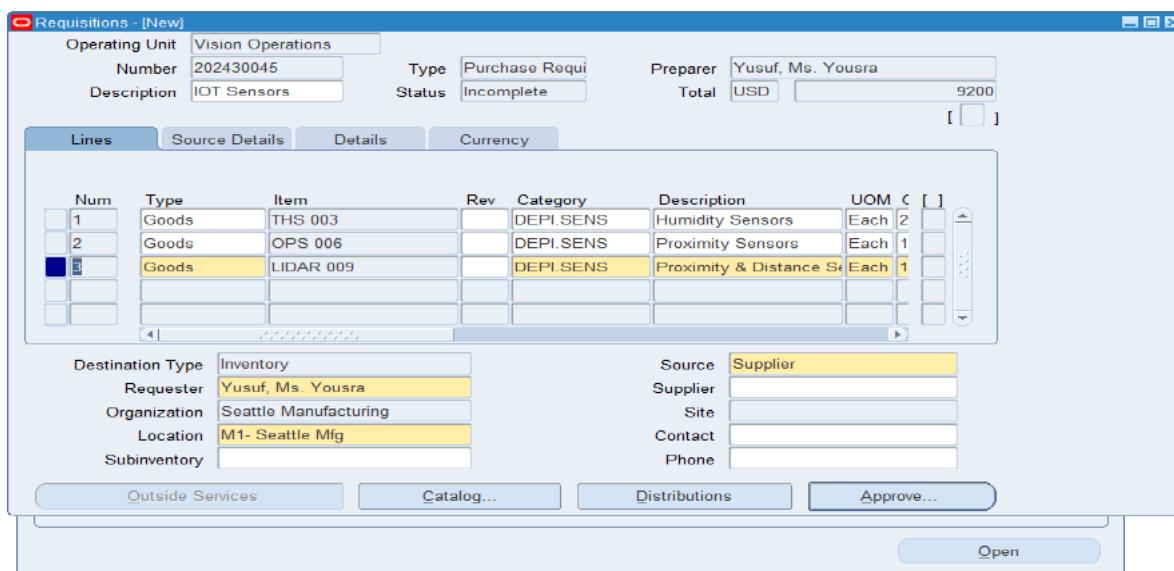


# Sense the Future

### 3. Requisition:

To create a purchase requisition

- Navigate to requisitions
- Click on the lines tab, then insert the required information (item, quantity, price, need by date, etc.,)
- Save and make a note of our requisition number.

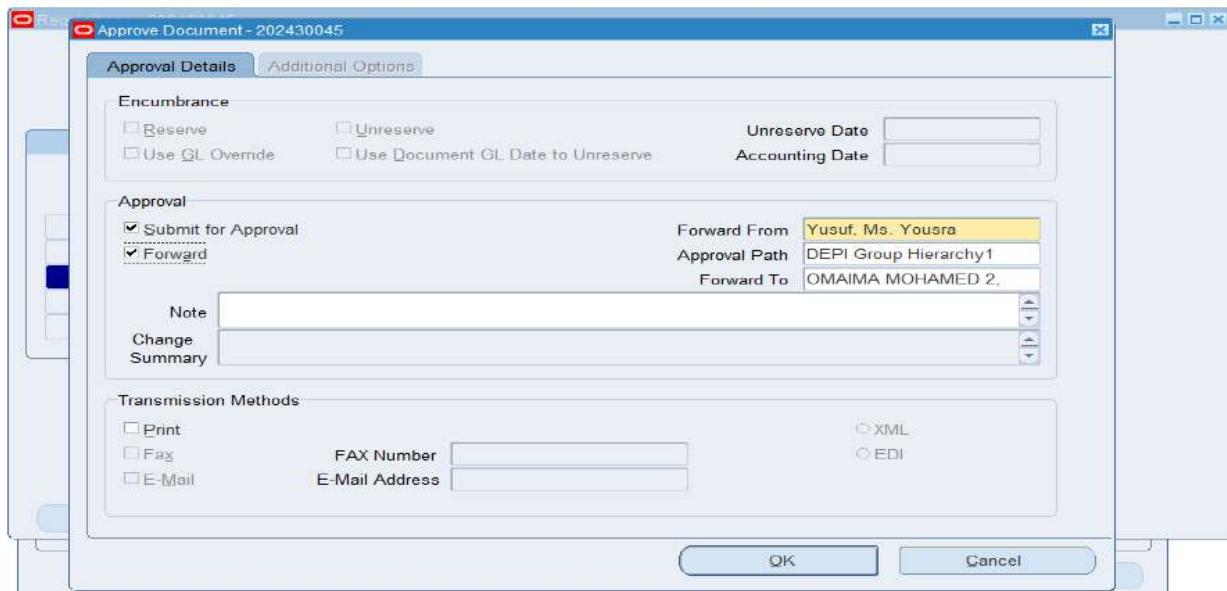


The screenshot shows the 'Requisitions - [New]' window. The top header includes fields for Operating Unit (Vision Operations), Number (202430045), Type (Purchase Requi...), Preparer (Yusuf, Ms. Yousra), Total (USD 9200), and Status (Incomplete). Below the header is a tabs section with 'Lines' selected, followed by 'Source Details', 'Details', and 'Currency'. The 'Lines' tab displays a grid of requisition items:

Num	Type	Item	Rev	Category	Description	UOM	C
1	Goods	THS 003		DEPI.SENS	Humidity Sensors	Each	2
2	Goods	OPS 006		DEPI.SENS	Proximity Sensors	Each	1
3	Goods	LIDAR 009		DEPI.SENS	Proximity & Distance Sensors	Each	1

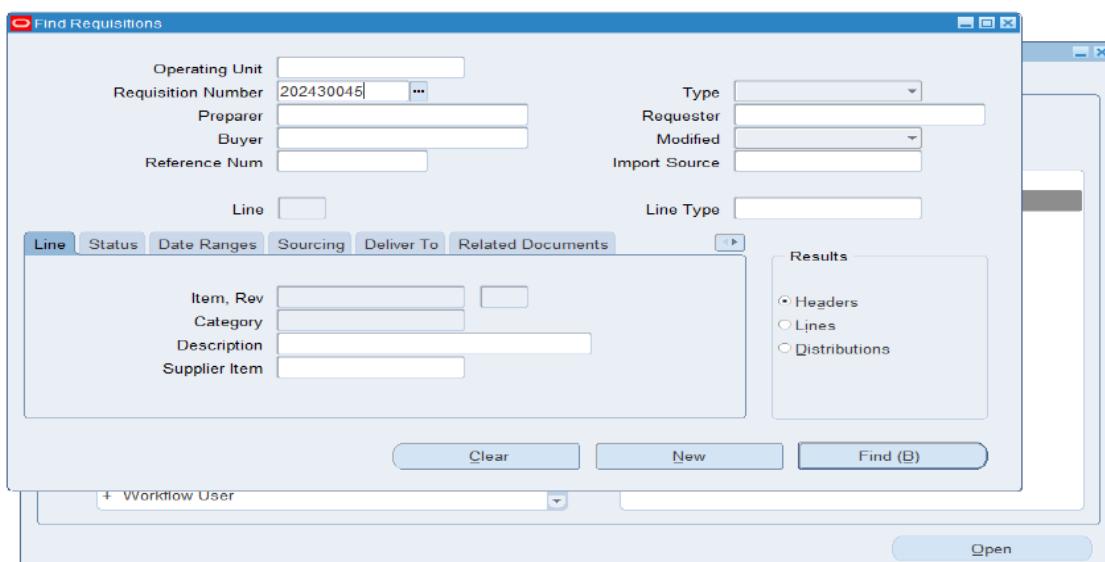
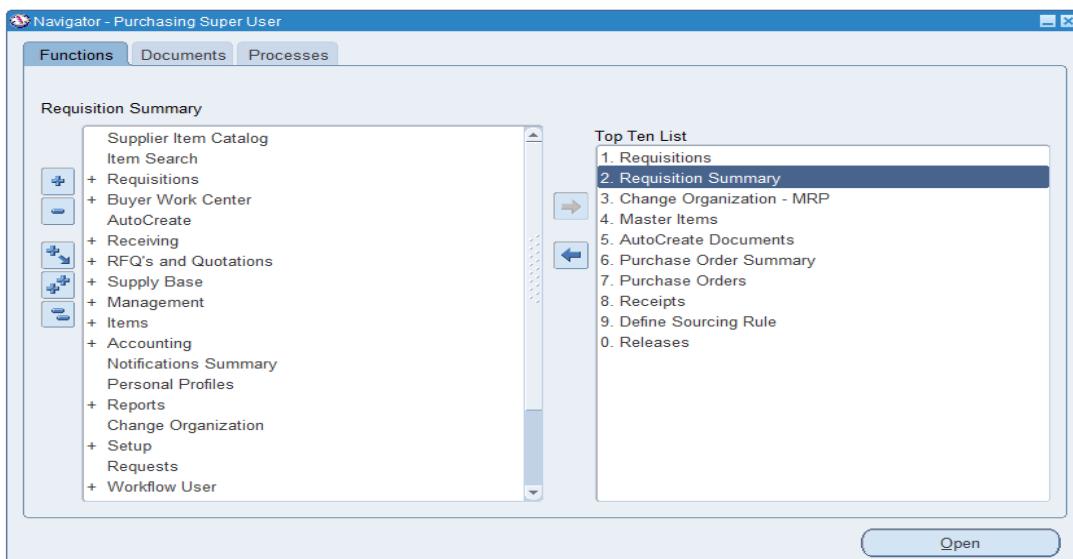
Below the grid, there are sections for Destination Type (Inventory), Requester (Yusuf, Ms. Yousra), Organization (Seattle Manufacturing), Location (M1- Seattle Mfg), Subinventory, Source (Supplier), Supplier, Site, Contact, and Phone. At the bottom are buttons for 'Outside Services', 'Catalog...', 'Distributions', 'Approve...', and 'Open'.

- Select the submit for approval option button.
- Click the approve button to approve the requisition.
- Ok.

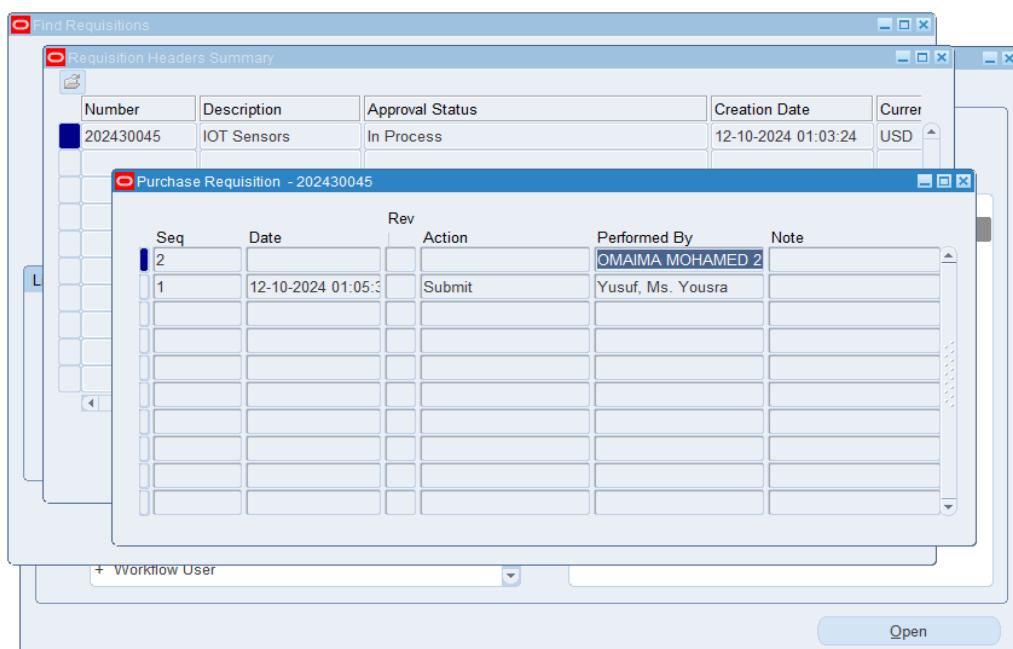


The screenshot shows the 'Approve Document - 202430045' window. It has tabs for 'Approval Details' and 'Additional Options'. Under 'Approval Details', there are sections for 'Encumbrance' (checkboxes for Reserve, Use GL Override, Unreserve, Use Document GL Date to Unreserve) and 'Approval' (checkboxes for Submit for Approval, Forward, and a note field for Change Summary). It also includes fields for Forward From (Yusuf, Ms. Yousra), Approval Path (DEPI Group Hierarchy1), Forward To (OMAIMA MOHAMED 2), Transmission Methods (Print, Fax, E-Mail), FAX Number, E-Mail Address, and XML/EDI options. At the bottom are 'OK' and 'Cancel' buttons.

- Open Requisition Summary form to find the requisition status



- To find the next person requisition needs his approval.



**Warning**  
You are running this application with an obsolete look and feel (appearance setting) and/or an unsupported browser version. As a result, application pages may not work correctly. Please contact your system administrator for assistance.

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- [Purchasing Super User](#)
- [Receivables Manager](#)
- [System Administrator](#)

**Worklist**

From	Type	Subject	Sent	Due
Yusuf, Yousra	PO Requisition Approval	Purchase Requisition 202430045 for Yusuf, Yousra (9,200.00 USD)	12-10-2024	
OMAIMA MOHAMED 2	PO Approval	Standard Purchase Order 202440042 has been approved	11-10-2024	
OMAIMA MOHAMED 2	PO Approval	Standard Purchase Order 202440041 has been approved	11-10-2024	
OMAIMA MOHAMED 2	PO Approval	Standard Purchase Order 202440034 has been approved	01-09-2024	
	PO Approval Error	Approval workflow database error occurs while approving Purchase Requisition 202430035	01-09-2024	
OMAIMA MOHAMED 2	PO Requisition Approval	Purchase Requisition 202430035 has been approved	01-09-2024	
OMAIMA MOHAMED 2	PO Approval	Standard Purchase Order 202440032 has been approved	31-08-2024	
	PO Approval Error	Approval workflow database error occurs while approving Purchase Requisition 202430033	31-08-2024	
OMAIMA MOHAMED 2	PO Requisition Approval	Purchase Requisition 202430033 has been approved	31-08-2024	
	PO Approval Error	Approval workflow database error occurs while approving Purchase Requisition		

**Home >**

### Purchase Requisition 202430045 for Yusuf, Yousra (9,200.00 USD)

From Yusuf, Yousra  
To OMAIMA MOHAMED 2  
Sent 12-10-2024 01:05:32  
ID 8270000

Description IOT Sensors  
Total 9,200.00 USD  
Tax (Non Recoverable) 0.00 USD  
Attachments

### Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)	Charge Account
1	Humidity Sensors		000	Each	200	12	2,400.00	01-000-1410-0000-000
2	Proximity Sensors		000	Each	120	30	3,600.00	01-000-1410-0000-000
3	Proximity & Distance Sensors		000	Each	100	32	3,200.00	01-000-1410-0000-000

### Approval Sequence

Num	Name	Action	Action Date	Note
	OMAIMA MOHAMED 2	In Process		

**Warning**  
You are running this application with an obsolete look and feel (appearance setting) and/or an unsupported browser version. As a result, application pages may not work correctly. Please contact your system administrator for assistance.

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- [Order Management Super User, Vision Operations \(USA\)](#)
- [Purchasing Super User](#)
- [Receivables Manager](#)
- [System Administrator](#)

**Worklist**

From	Type	Subject	Sent	Due
OMAIMA MOHAMED 2	PO Approval	Standard Purchase Order 202440042 has been approved	11-10-2024	
OMAIMA MOHAMED 2	PO Approval	Standard Purchase Order 202440041 has been approved	11-10-2024	
OMAIMA MOHAMED 2	PO Approval	Standard Purchase Order 202440034 has been approved	01-09-2024	
	PO Approval Error	Approval workflow database error occurs while approving Purchase Requisition 202430035	01-09-2024	
OMAIMA MOHAMED 2	PO Requisition Approval	Purchase Requisition 202430035 has been approved	01-09-2024	
OMAIMA MOHAMED 2	PO Approval	Standard Purchase Order 202440032 has been approved	31-08-2024	
	PO Approval Error	Approval workflow database error occurs while approving Purchase Requisition 202430033	31-08-2024	
OMAIMA MOHAMED 2	PO Requisition Approval	Purchase Requisition 202430033 has been approved	31-08-2024	
	PO Approval Error	Approval workflow database error occurs while approving Purchase Requisition 202430031	31-08-2024	



Sense the Future



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## 4. Multi-functional currency:

- The concept of multi-functional currency allows organizations to manage transactions in multiple currencies within their financial systems. This is particularly useful for companies operating in different countries or dealing with international clients.
- Organizations can define multiple functional currencies for different subsidiaries or business units.
- For new requisitions, the initial default is the functional currency specified in the financials options window. We can specify a different suggested foreign currency for each requisition line.

**Requisitions - [New]**

Operating Unit	Vision Operations	Type	Purchase Requi	Preparer	Yusuf, Ms. Yousra
Number		Status	Incomplete	Total	USD 2000
Description	Temperature Sensc	[ ]			

**Lines**   **Source Details**   **Details**   **Currency**

Num	Type	Item	Rev	Category	Description	UOM	C [ ]
1	Goods	RTD 0001		DEPI.SENS	Temperature Sensors	Each	1
[ ]							

**Destination Type**: Inventory   **Source**: Supplier  
**Requester**: Yusuf, Ms. Yousra   **Supplier**: Winters Supply Company  
**Organization**:   **Site**: EUREKA  
**Location**: M1- Seattle Mfg   **Contact**:  
**Subinventory**:   **Phone**:

Outside Services   Catalog...   Distributions   Approve...

**Requisitions - [New]**

Operating Unit	Vision Operations	Type	Purchase Requi	Preparer	Yusuf, Ms. Yousra
Number		Status	Incomplete	Total	USD 2000
Description	Temperature Sensc	[ ]			

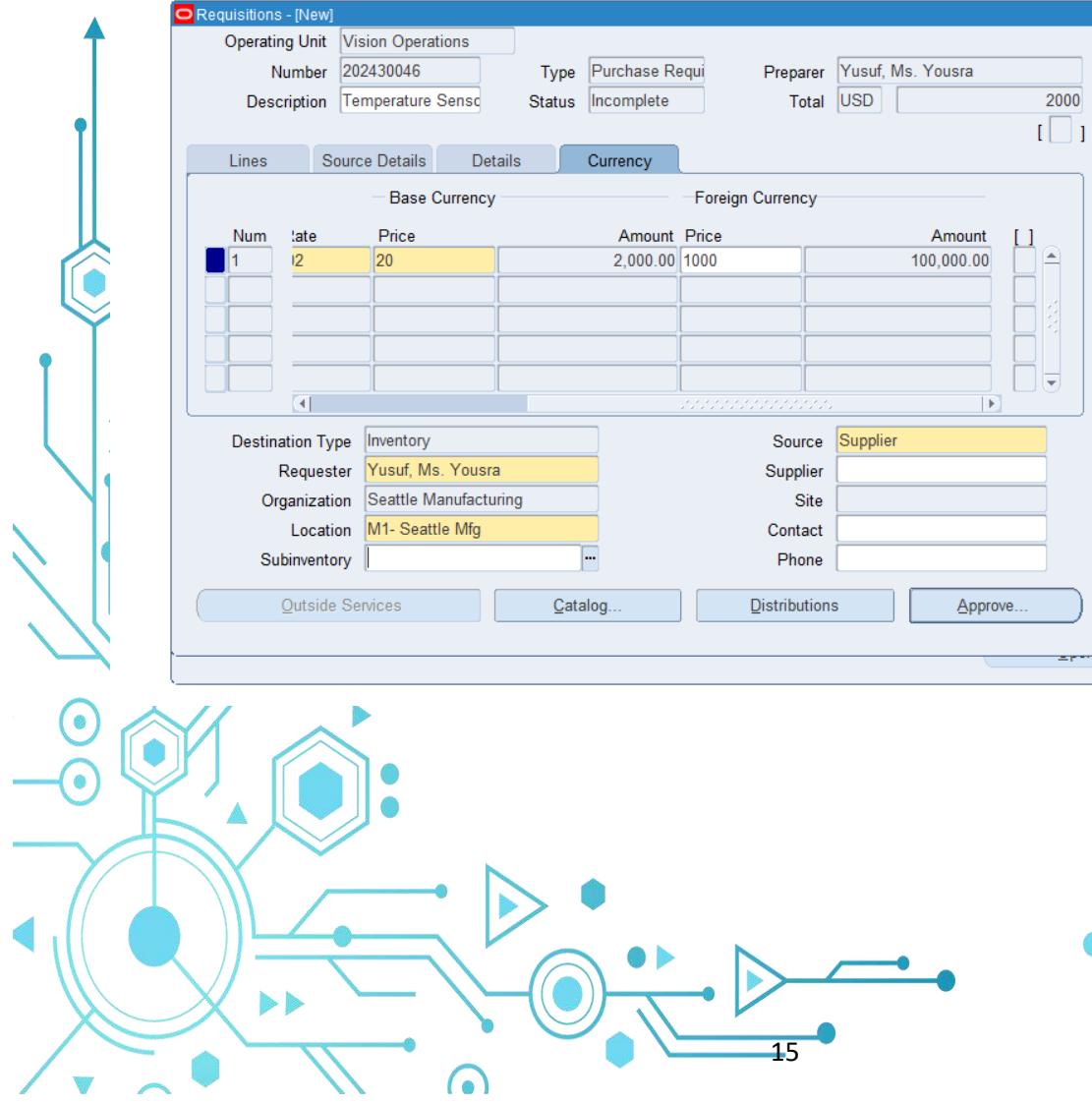
**Lines**   **Source Details**   **Details**   **Currency**

Num	Rate Type	Rate Date	Rate	Base Currency	
				Price	Amount
1	User	12-10-2024	.02	20	2,000.0
[ ]					

**Destination Type**: Inventory   **Source**: Supplier  
**Requester**: Yusuf, Ms. Yousra   **Supplier**: Winters Supply Company  
**Organization**:   **Site**: EUREKA  
**Location**: M1- Seattle Mfg   **Contact**:  
**Subinventory**:   **Phone**:

Outside Services   Catalog...   Distributions   Approve...

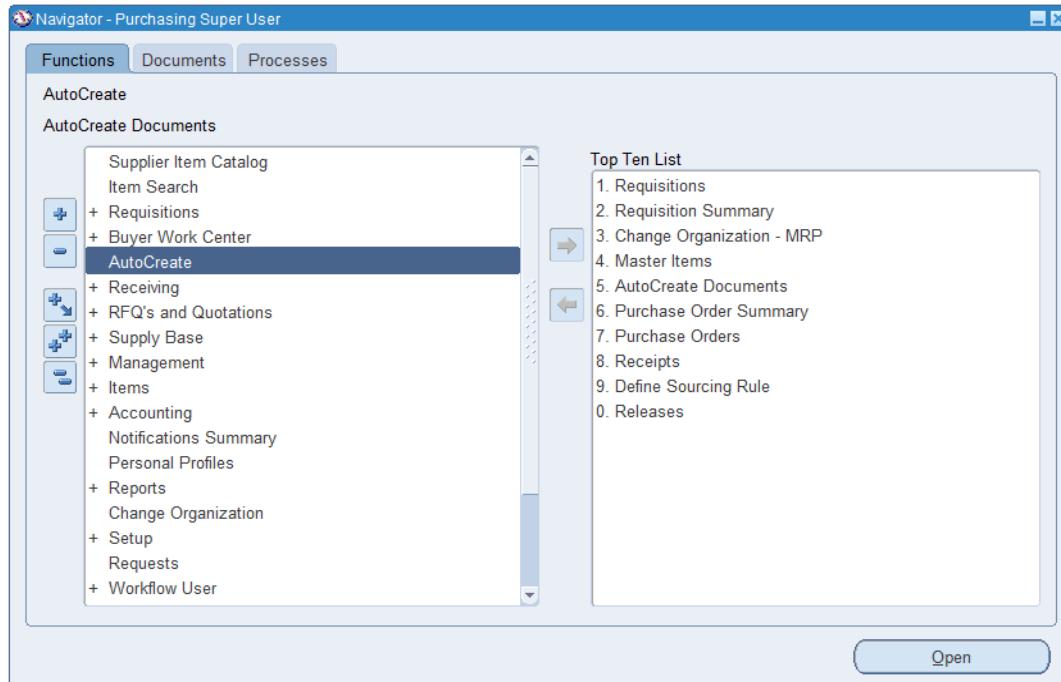
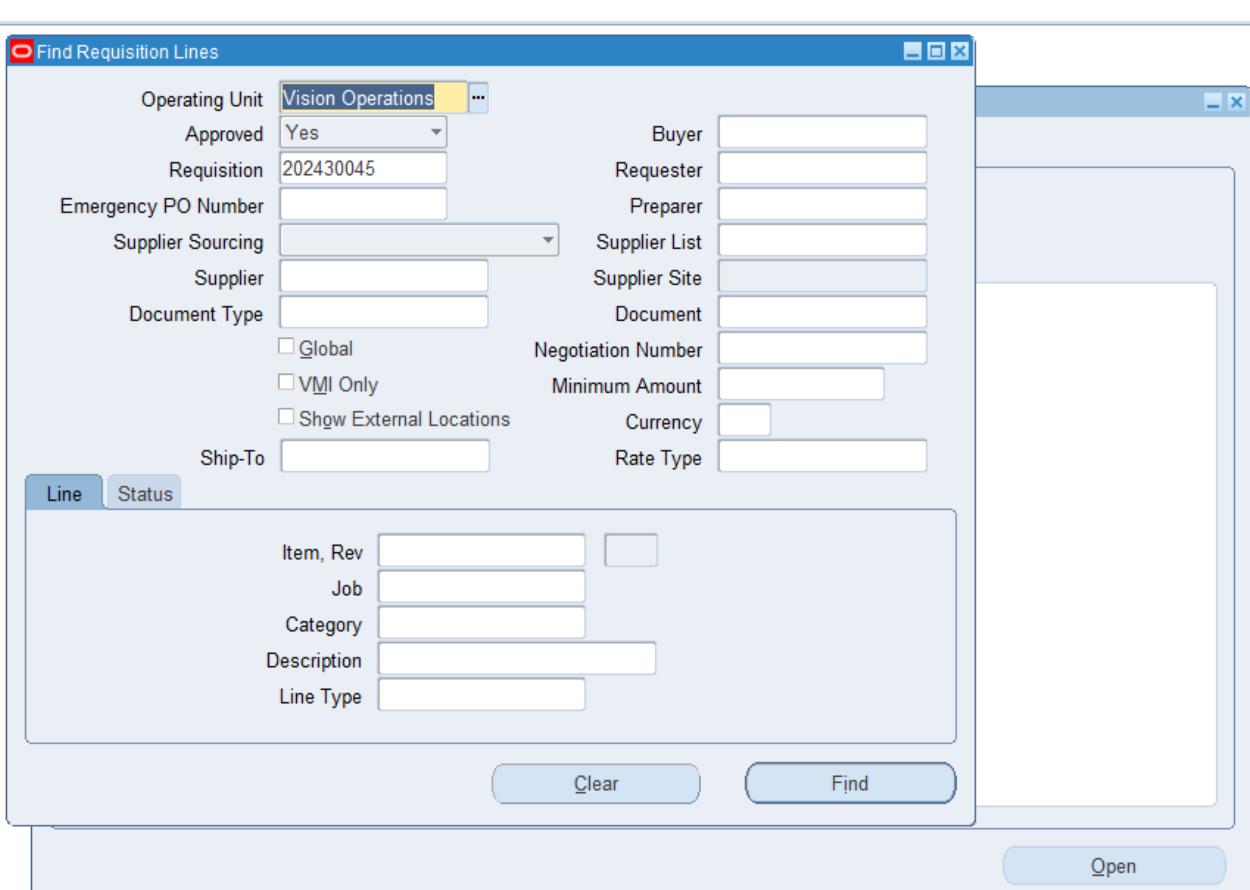
- Oracle allows to set up and maintain exchange rates for converting between currencies.
  - We can define spot rates, user rates, and corporate rates based on our needs.



## 5. Return Requisition:

### Step 1:

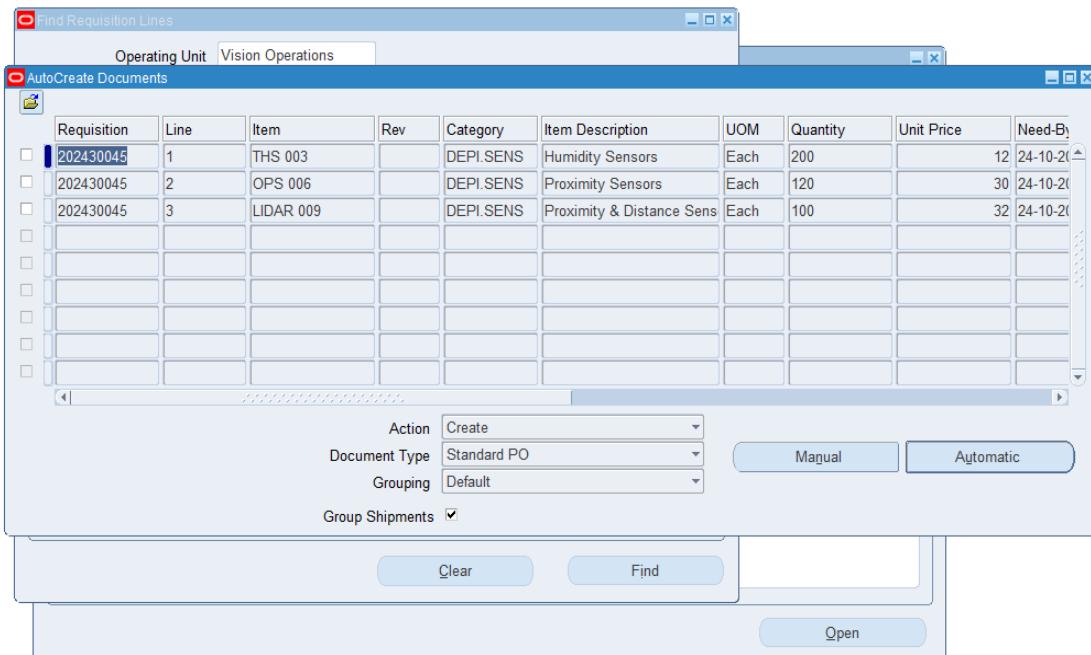
- Navigate to the AutoCreate
- Enter requisition number.

The screenshot shows the 'Find Requisition Lines' dialog box. It contains several search criteria fields:

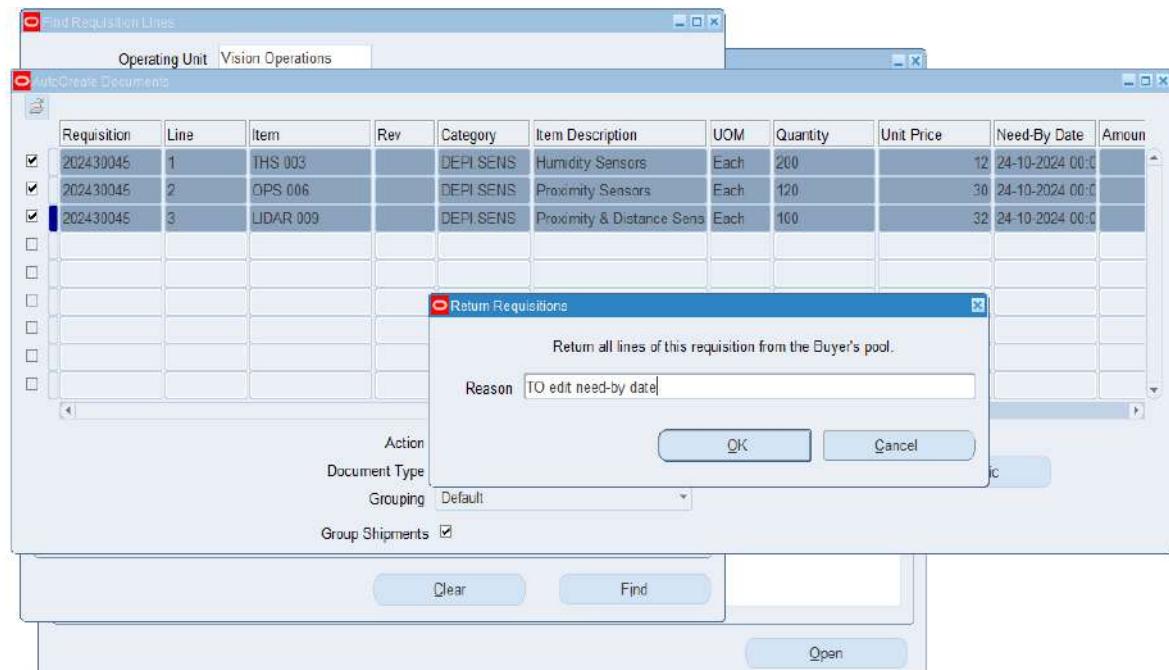
- Operating Unit: Vision Operations
- Approved: Yes
- Requisition: 202430045
- Emergency PO Number: (empty)
- Supplier Sourcing: (empty)
- Supplier: (empty)
- Document Type: (empty)
- Global: (unchecked)
- VMI Only: (unchecked)
- Show External Locations: (unchecked)
- Ship-To: (empty)
- Buyer: (empty)
- Requester: (empty)
- Preparer: (empty)
- Supplier List: (empty)
- Supplier Site: (empty)
- Document: (empty)
- Negotiation Number: (empty)
- Minimum Amount: (empty)
- Currency: (empty)
- Rate Type: (empty)
- Line: Line Status: Line
- Item, Rev: (empty)
- Job: (empty)
- Category: (empty)
- Description: (empty)
- Line Type: (empty)

At the bottom of the dialog are 'Clear' and 'Find' buttons, and an 'Open' button at the bottom right.



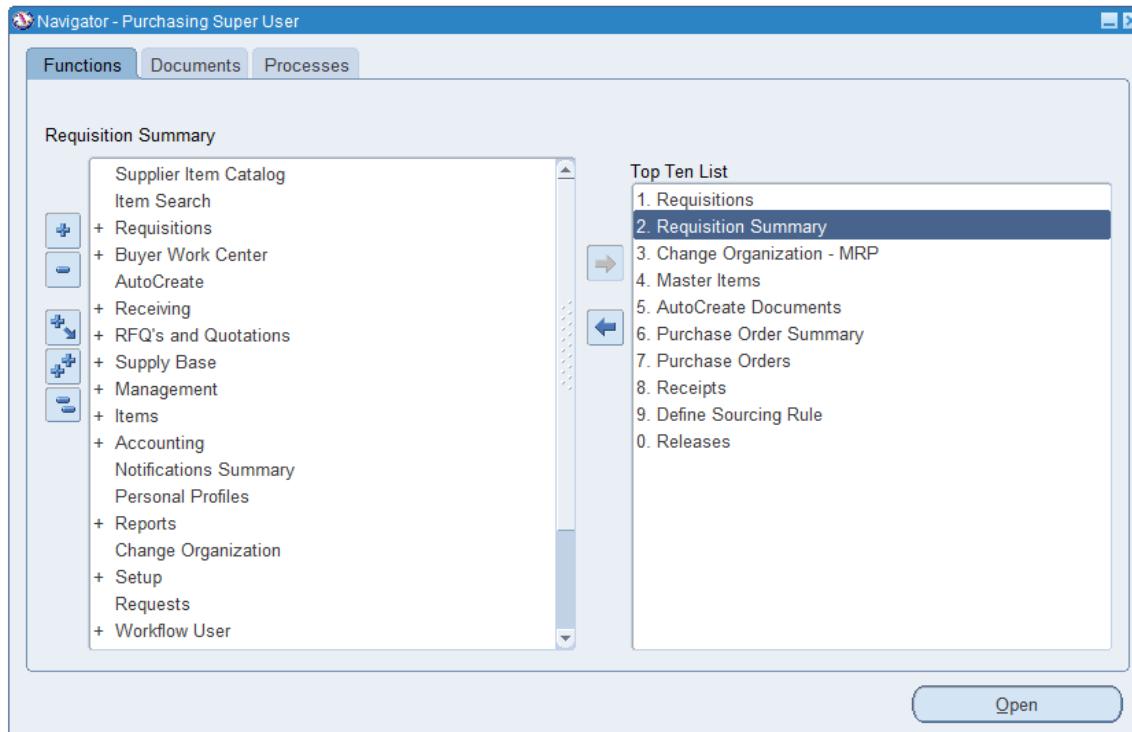
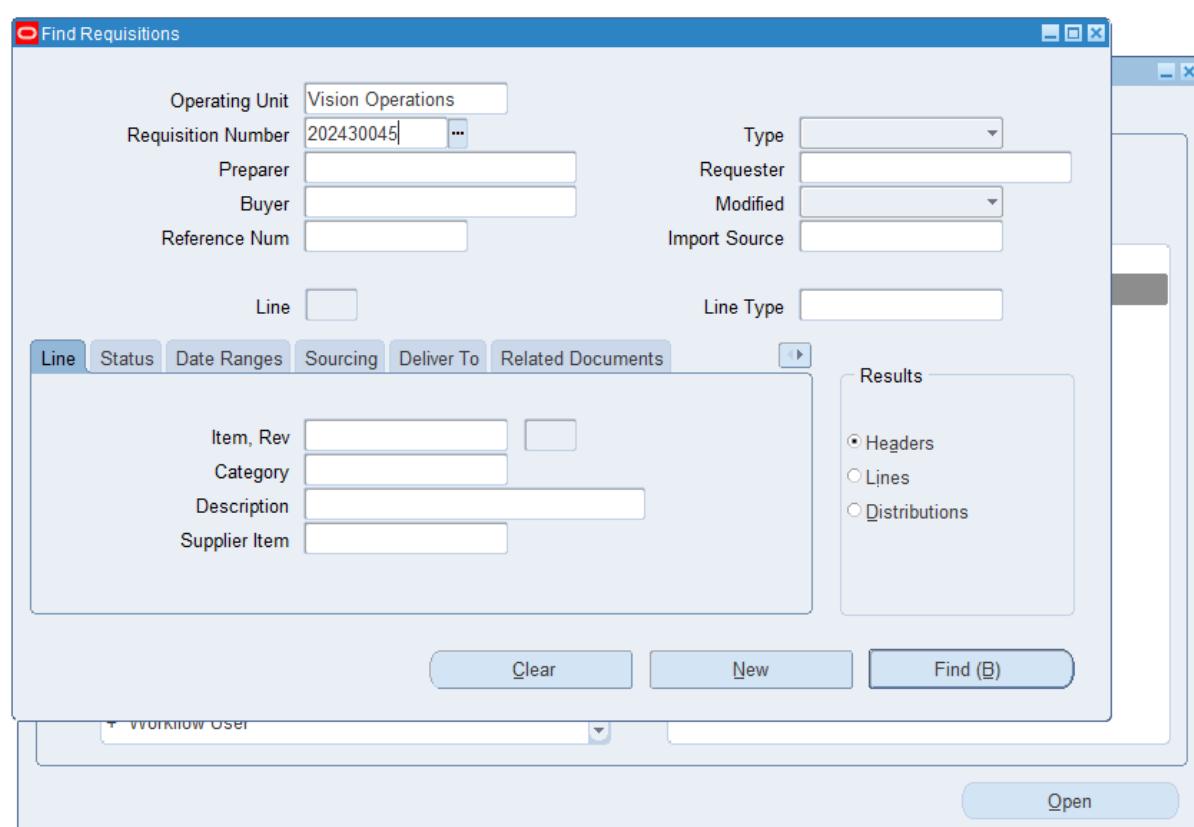
## Step 2:

- Select return requisitions on the tools menu to display the return requisitions window.
- In the reason field, enter a reason for returning the requisition.
- Select OK to return to the requisition.



### Step 3:

- Navigate to Requisitions -> Requisition Summary
- Ensure that the requisition status is updated accordingly (marked as returned).

The screenshot shows the 'Find Requisitions' dialog box. It includes fields for 'Operating Unit' (set to 'Vision Operations'), 'Requisition Number' (set to '202430045'), 'Preparer', 'Buyer', 'Reference Num', 'Type', 'Requester', 'Modified', 'Import Source', 'Line Type', and 'Line'. Below these are tabs for 'Line', 'Status', 'Date Ranges', 'Sourcing', 'Deliver To', and 'Related Documents'. A large search area contains fields for 'Item, Rev', 'Category', 'Description', and 'Supplier Item'. On the right, there is a 'Results' section with radio buttons for 'Headers', 'Lines', and 'Distributions'. At the bottom are 'Clear', 'New', and 'Find (F)' buttons, along with a 'Workflow User' dropdown and an 'Open' button.

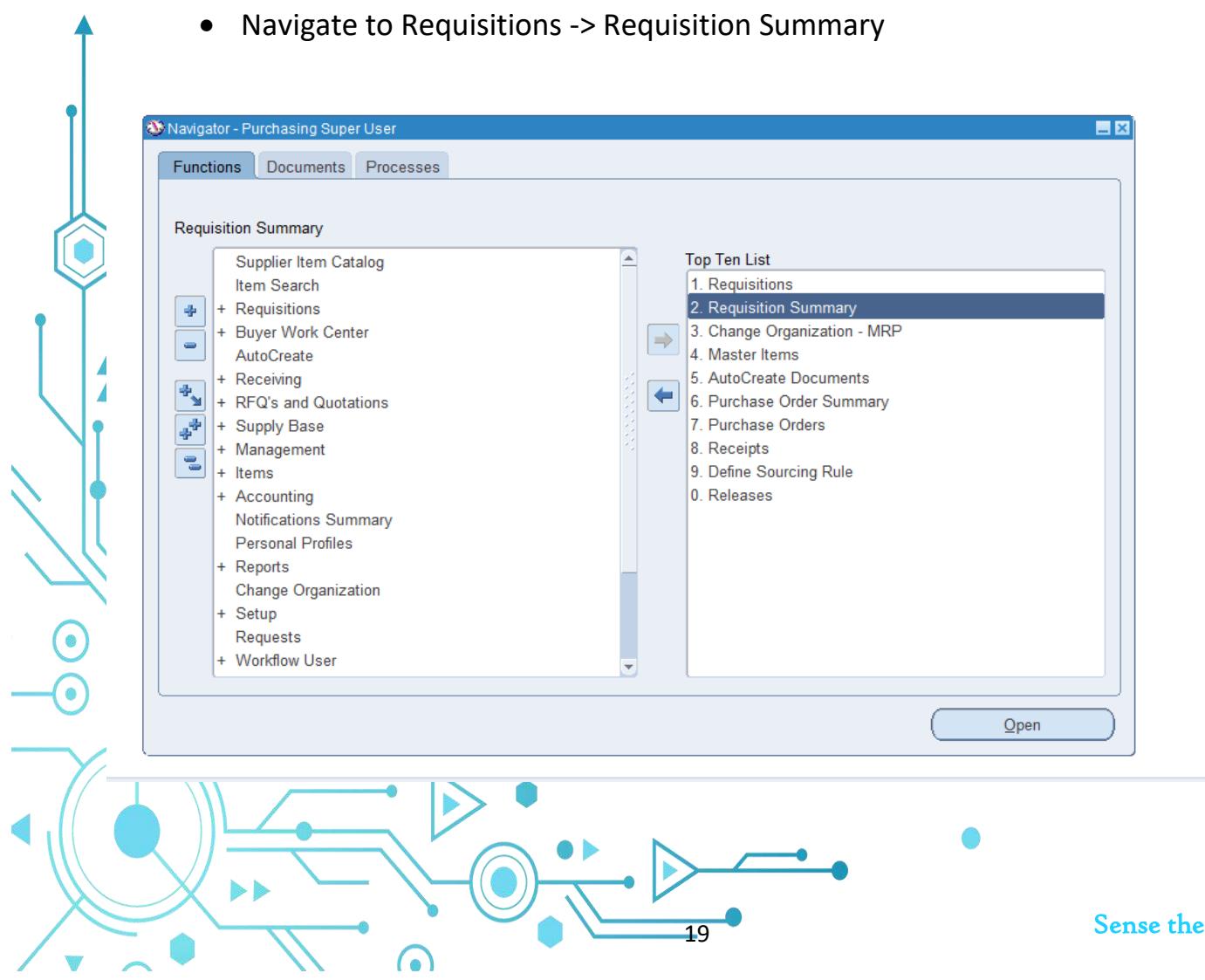


Sense the Future

## **6. Cancel Requisition:**

## **Step 1:**

- Navigate to Requisitions -> Requisition Summary



**Find Requisitions**

Operating Unit	Vision Operations	Type	<input type="button" value="▼"/>
Requisition Number	202430045	Requester	<input type="button" value="▼"/>
Preparer	<input type="text"/>	Modified	<input type="button" value="▼"/>
Buyer	<input type="text"/>	Import Source	<input type="button" value="▼"/>
Reference Num	<input type="text"/>		
Line	<input type="button" value="□"/>	Line Type	<input type="button" value="□"/>
<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="▶"/>			
Item, Rev <input type="text"/> <input type="button" value="□"/> Category <input type="text"/> Description <input type="text"/> Supplier Item <input type="text"/>		<b>Results</b> <input checked="" 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)"/>			

+ Workflow User

- From Tools -> Control-> Cancel Requisition/ Finally Closed

**Control Document - 202430045**

**Cancel Requisition**  
Finally Close

Reason: It'll be replaced by another one based on the production p.

+ Workflow User

**Control Document - 202430045**

**Cancel Requisition**  
Finally Close

Reason: It'll be replaced by another one based on the production p.

**Caution**  
Once the document is Cancelled, it cannot be undone.. Do you want to proceed?

+ Workflow User

**Find Requisitions**   **Control Document - 202430045**

**Requisition**

Number	202430045
--------	-----------

**Actions**

Cancel Requisition  
Finally Close

**Reason** It'll be replaced by another one based on the production p

**Note**

Control Action is completed successfully. Please requery to see the changes.

**OK**   **Cancel**

**Line**

+ Workflow User   Open

**Find Requisitions**   **Requisition Headers Summary**

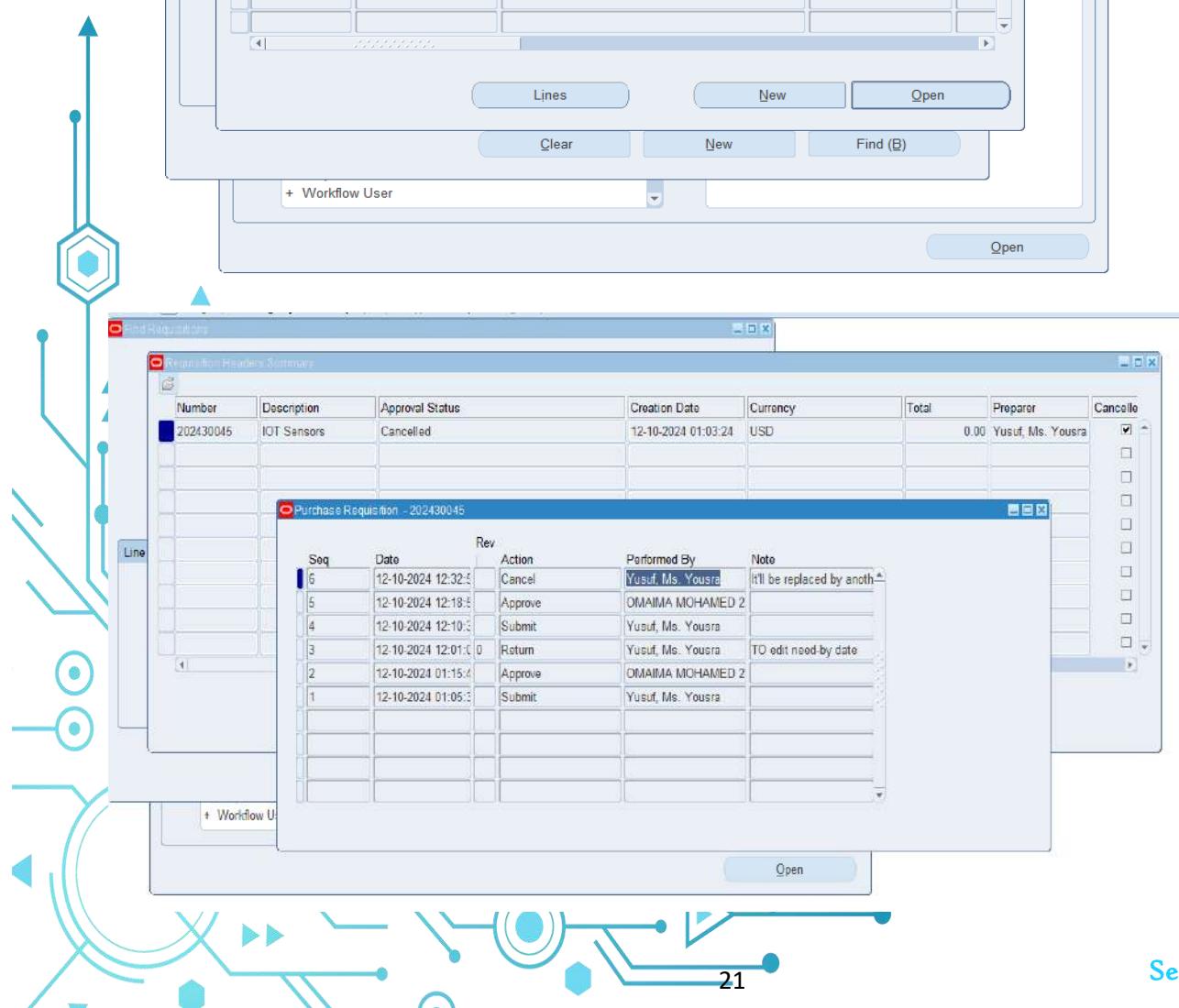
Number	Description	Approval Status	Creation Date	Currency
202430045	IOT Sensors	Cancelled	12-10-2024 01:03:24	USD

**Line**

**Lines**   **New**   **Open**

**Clear**   **New**   **Find (B)**

+ Workflow User   Open

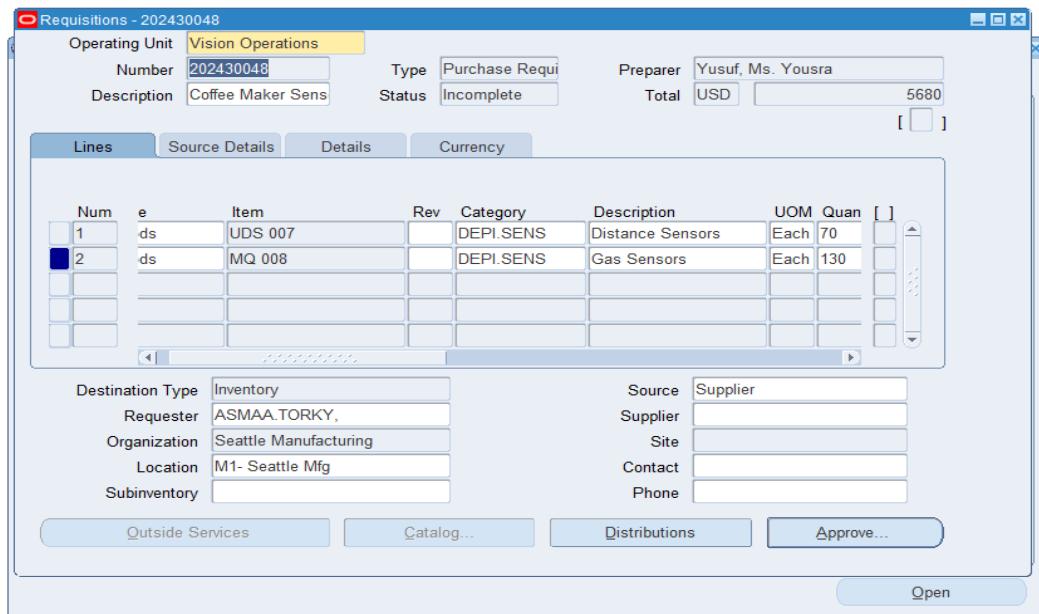


## 7. AutoCreate a PO from Requisition:

TO AutoCreate a standard purchase order

### Step 1:

- After creating a requisition and confirming that its status is 'Approved'



Requisitions - 202430048

Operating Unit: Vision Operations  
Number: 202430048  
Type: Purchase Requi  
Preparer: Yusuf, Ms. Yousra  
Description: Coffee Maker Sens  
Status: Incomplete  
Total: USD 5680

Lines Source Details Details Currency

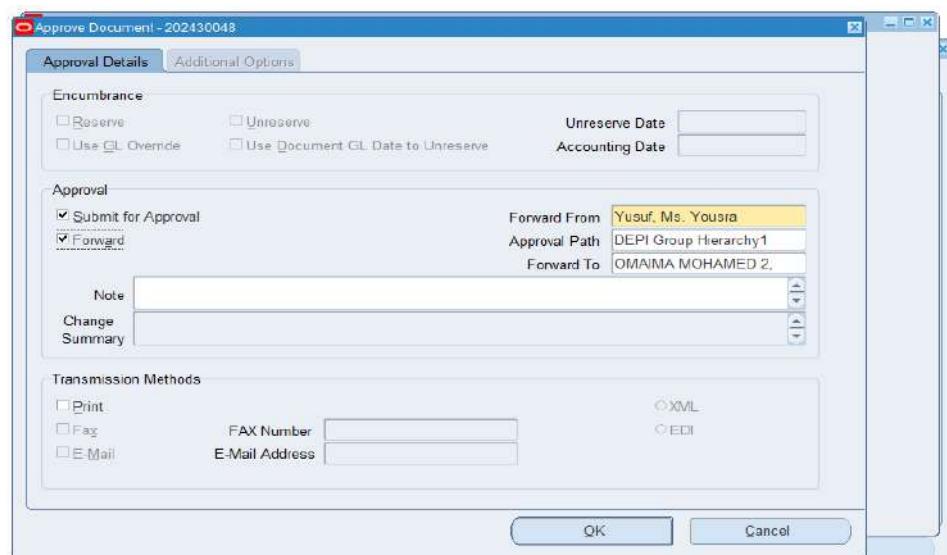
Num	e	Item	Rev	Category	Description	UOM	Quan
1	ds	UDS 007		DEPI.SENS	Distance Sensors	Each	70
2	ds	MQ 008		DEPI.SENS	Gas Sensors	Each	130

Destination Type: Inventory  
Requester: ASMAA.TORKY.  
Organization: Seattle Manufacturing  
Location: M1- Seattle Mfg  
Subinventory:

Source: Supplier  
Supplier:  
Site:  
Contact:  
Phone:

Outside Services Catalog... Distributions Approve...

Open



Approve Document - 202430048

Approval Details Additional Options

Encumbrance

Approval

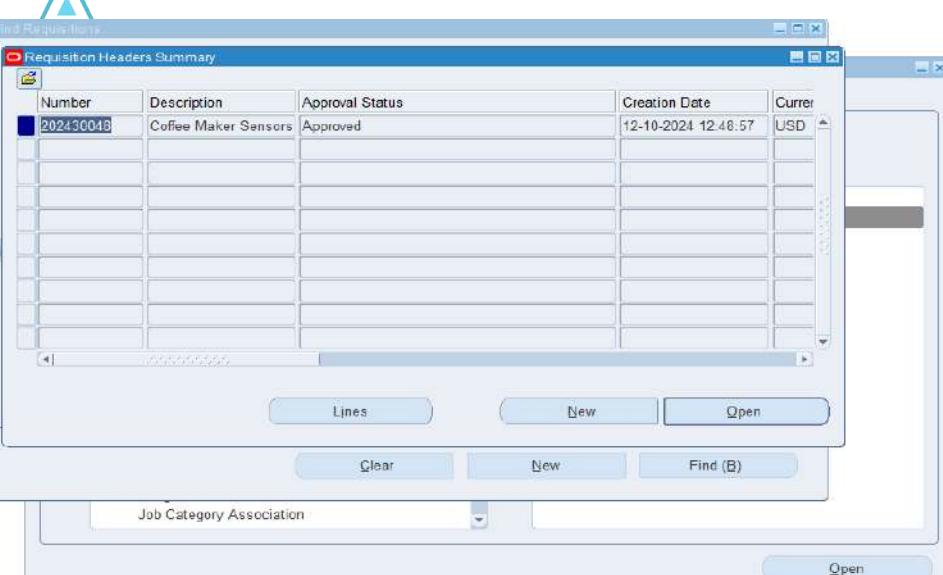
Forward From: Yusuf, Ms. Yousra  
Approval Path: DEPI Group Hierarchy1  
Forward To: OMAIMA MOHAMED 2.

Note:   
Change Summary:

Transmission Methods

Print FAX Number XML  
Flag E-Mail Address EDI

OK Cancel



Find Requisitions

Requisition Headers Summary

Number	Description	Approval Status	Creation Date	Curre
202430048	Coffee Maker Sensors	Approved	12-10-2024 12:48:57	USD

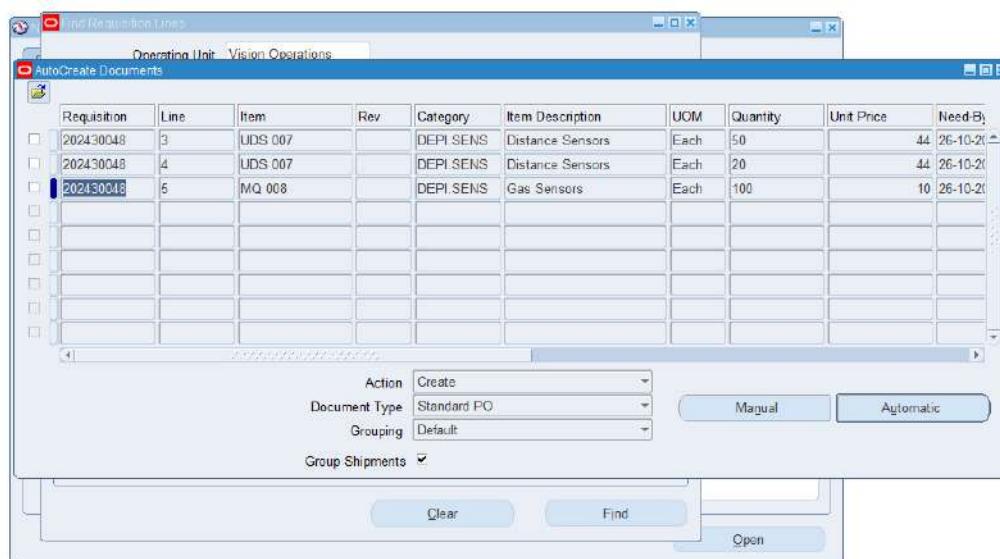
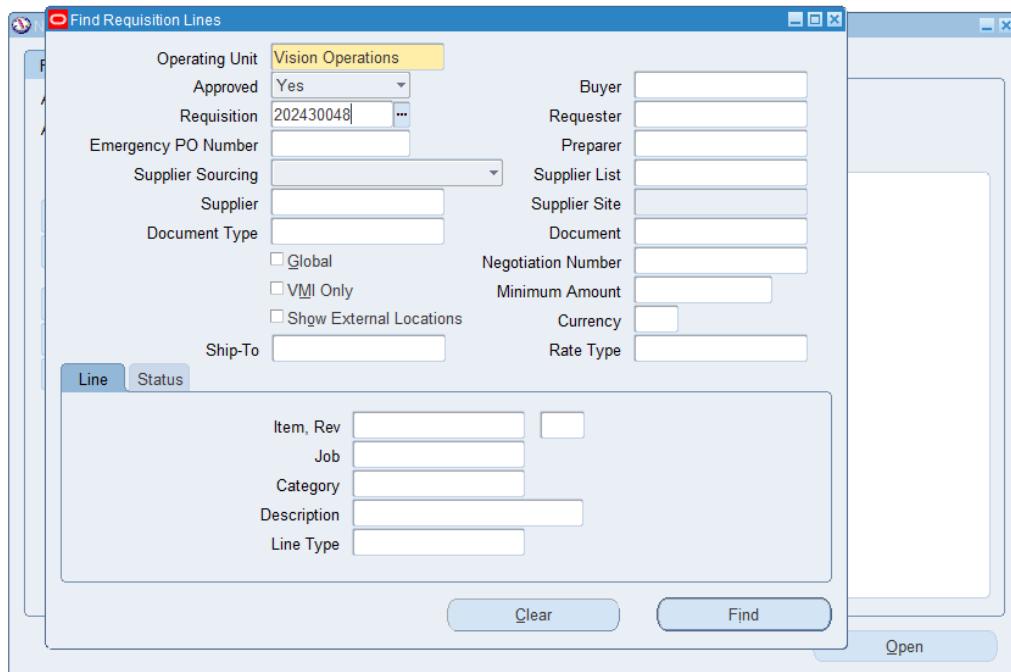
Lines New Open

Clear New Find (B)

Job Category Association Open

## Step 2:

- Navigate to -> Purchase Orders -> AutoCreate
- Enter the requisition number
- Select the find button to initiate the search and open the AutoCreate documents window.



## Step 3:

- From Edit menu -> Select All -> to select all lines.
- Select the document type we want to create (Standard PO, Planned PO, Blanket Release, or RFQ)
- Select Standard PO.
- Press Automatic to create a standard purchase order.



## Step 4:

- Save and record the PO number.
  - Approve and submit the PO.

**Approval Details**    **Additional Options**

**Encumbrance**

Reserve     Unreserve  
 Use GL Override     Use Document GL Date to Unreserve

Unreserve Date:     Accounting Date:

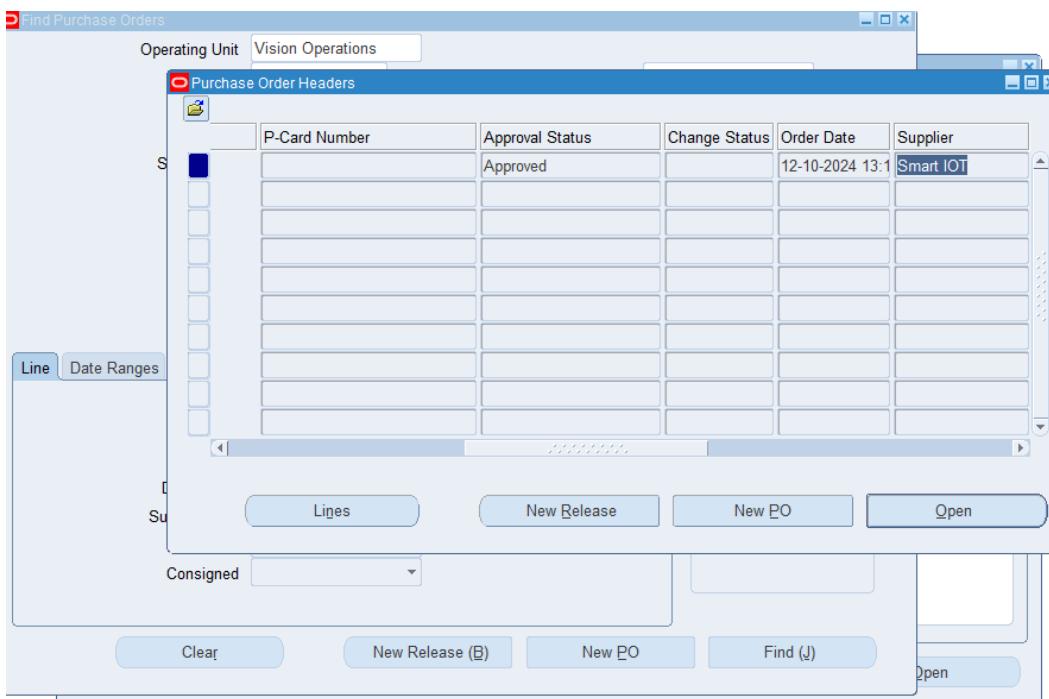
**Approval**

Submit for Approval    Forward From: Yusuf, Ms. Yousra  
 Forward    Approval Path: DEPI Group Hierarchy1  
 Note:   
 Change Summary:

**Transmission Methods**

Print     XML  
 Fax     EDI  
 E-Mail    FAX Number:     E-Mail Address:

**Buttons:** OK, Cancel (B), Approve...



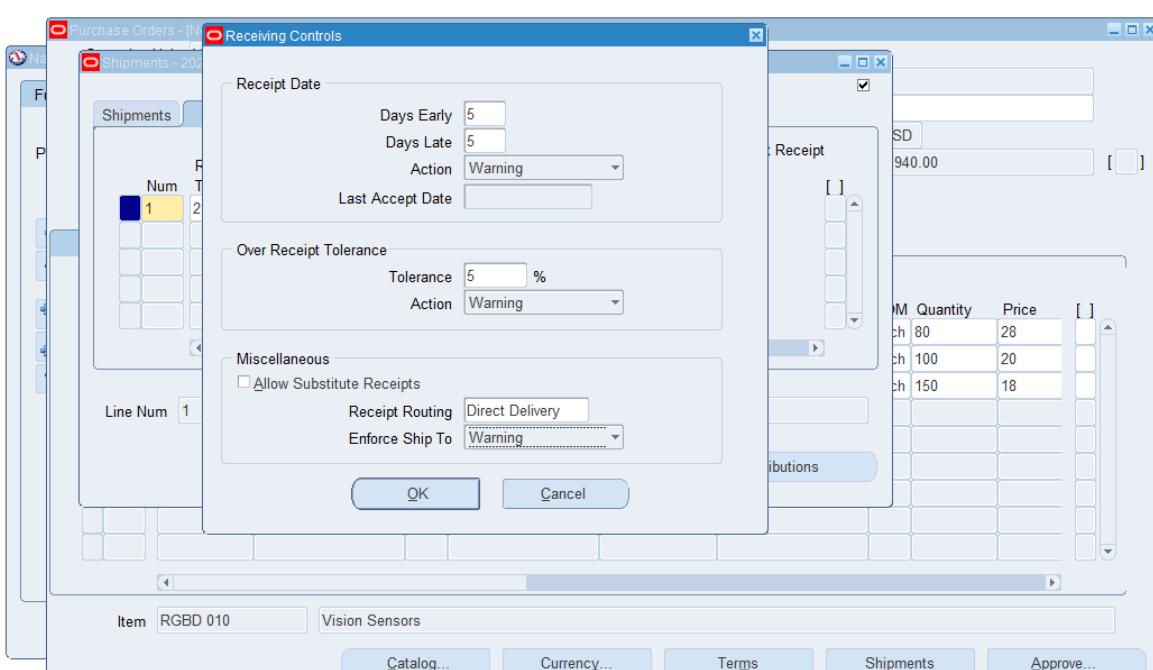
## 8. Receipts:

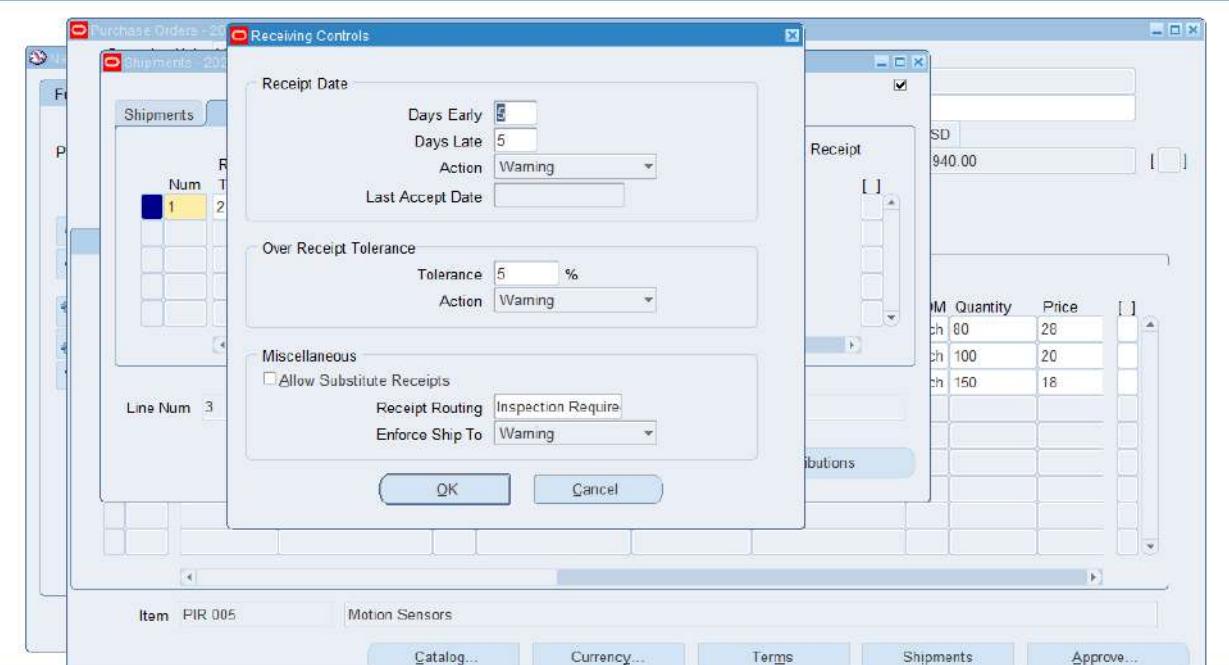
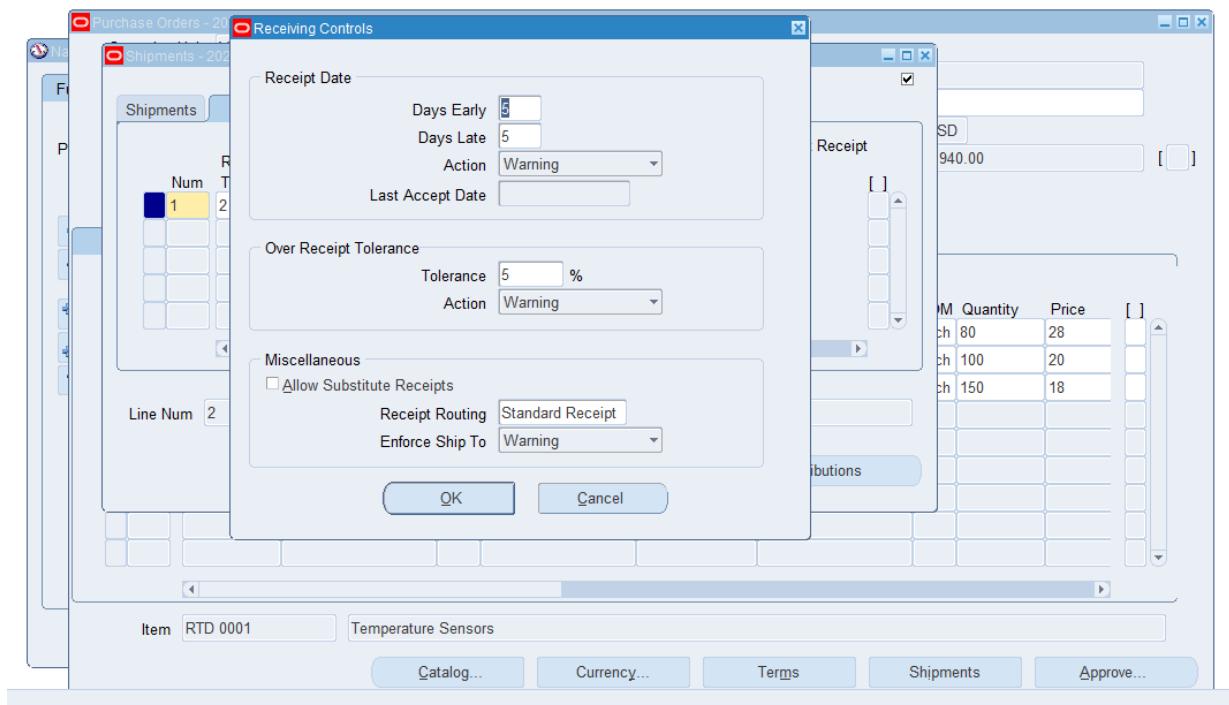
Creating receipts is the process of recording goods that have arrived at the distribution center into the warehouse system. Creating receipts is also known as receiving shipment lines.

Oracle Receiving supports the receipt of purchase orders, return material authorizations (RMAs), and interorganizational shipments using each of the three receipt routing methods.

These receipt routing methods include:

- Direct delivery
- Standard receipt
- Inspection required





- Direct Delivery

Shipments are received into a receiving location and put away in the same transaction.  
Put away happens automatically upon receipt creation.

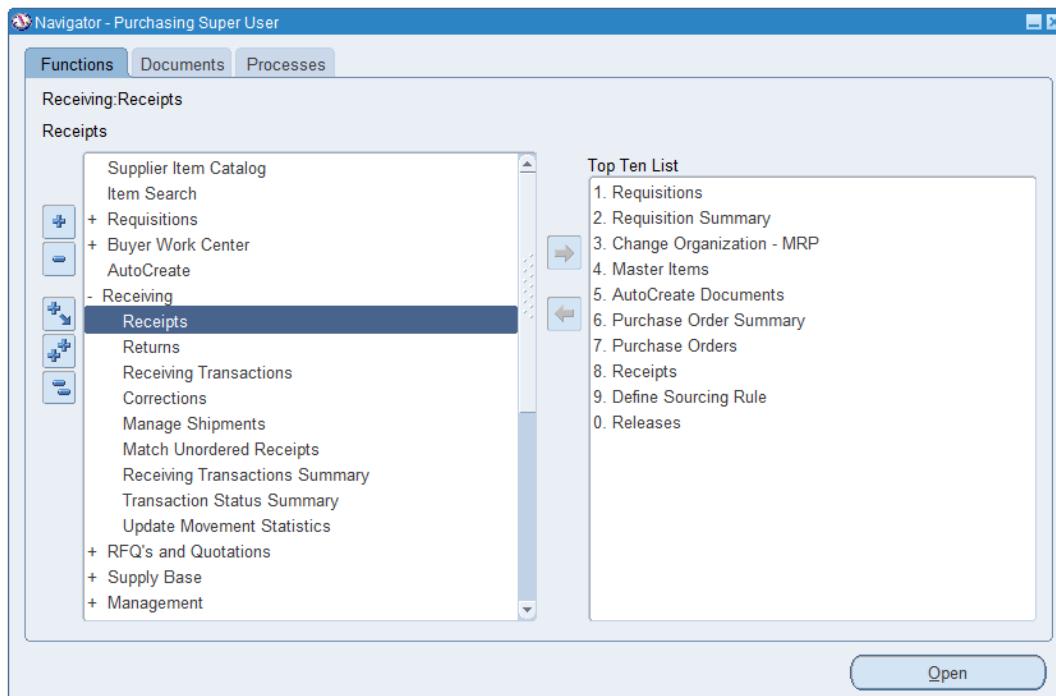
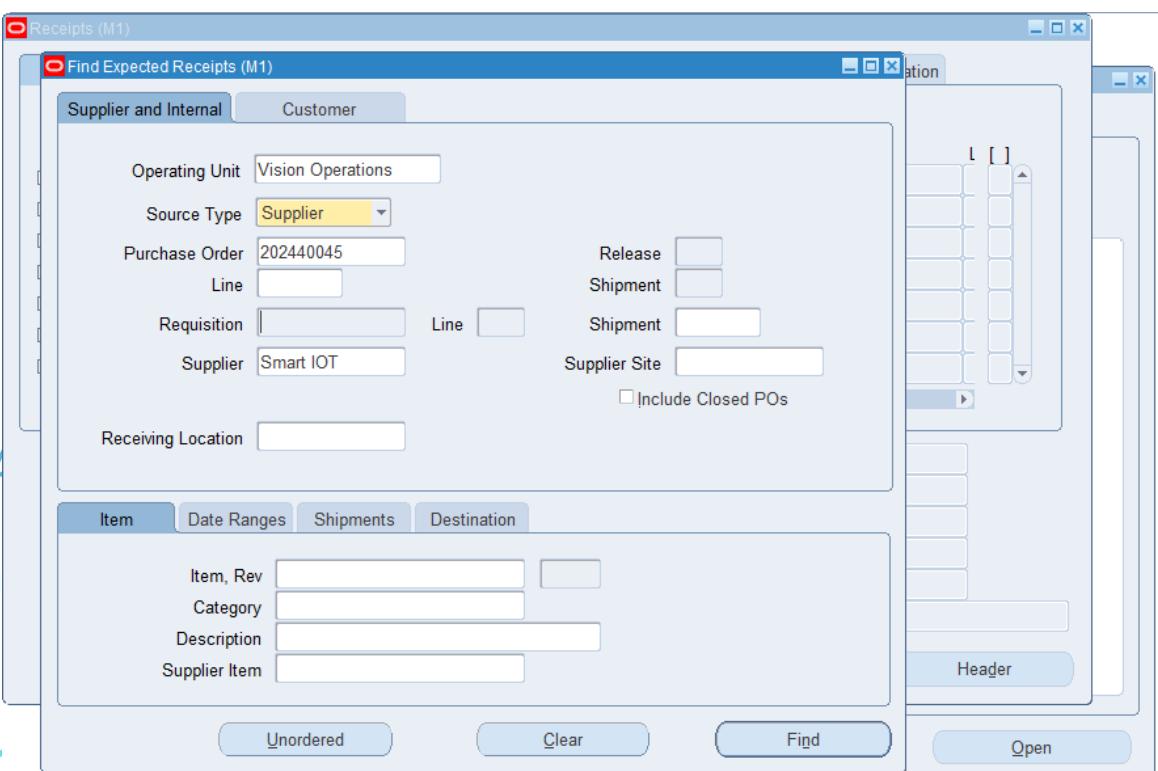
- Standard Receipt

Shipments are received into a receiving location and then put away in a separate transaction. Standard receipts can be inspected or transferred before put away.

- Inspection Required

Shipments are received into a receiving location and then inspected and put away in separate transactions. You can accept or reject material during the inspection, and put away to separate locations, based on the inspection result.

- Navigate to -> Receiving -> Receipts
- Select sources type (Supplier)
- Enter PO number, then press find

The screenshot shows the 'Find Expected Receipts (M1)' dialog box. The 'Supplier and Internal' tab is selected. The form includes the following fields:

- Operating Unit: Vision Operations
- Source Type: Supplier (selected)
- Purchase Order: 202440045
- Line: [ ]
- Requisition: [ ]
- Supplier: Smart IOT
- Release: [ ]
- Shipment: [ ]
- Shipment: [ ]
- Supplier Site: [ ]
- Include Closed POs
- Receiving Location: [ ]

Below the search criteria is a tabbed section with 'Item' selected, containing fields for Item, Rev, Category, Description, and Supplier Item. At the bottom are 'Unordered', 'Clear', 'Find' (highlighted in blue), and 'Open' buttons.

**Receipts (M1)**

**Receipt Header (M1)**

<input checked="" type="radio"/> New Receipt	<input type="radio"/> Add To Receipt
Receipt Date: 12-10-2024 17:47:3	
Shipment:	
Packing Slip:	
Freight Carrier:	
Containers:	
Supplier: Smart IOT	Received By: Yusuf, Ms. Yousra
Comments:	

Operating Unit: Vision Operations	Order Type: Standard
Supplier: Smart IOT	Order: 202440045
Item Description: Vision Sensors	Due Date: 28-10-2024 00:00:0
Destination: ---	Hazard:
Header Receiver Note:	UN Number:
Shipment Receiver Note:	Routing: Direct Delivery

To deliver goods to inventory

#### A. Direct Delivery:

- Choose sub-inventory & Save

**Receipts (M1)**

**Lines**

Quantity	UOM	Secondary Quantity	Secondary UOM
80	Each		
100	Each		
150	Each		

**Details**

Description: Vision Sensors	Location: M1- Seattle Mfg	Requester: IOT	Subinventory:
Temperature Sensors	M1- Seattle Mfg		
Motion Sensors	M1- Seattle Mfg		

**Currency**

**Order Information**

Operating Unit: Vision Operations	Order Type: Standard
Supplier: Smart IOT	Order: 202440045
Item Description: Vision Sensors	Due Date: 28-10-2024 00:00:0
Destination: M1- Seattle Mfg---	Hazard:
Header Receiver Note:	UN Number:
Shipment Receiver Note:	Routing: Direct Delivery

#### B. Standard Receipts

- The **Standard Receipt** option is a two-step process.
- The first step of the transaction is where we receive the item in a staging area.
- The second step is to perform the put-away transaction. This is where you put the item into inventory, or if it is an expense item, it will be expensed.

### C. Standard Receipts

- With the **Inspection Required** option, we have to create the receipt first and then do the inspection for the item.
  - We cannot perform the put-away transaction before the item is inspected.
  - After performing the inspection, we can either accept or reject the item.
  - Once the inspection has been done and the item accepted, we can go ahead and perform the put-away transaction.

Navigator - Purchasing Super User

Functions Documents Processes

Receiving:Receiving Transactions

Receiving Transactions

- Supplier Item Catalog
- Item Search
- + Requisitions
- + Buyer Work Center
- AutoCreate
- Receiving
  - Receipts
  - Returns
- Receiving Transactions**
- Corrections
- Manage Shipments
- Match Unordered Receipts
- Receiving Transactions Summary
- Transaction Status Summary
- Update Movement Statistics
- + RFQ's and Quotations
- + Supply Base
- + Management

**Top Ten List**

1. Requisitions
2. Requisition Summary
3. Change Organization - MRP
4. Master Items
5. AutoCreate Documents
6. Purchase Order Summary
7. Purchase Orders
8. Receipts
9. Define Sourcing Rule
0. Releases

**Open**



**Receiving Transactions (M1)**

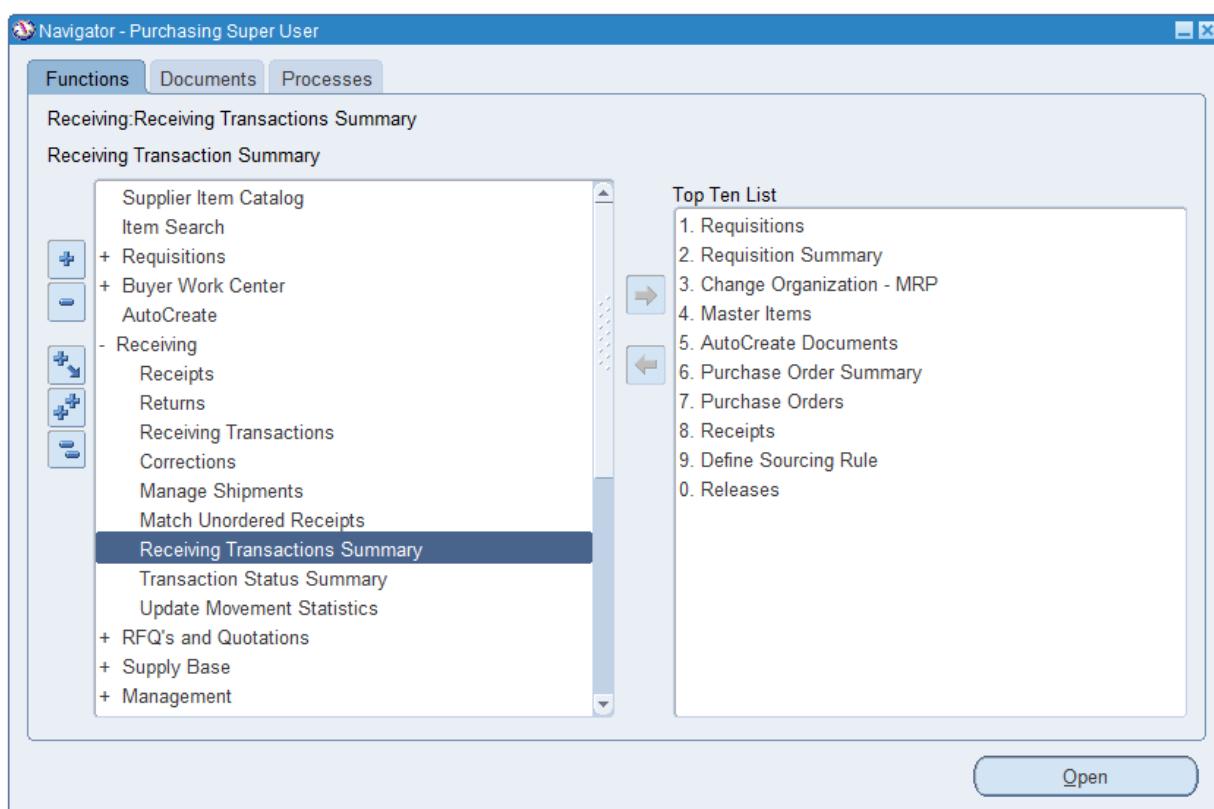
Lines		Details		Order Information		Outside Services		Currency	
Secondary									
Quantity		UOM		Quantity		UOM		Subinventory	
<input checked="" type="checkbox"/>	90	Each						IOT	[ ]
<input checked="" type="checkbox"/>	120	Each							
<input type="checkbox"/>									
<input type="checkbox"/>									
<input type="checkbox"/>									
<input type="checkbox"/>									
<input type="checkbox"/>									
<input type="checkbox"/>									
<input type="button" value="Add"/> <input type="button" value="Delete"/>									
<input type="button" value="Previous"/> <input type="button" value="Next"/>									
Operating Unit: Vision Operations Supplier: Smart IOT Description: Motion Sensors Destination: ---					Receipt: 23749 Order: 202440045 Parent Type: Receive Inspection: Not Inspected - Inspect Current Location: M1 - Seattle Mfg Hazard Class:				
Header Receiver Note: Shipment Receiver Note:									
<input type="button" value="Lot-Serial"/> <input type="button" value="Cascade"/> <input type="button" value="Express"/> <input type="button" value="Inspect"/>									



**Receiving Transactions (M1)**

Lines		Details		Order Information		Outside Services		Currency																																																																													
Secondary <table border="1"> <thead> <tr> <th>Quantity</th> <th>UOM</th> <th>Quantity</th> <th>UOM</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 20</td> <td>Each</td> <td></td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/> 100</td> <td>Each</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Quantity	UOM	Quantity	UOM	<input type="checkbox"/> 20	Each			<input checked="" type="checkbox"/> 100	Each																											<table border="1"> <thead> <tr> <th>Destination Type</th> <th>Item</th> <th>Rev</th> <th>Item Description</th> </tr> </thead> <tbody> <tr> <td>Inventory</td> <td>PIR 005</td> <td></td> <td>Motion Sensors</td> </tr> <tr> <td>Inspect</td> <td>PIR 005</td> <td></td> <td>Motion Sensors</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>						Destination Type	Item	Rev	Item Description	Inventory	PIR 005		Motion Sensors	Inspect	PIR 005		Motion Sensors																												
Quantity	UOM	Quantity	UOM																																																																																		
<input type="checkbox"/> 20	Each																																																																																				
<input checked="" type="checkbox"/> 100	Each																																																																																				
Destination Type	Item	Rev	Item Description																																																																																		
Inventory	PIR 005		Motion Sensors																																																																																		
Inspect	PIR 005		Motion Sensors																																																																																		
<input style="width: 20px; height: 20px; margin-right: 10px;" type="button" value="+"/> <input style="width: 20px; height: 20px;" type="button" value="-"/>				<input style="width: 40px; height: 20px; margin-right: 10px;" type="button" value="Previous"/> <input style="width: 40px; height: 20px;" type="button" value="Next"/>																																																																																	
Operating Unit		Vision Operations		Receipt		23749																																																																															
Supplier		Smart IOT		Order		202440045																																																																															
Description		Motion Sensors		Parent Type		Accept																																																																															
Destination		---		Inspection		Accepted - Inspection R																																																																															
Header Receiver Note				Current Location		M1- Seattle Mfg																																																																															
Shipment Receiver Note				Hazard Class																																																																																	

- Review receiving transactions
  - Navigate to -> Receiving Transactions Summary



**Find Receiving Transactions (M1)**

**Supplier and Internal** **Customer**

Operating Unit: Vision Operations ...

Source Type: All

Purchase Order:

Line:

Requisition:  Line:

Supplier:

Receipt: 23749

Release:

Shipment:

Shipment:

Supplier Site:

Receiving Location:

**Item** **Receipt Details** **Transaction Details** **Shipments** **Destination**

Item, Rev:

Category:

Description:

Supplier Item:

**Results**

Headers  
 Transactions

**Clear** **Find** **Open**

**Find Receiving Transactions (M1)**

**Receipt Headers Summary (M1)**

**Receipt Transaction Summary (M1)**

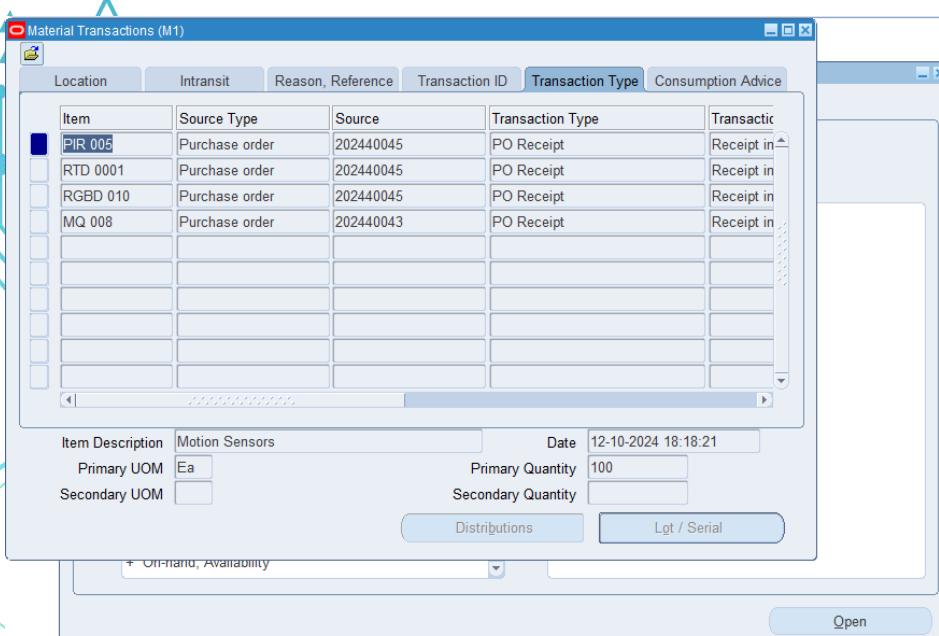
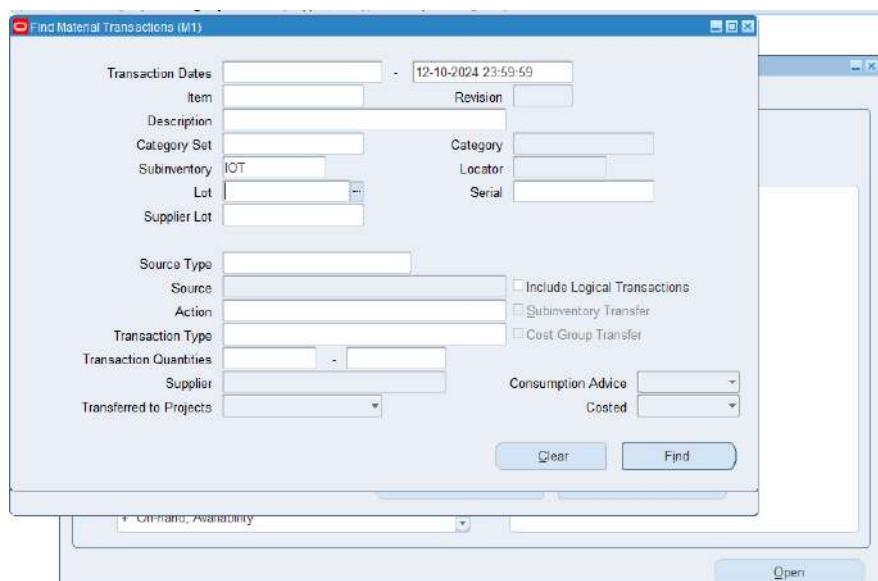
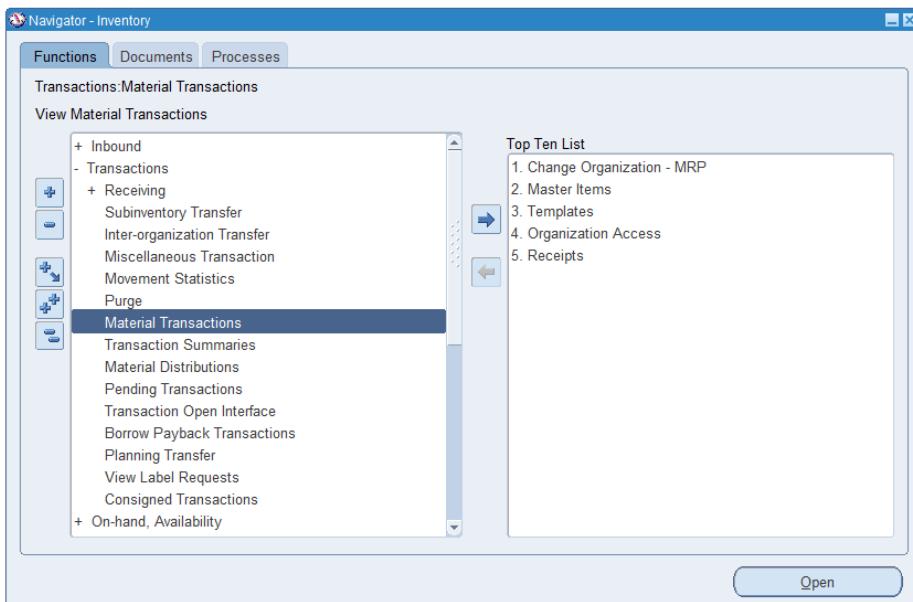
Transaction Type	Amount	Unit	Date	Item	Rev	Destination	Receipt
- Receive	80	Each	12-10-2024	RGBD 010		Receiving	23749
Deliver	80	Each	12-10-2024	RGBD 010		Inventory	23749
- Receive	90	Each	12-10-2024	RTD 0001		Receiving	23749
Deliver	90	Each	12-10-2024	RTD 0001		Inventory	23749
- Receive	120	Each	12-10-2024	PIR 005		Receiving	23749
Accept	100	Each	12-10-2024	PIR 005		Receiving	23749
Accept	100	Each	12-10-2024	PIR 005		Receiving	23749

Order Type: Purchase Order  
 Source: Smart IOT  
 Description: Vision Sensors  
 Destination: -M1- Seattle Mfg-  
 Header Receiver Note:   
 Shipment Receiver Note:

Operating Unit: Vision Operations  
 Order: 202440045  
 Transaction Date: 12-10-2024 17:47:3  
 Hazard:   
 UN Number:   
 Routing: Direct Delivery

**Header** **Open**

- Review material transactions
  - Navigate to -> Material Transactions



## 9. Returns:

- When we are entering a return, the first step is to identify the purchase order number and/or item that we want to return.
- We can choose among various selection criteria when searching for items in the Find Returns window.

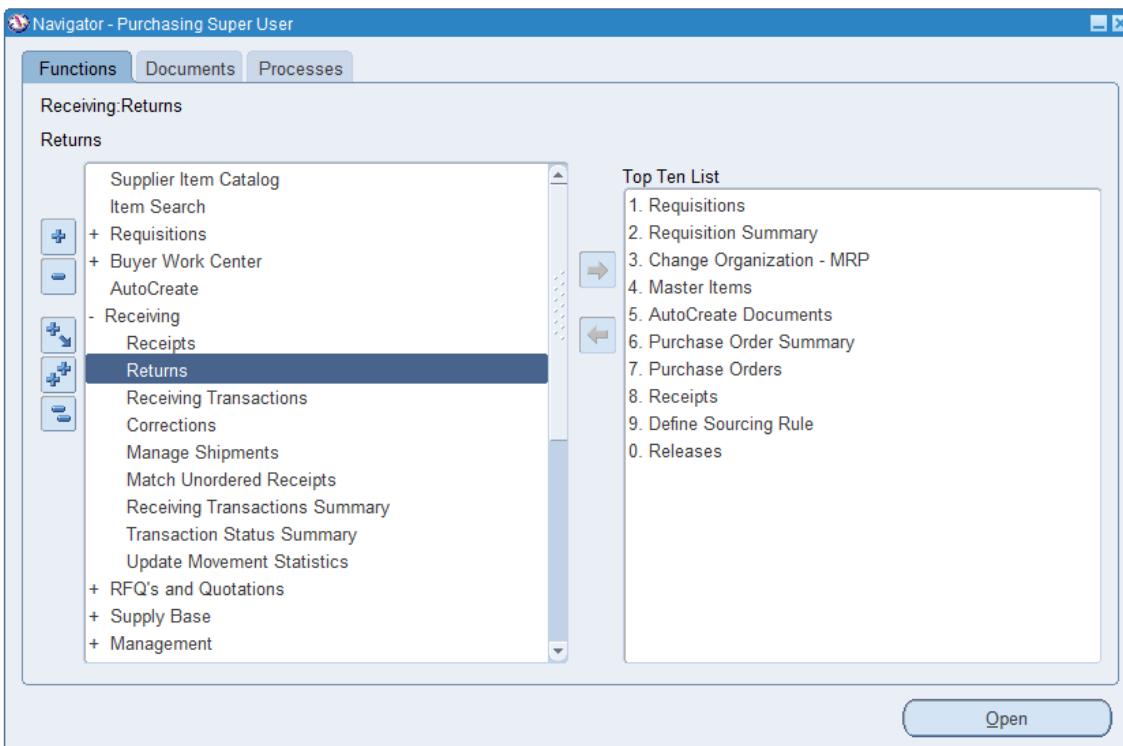
### A. To return items to receiving

- Enter the return quantity. If we originally performed a direct receipt, we must specify a Return To receiving location.
- We can update the return from sub-inventory. We can also optionally specify additional return information such as Reason Code and RMA number.

### B. To return items to the supplier

- Enter the return quantity. Purchasing provides the source supplier for the items.
- We can update the Return From sub-inventory. We can also optionally specify additional return information such as Reason Code and RMA number.
- When we return items to the supplier, purchasing creates both a Return to Receiving and a Return to Supplier transaction. Purchasing also reopens the associated purchase order for the return quantity by reducing the original receipt quantity.

- Navigate to -> Receiving -> Returns





Sense the Future

**Receiving Returns (M1)**

**Find Returns (M1)**

**Supplier and Internal**   **Customer**

Operating Unit	Vision Operations	Receipt	[ ]
Source Type	Supplier	Release	[ ]
Purchase Order	202440048	Shipment	[ ]
Line		Shipment	[ ]
Requisition		Supplier Site	[ ]
Supplier		Current Location	[ ]

**Item**   **Date Ranges**   **Transaction Details**   **Shipments**   **Destination**

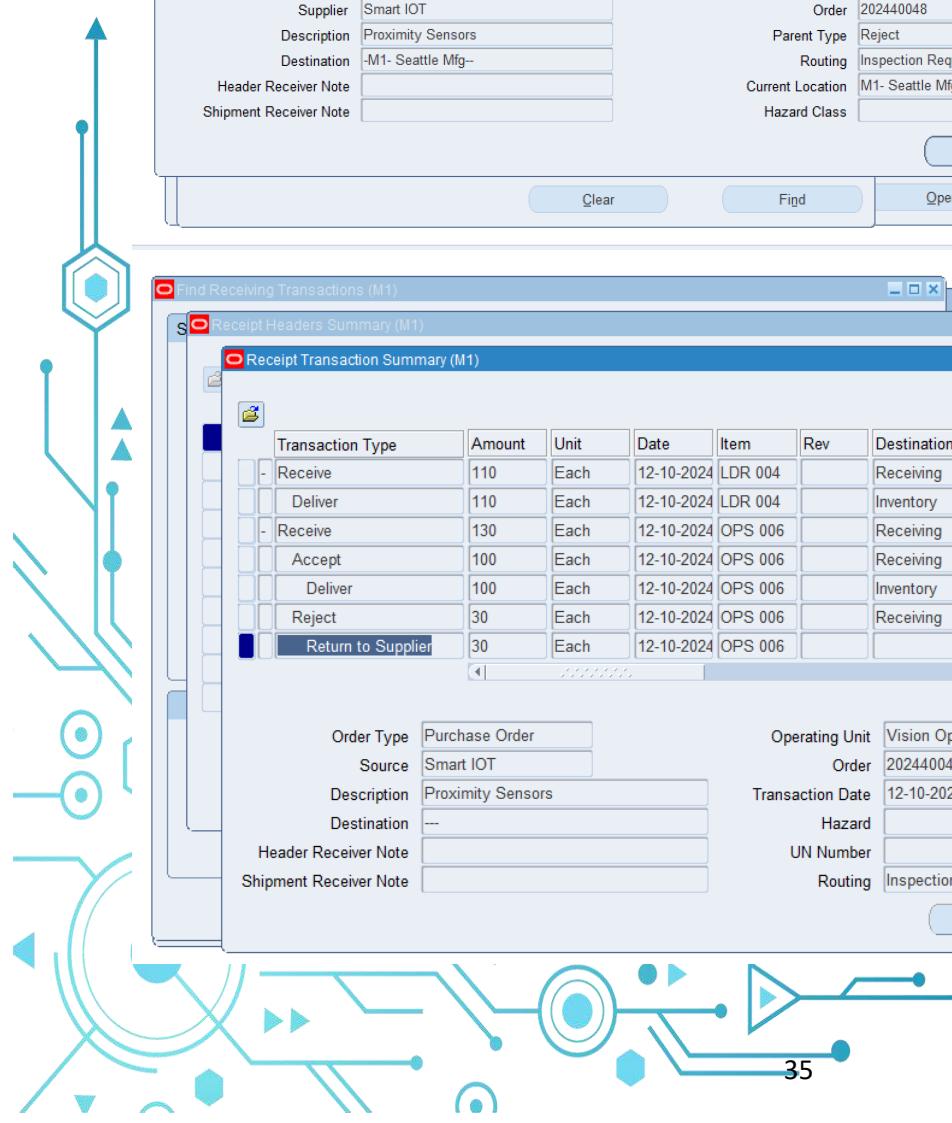
Item, Rev		
Category		
Description		
Supplier Item		

**Lot - Serial**

**Clear**   **Find**   **Open**

Receiving Returns (M1)

Transactions		Details		Return From		Order Information		Outside Services	
Secondary Quantity		UOM		Return To		Supplier/Customer/ Location		RMA Number	Item
<input type="checkbox"/>		<input type="checkbox"/>	Each						OPS 006
<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>	Each	Supplier	Smart IOT				OPS 006
<input type="checkbox"/>		<input type="checkbox"/>	Each						LDR 004
<input type="checkbox"/>		<input type="checkbox"/>	Each						CAPS 002
<input type="checkbox"/>		<input type="checkbox"/>							
<input type="checkbox"/>		<input type="checkbox"/>							
<input type="checkbox"/>		<input type="checkbox"/>							
<input type="checkbox"/>		<input type="checkbox"/>							
Operating Unit		Vision Operations			Receipt		23750		
Supplier		Smart IOT			Order		202440048		
Description		Proximity Sensors			Parent Type		Reject		
Destination		M1- Seattle Mfg-			Routing		Inspection Required		
Header Receiver Note					Current Location				
Shipment Receiver Note					M1- Seattle Mfg				
					Hazard Class				
Lot - Serial									
<input type="button" value="Clear"/>					<input type="button" value="Find"/>			<input type="button" value="Open"/>	



Receipt Transaction Summary (M1)							
Transaction Type	Amount	Unit	Date	Item	Rev	Destination	Receipt
Receive	110	Each	12-10-2024	LDR 004		Receiving	23750
Deliver	110	Each	12-10-2024	LDR 004		Inventory	23750
Receive	130	Each	12-10-2024	OPS 006		Receiving	23750
Accept	100	Each	12-10-2024	OPS 006		Receiving	23750
Deliver	100	Each	12-10-2024	OPS 006		Inventory	23750
Reject	30	Each	12-10-2024	OPS 006		Receiving	23750
Return to Supplier	30	Each	12-10-2024	OPS 006			23750

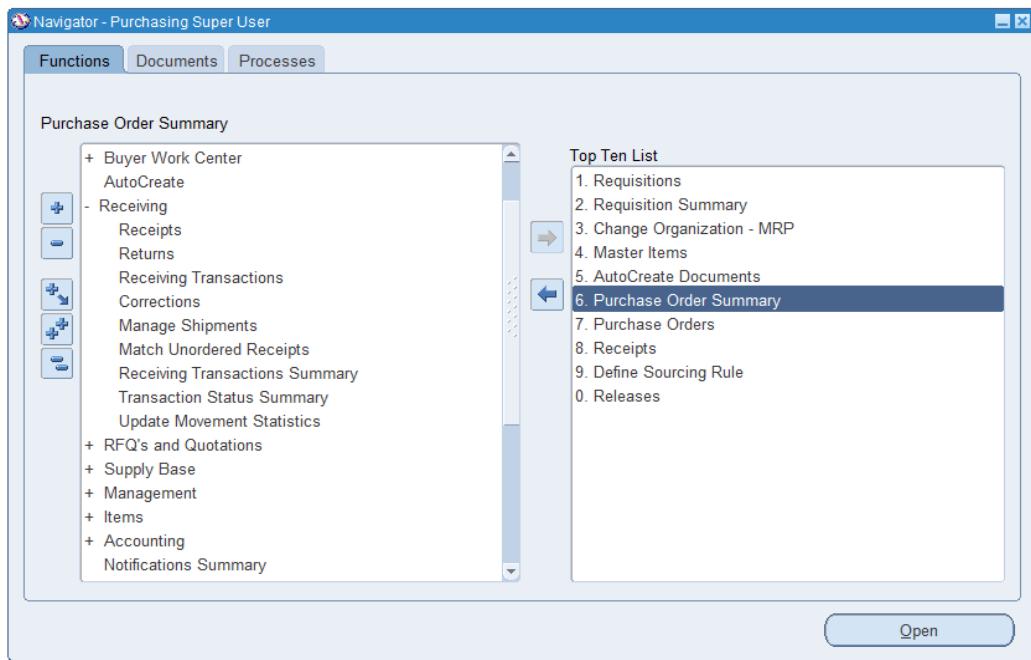
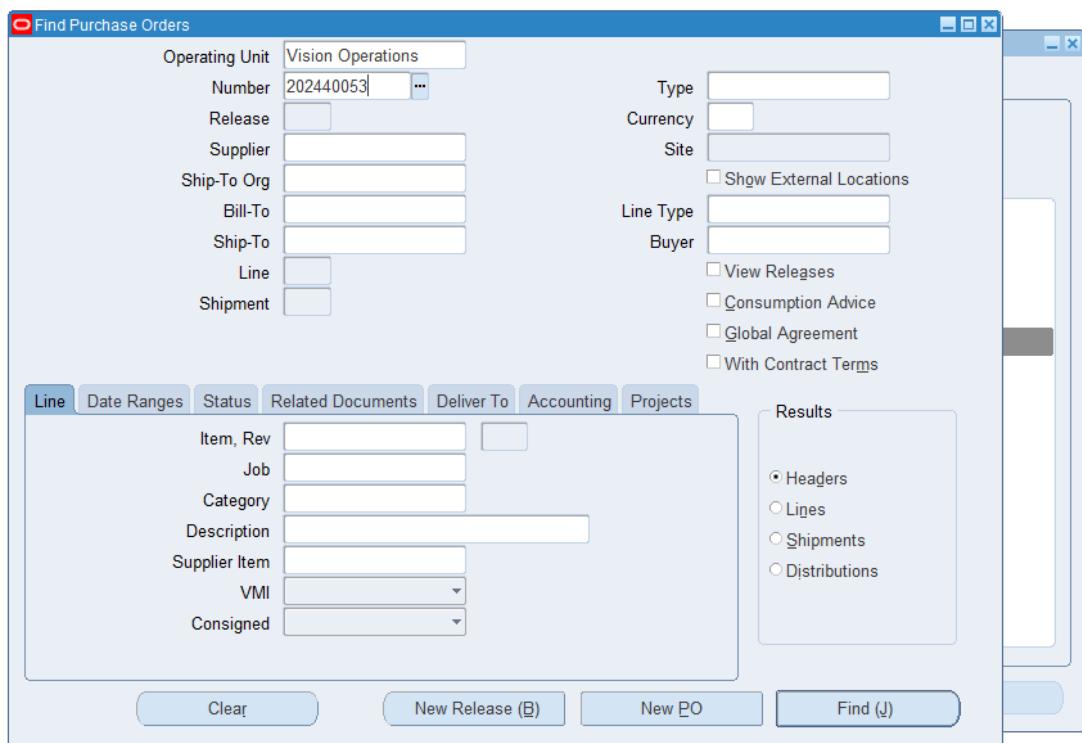
  

Order Type	Purchase Order	Operating Unit	Vision Operations
Source	Smart IOT	Order	202440048
Description	Proximity Sensors	Transaction Date	12-10-2024 20:00:2
Destination	---	Hazard	
Header Receiver Note		UN Number	
Shipment Receiver Note		Routing	Inspection Required

## 10. Copy Purchase Order (PO)

To copy a purchase order

- Navigate to -> Purchase Order Summary.
- Find the Purchase Order to Copy.
- We can search by order number, supplier, or other relevant fields.
- After copying, a new purchase order form will open with the details pre-filled from the original order
- We can make any necessary changes, such as updating quantities, prices, or delivery dates.
- Once we have made the changes, save the new purchase order.

The screenshot shows the 'Find Purchase Orders' dialog box. It includes fields for Operating Unit (set to Vision Operations), Number (202440053), Release, Supplier, Ship-To Org, Bill-To, Ship-To, Line, and Shipment. On the right, there are filters for Type, Currency, Site, Line Type, Buyer, and checkboxes for View Releases, Consumption Advice, Global Agreement, and With Contract Terms. The 'Line' tab is selected. The 'Results' section contains radio buttons for Headers, Lines, Shipments, and Distributions.

Line		Date Ranges	Status	Related Documents	Deliver To	Accounting	Projects
Item, Rev							
Job							
Category							
Description							
Supplier Item							
VMI							
Consigned							

**Results**

- Headers
- Lines
- Shipments
- Distributions

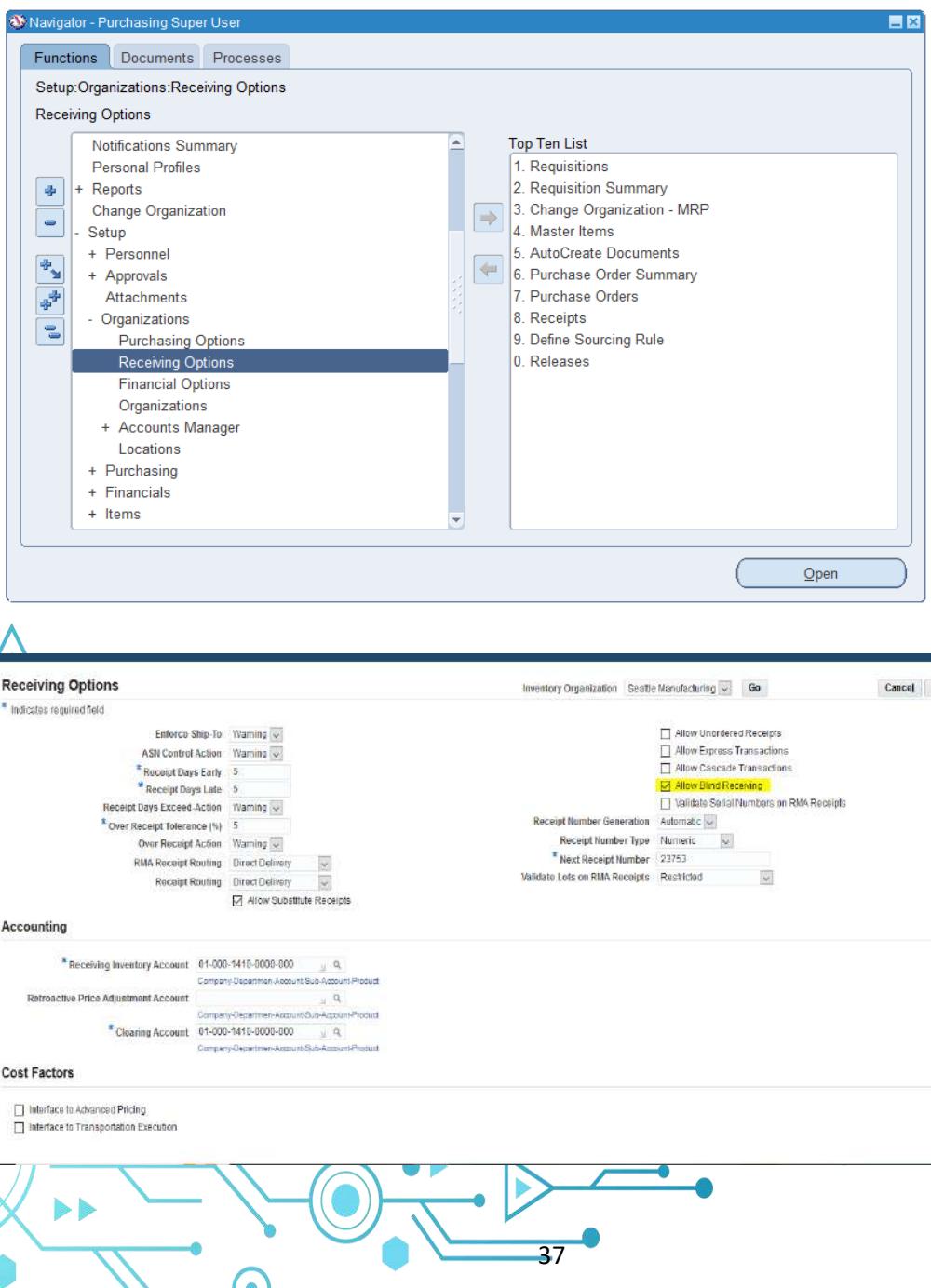
Buttons at the bottom: Clear, New Release (B), New PO, Find (J)

## 11. Blind receipt

Blind Receiving is a feature where the receiver can enter the quantity received without having visibility of the ordered quantity. This is typically used in environments where receiving personnel are not given the details of the order, so they are unaware of the expected quantity.

### Step 1:

- Navigate to Setup -> Organizations > Receiving Options.
- Select the Organization for which we want to enable blind receiving.
- In the Receiving Options window, find the checkbox labeled Allow Blind Receiving.
- Check this box to enable blind receiving, which allows receipts to be recorded without reference to the purchase order details.
- Save the changes.



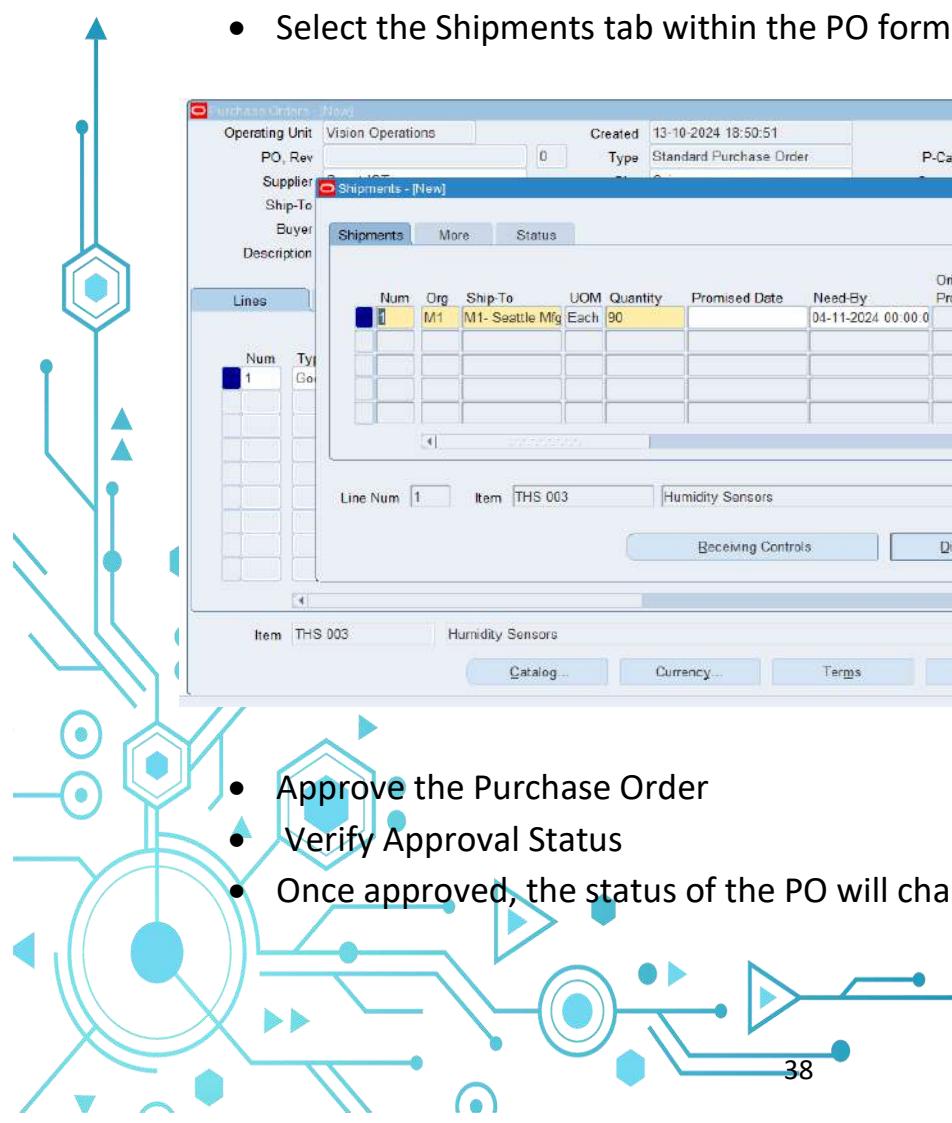
## Step 2:

## Create PO

- Navigate to -> Purchase Orders -> Purchase Orders.
  - Enter the Header Information
  - Add Item and Quantity



- Enter Shipment Information
  - Select the Shipments tab within the PO form.



- Approve the Purchase Order
  - Verify Approval Status
  - Once approved, the status of the PO will change to Approved.



**Approve Document - 20240053**

**Approval Details**    Additional Options

**Encumbrance**

Reserve     Unreserve    Unreserve Date   
 Use GL Override     Use Document GL Date to Unreserve    Accounting Date

**Approval**

Submit for Approval    Forward From Yusuf, Ms. Yousra  
 Forward    Approval Path DEPI Group Hierarchy1  
 Note     Forward To OMAIMA MOHAMED 2,  
 Change Summary

**Transmission Methods**

Print     XML  
 Fax    FAX Number      EDI  
 E-Mail    E-Mail Address

**Buttons:** OK, Cancel (B)

**Navigation:** Catalog..., Currency..., Terms, Shipments, Approve...

## Step 3: Receipt

- 1. Navigate to -> Receiving -> Receipts.
  - 2. Find the Purchase Order.
  - 3. Select the Line Items.
  - 4. Enter quantity.
  - 5. Select Sub-inventory.
  - 6. Save the Receipt.



Sense the Future

The screenshot shows the SAP Navigator interface for a Purchasing Super User. The top navigation bar includes tabs for Functions, Documents, and Processes. Below the navigation bar, the title 'Receiving:Receipts' is displayed, followed by a section titled 'Receipts'. A tree view on the left lists various purchasing functions, with 'Receipts' currently selected. To the right of the tree view is a 'Top Ten List' of related functions, and at the bottom right is an 'Open' button.

Supplier Item Catalog

Item Search

+ Requisitions

+ Buyer Work Center

AutoCreate

- Receiving

Receipts

Returns

Receiving Transactions

Corrections

Manage Shipments

Match Unordered Receipts

Receiving Transactions Summary

Transaction Status Summary

Update Movement Statistics

+ RFQ's and Quotations

+ Supply Base

+ Management

**Top Ten List**

1. Requisitions
2. Requisition Summary
3. Change Organization - MRP
4. Master Items
5. AutoCreate Documents
6. Purchase Order Summary
7. Purchase Orders
8. Receipts
9. Define Sourcing Rule
0. Releases

Open

**Receiving Transactions (M1)**

**Find Receiving Transactions (M1)**

**Supplier and Internal**   **Customer**

Operating Unit: Vision Operations

Source Type: All

Purchase Order: 202440053

Line:

Requisition:  Line:

Supplier:

Receipt:

Release:

Shipment:

Shipment:

Supplier Site:

Current Location:

**Item**   **Receipt Details**   **Transaction Details**   **Shipments**   **Destination**

Item, Rev:

Category:

Description:

Supplier Item:

**Clear**   **Find**   **Open**

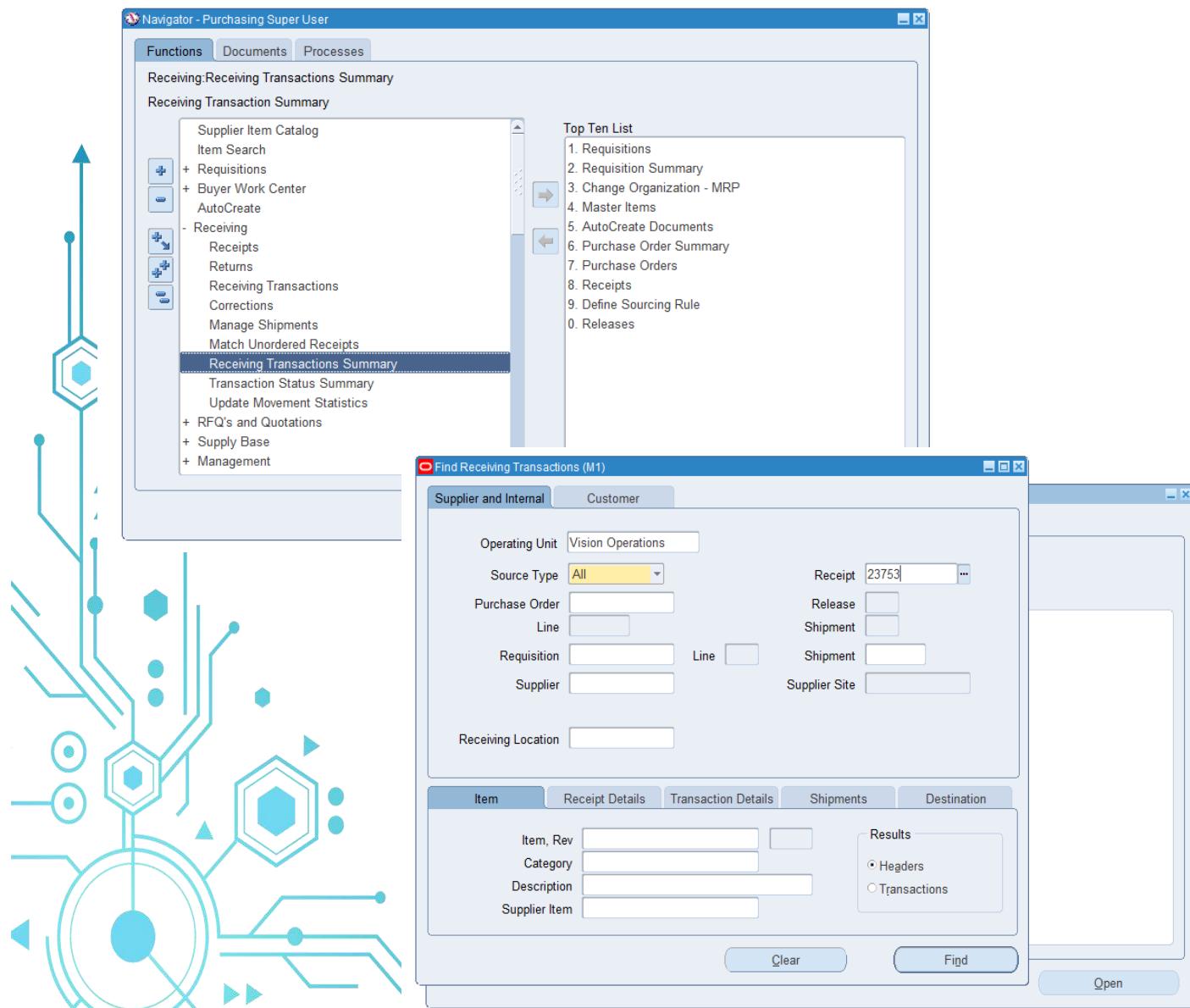


Sense the Future

## **Step 4:**

## Receiving Transaction Summary

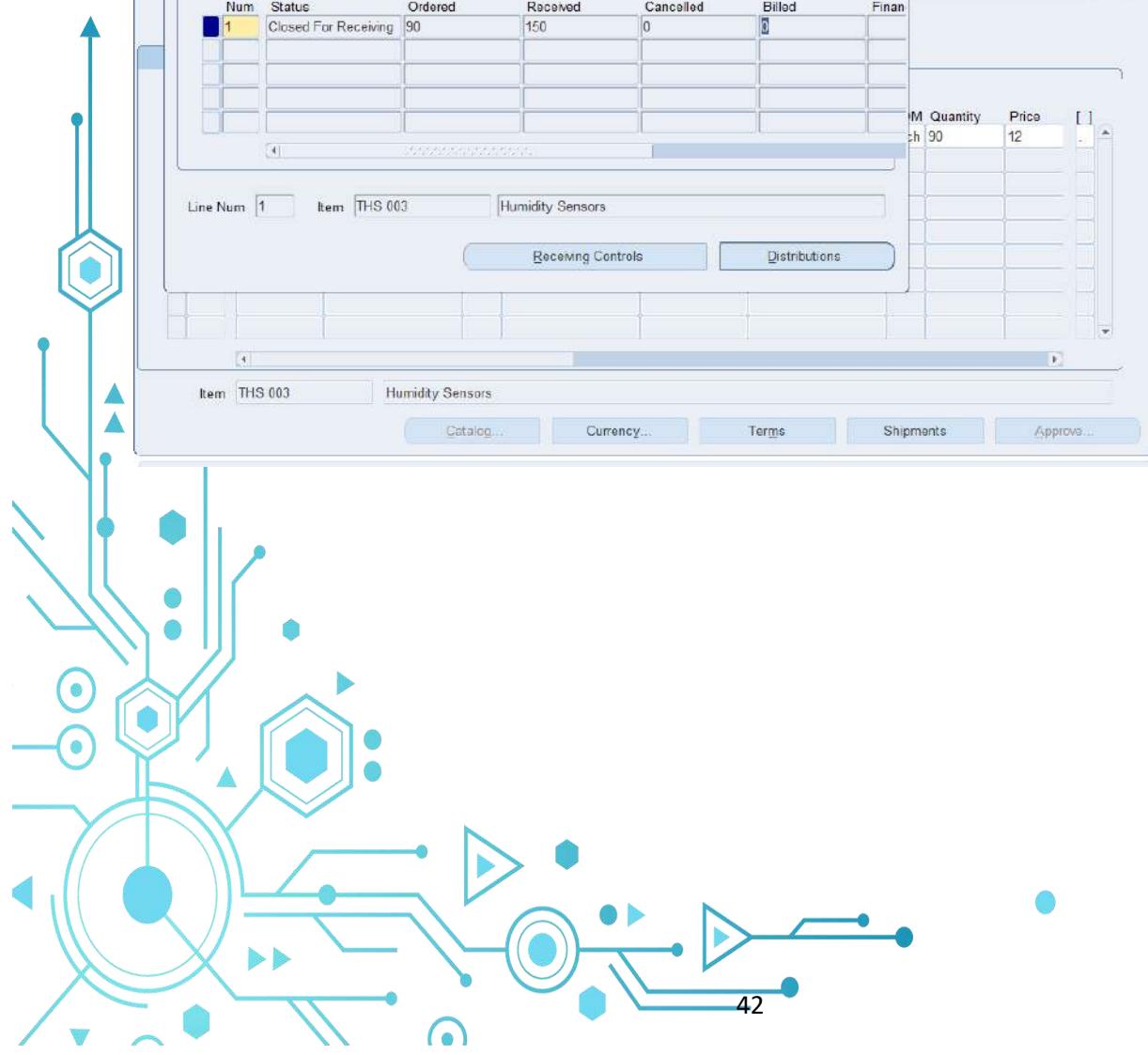
- Navigate to -> Receiving -> Receiving Transactions Summary.
  - Find the receipt using the receipt number.
  - View Transaction Details.





Sense the Future

- Status of a receipt is set to Closed for Receiving

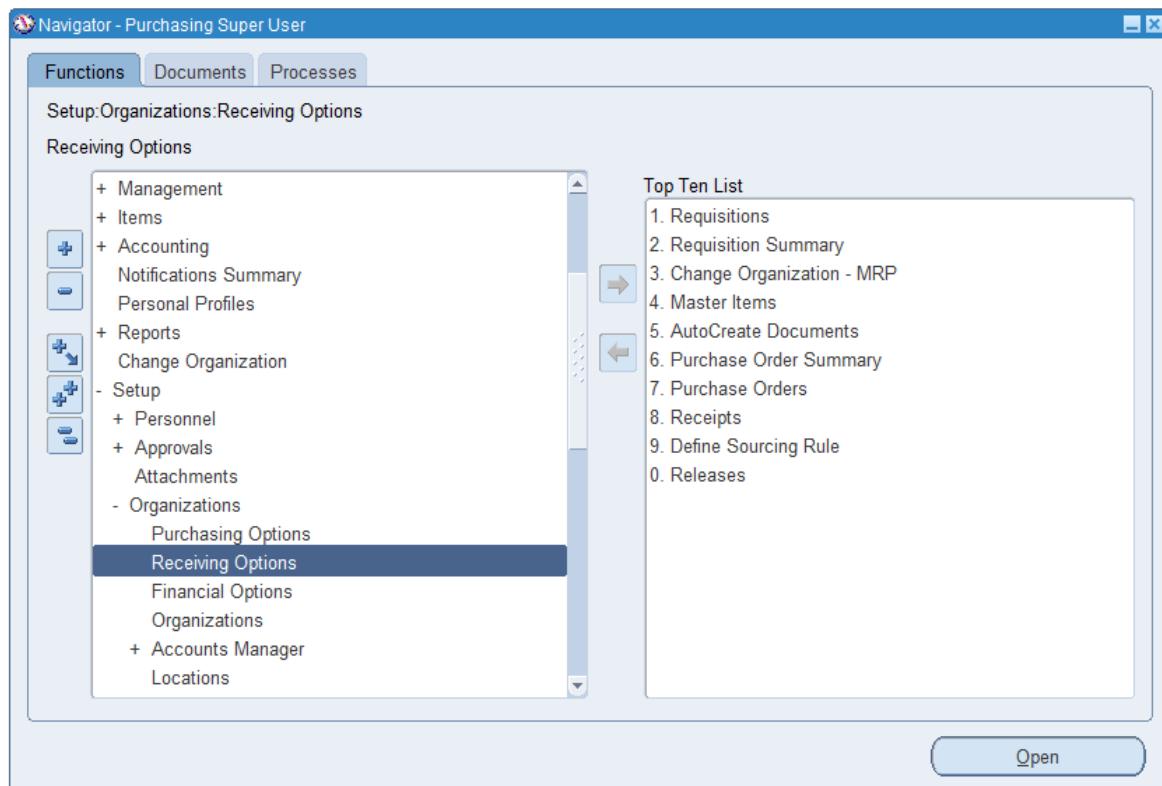


## 12. Express Receipt

The express receipt is a quick method of entering receipts and receiving transactions

### Step 1:

- Navigate to Setup -> Organizations > Receiving Options.
- In the Receiving Options form, locate and check the option for Allow Express Transactions.
- Save the changes.



The screenshot shows the 'Receiving Options' configuration page. At the top, there's a note: '\* Indicates required field'. The page is divided into several sections:
 

- Shipping**: Fields include Enforce Ship To (Warning dropdown), ASN Control Action (Warning dropdown), \*Receipt Days Early (5), \*Receipt Days Late (5), Receipt Days Exceed Action (Warning dropdown), Over Receipt Tolerance (%) (5), Over Receipt Action (Warning dropdown), RMA Receipt Routing (Direct Delivery dropdown), and Receipt Routing (Direct Delivery dropdown). A checkbox for Allow Substitute Receipts is checked.
- Accounting**: Fields include \*Receiving Inventory Account (01-000-1410-0000-000) and Company-Department-Account-Sub-Account-Product dropdown, Retroactive Price Adjustment Account (Company-Department-Account-Sub-Account-Product dropdown), and \*Clearing Account (01-000-1410-0000-000) and Company-Department-Account-Sub-Account-Product dropdown.
- Cost Factors**: Checkboxes for Interface to Advanced Pricing and Interface to Transportation Execution are present.
- Receiving Options**: A group of checkboxes includes Allow Unordered Receipts, **Allow Express Transactions** (which is checked), Allow Cascade Transactions, Allow Blind Receiving, and Validate Serial Numbers on RMA Receipts.
- Receipt Number Generation**: Fields include Receipt Number Type (Numeric dropdown), \*Next Receipt Number (23755), and Validate Lots on RMA Receipts (Restricted dropdown).

## Step 2:

## Create PO

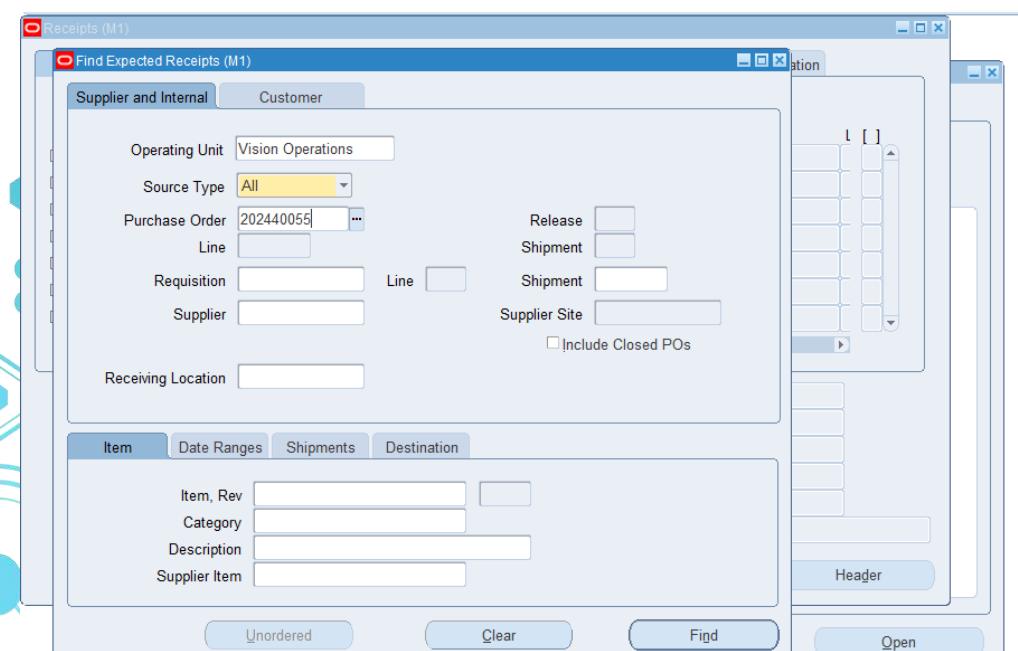
- Navigate to -> Purchase Orders -> Purchase Orders.
  - Enter the Header Information
  - Add Item and Quantity
  - Approve the PO.



### **Step 3:**

## Receipt

- Navigate to -> Receiving -> Receipts.
  - In the Find Expected Receipts window, enter the PO number (202440055) in the PO Number field.
  - Click Find to display the expected receipts associated with the given purchase order.
  - This will show us the items, quantities, and shipment details that are expected to be received for the PO 202440055.



**Receipts (M1)**

**Receipt Header (M1)**

<input checked="" type="radio"/> New Receipt	<input type="radio"/> Add To Receipt
Receipt Date: 13-10-2024 21:08:2	
Shipped Date:	
Waybill/Airbill:	
Bill of Lading:	
Received By: Yusuf, Ms. Yousra	
Containers:	
Supplier: Smart IOT	
Comments:	

Operating Unit: Vision Operations	Order Type: Standard
Supplier: Smart IOT	Order: 202440055
Item Description: Vision Sensors	Due Date: 28-10-2024 00:00:0
Destination: M1- Seattle Mfg---	Hazard:
Header Receiver Note:	UN Number:
Shipment Receiver Note:	Routing: Standard Receipt

Lot - Serial      Cascade      Express      Header

Unordered      Clear      Find      Open

**Receipts (M1)**

**Lines**

Quantity	UOM	Secondary Quantity	UOM
70	Each		

**Destination**

Type: Receiving	Item: RGBD 010	Rev:	Description: Vision Sensors

**Note**

Total express transactions created: 1

**Operating Unit**: Vision Operations

**Supplier**: Smart IOT

**Item Description**: Vision Sensors

**Destination**: M1- Seattle Mfg---

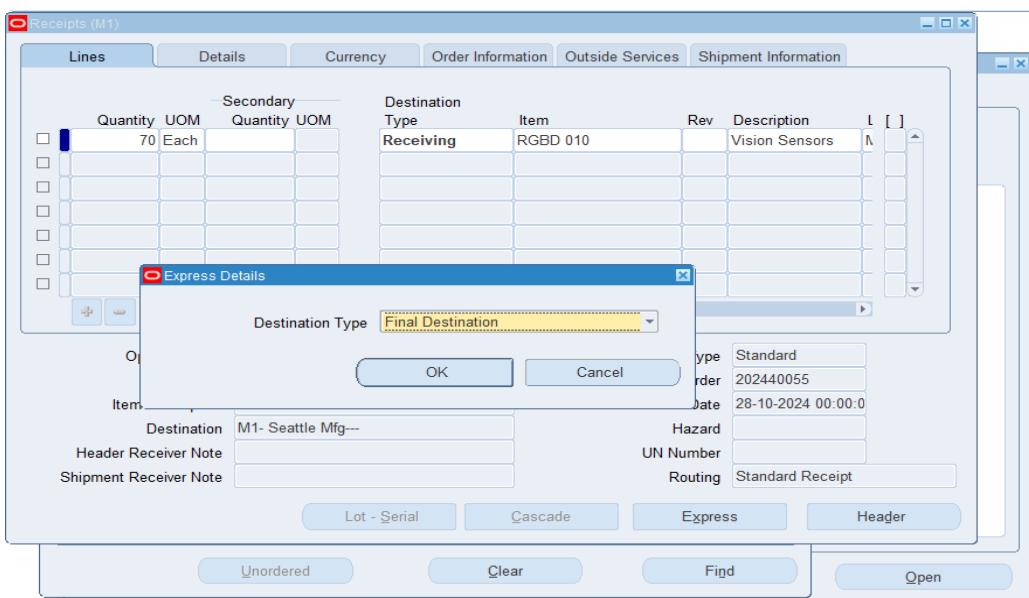
**Header Receiver Note**:

**Shipment Receiver Note**:

Lot - Serial      Cascade      UnExpress      Header

Unordered      Clear      Find      Open

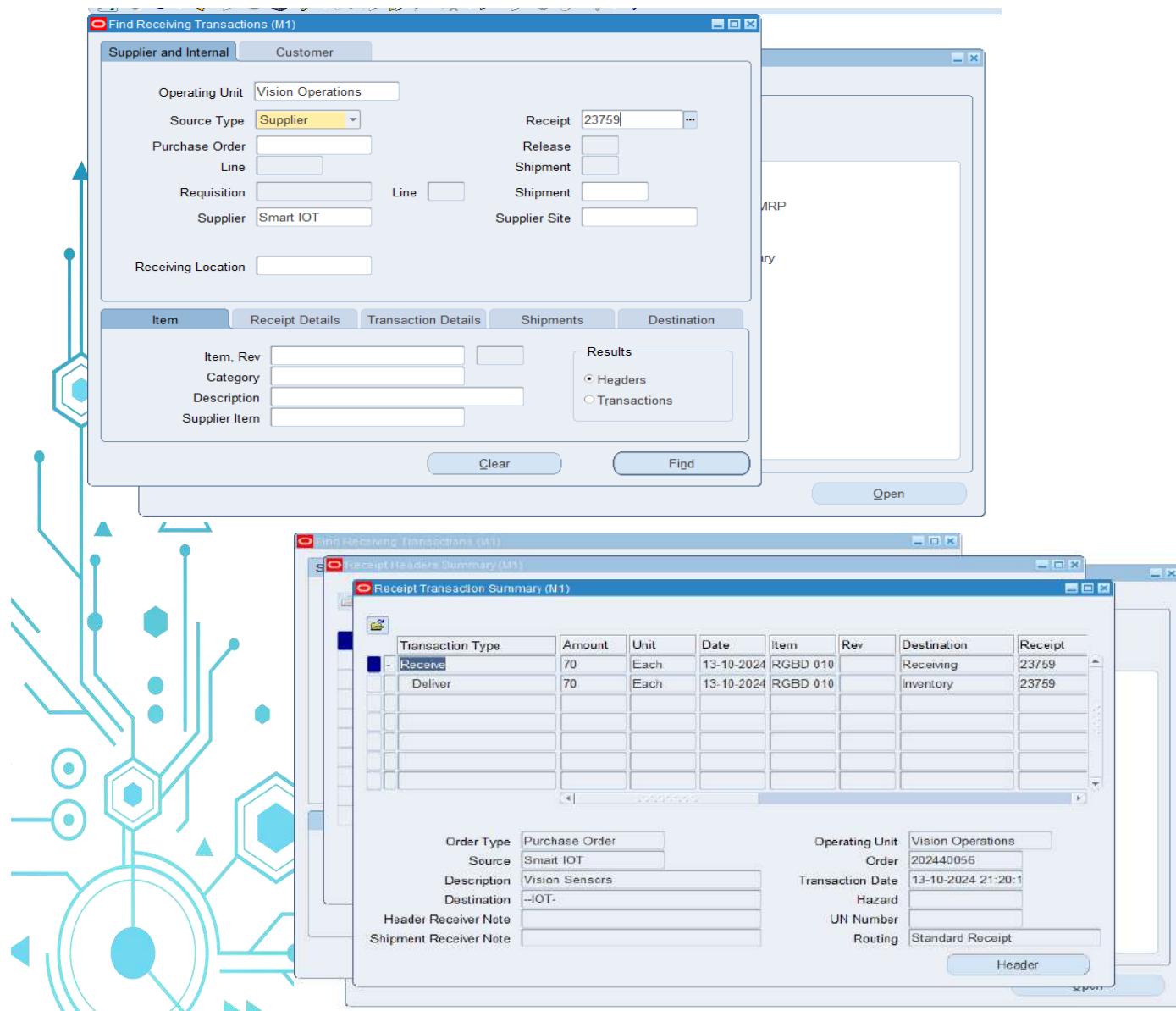
When the destination type is set to "Final Destination," the requestor field on the purchase order or release must be filled out to successfully process the receipt as an express receipt. This requirement helps ensure that the correct requestor is associated with the receipt, which is important for tracking and accountability.



## **Step 4:**

## Receiving Transaction Summary

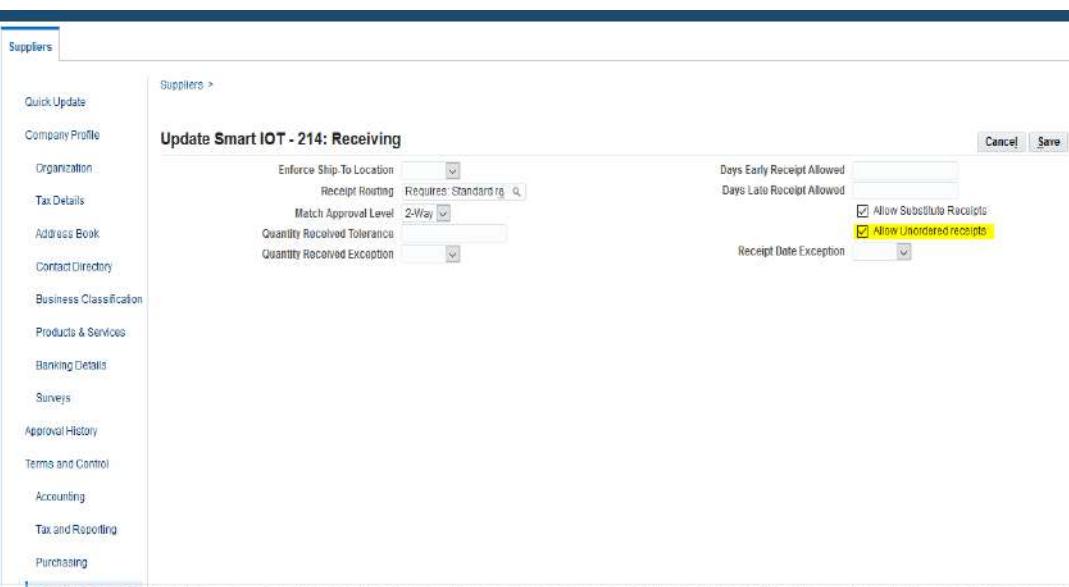
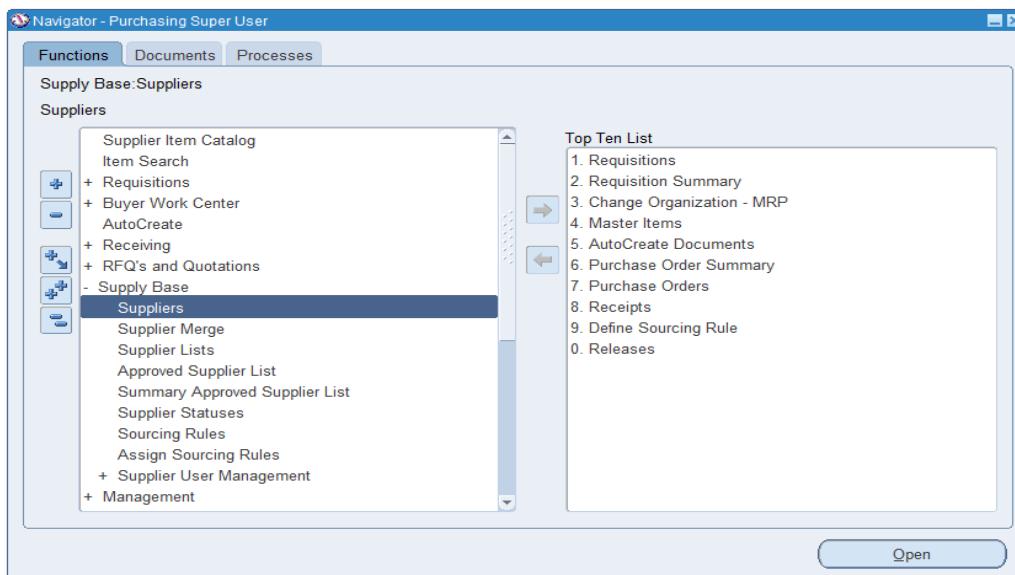
- Navigate to -> Receiving -> Receiving Transactions Summary.
  - Find the receipt using the receipt number.
  - View Transaction Details.



## 13. Unordered Receipt

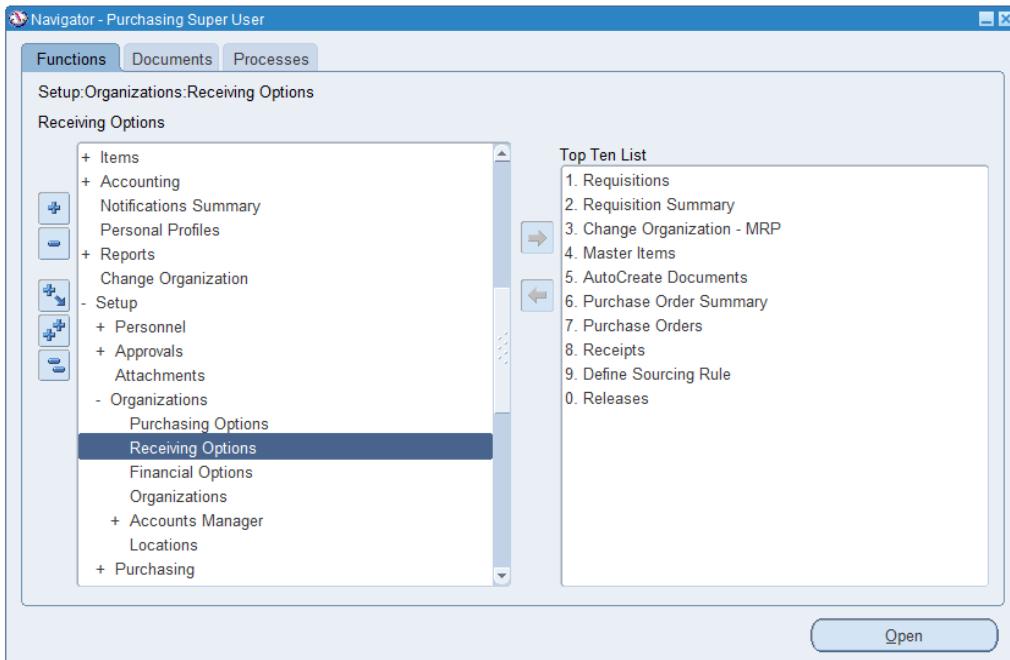
### Step 1:

- Navigate to Supply Base -> Suppliers.
  - Find the Supplier
  - Check Allow Unordered Receipt.
- “Ensure that this box is checked if you want to allow unordered receipts for that supplier.”



### Step 2:

- Navigate to Setup -> Organizations -> Receiving Options.
- In the Receiving Options form, find the checkbox for Allow Unordered Receipt.
- Check the Allow Unordered Receipt option.
- Save the changes.



The screenshot shows the Oracle Receiving Options configuration screen. The top navigation bar includes:
 

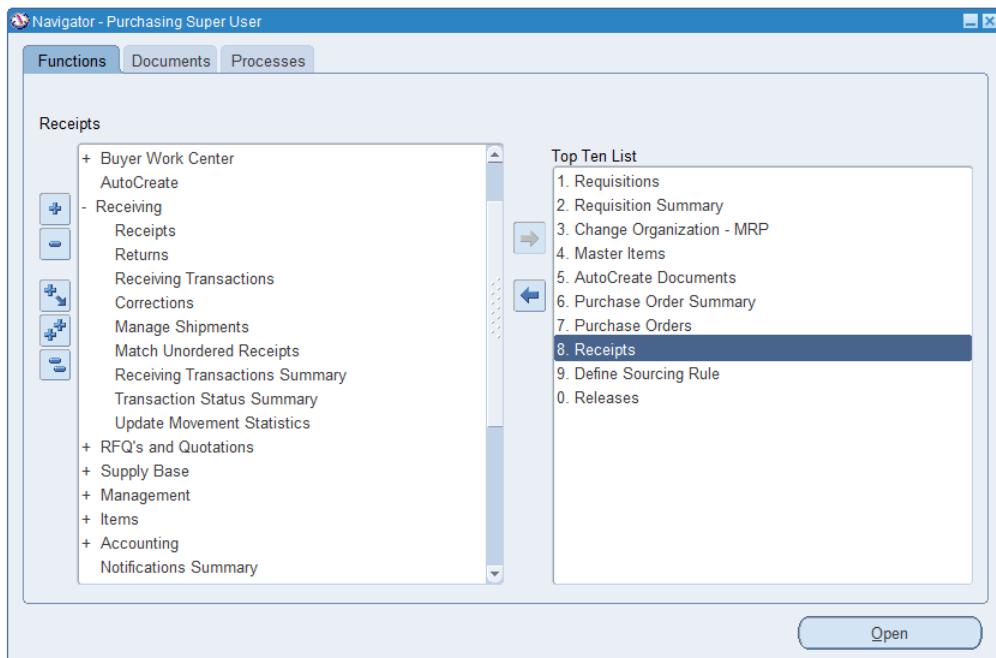
- ORACLE logo
- Star icon
- Gear icon
- Bell icon
- Logged in As YOU.SA.YUSUF
- Help icon
- Close icon

 The main configuration area includes:
 

- Receiving Options** section with a note: \* Indicates required field.
- Accounting** section with fields for Receiving Inventory Account, Retroactive Price Adjustment Account, and Clearing Account.
- Cost Factors** section with checkboxes for Interface to Advanced Pricing and Interface to Transportation Execution.
- Receipt** section with the following configuration:
  - Checkboxes: Allow Unordered Receipts (checked), Allow Express Transactions, Allow Cascade Transactions, Allow Blind Receiving, Validate Serial Numbers on RMA Receipts.
  - Receipt Number Generation: Automatic (dropdown).
  - Receipt Number Type: Numeric (dropdown).
  - Next Receipt Number: 23754 (text input).
  - Validate Lots on RMA Receipts: Restricted (dropdown).

### Step 3: Receipt

- Navigate to -> Receiving -> Receipts.
- In the Find Expected Receipts window, enter the Receipt number.
- Click Find to display the expected receipts associated with the given receipt number.
- Fill out the required information for the unordered receipt that will later be matched to a purchase order or release.

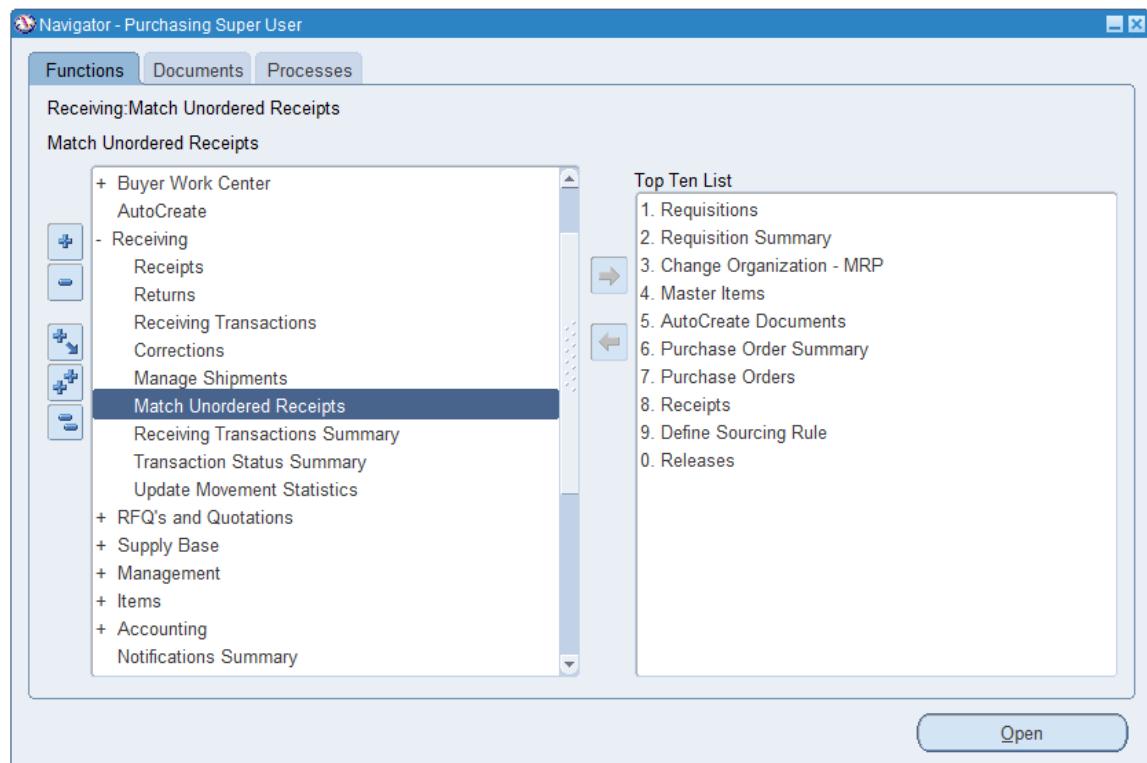


The screenshot shows the 'Receipts (M1)' transaction screen. The 'Lines' tab is active, displaying a grid for entering receipt details. A single row is selected with the quantity '50' and UOM 'Each'. The 'Destination' section shows the item 'THS 003' and description 'Humidity Sensors'. Below the grid, there are additional fields for 'Operating Unit', 'Supplier', 'Item Description', 'Destination', 'Header Receiver Note', and 'Shipment Receiver Note'. At the bottom are buttons for 'Lot - Serial', 'Cascade', 'Express', 'Header', 'Unordered', 'Clear', 'Find', and 'Open'.

#### Step 4:

##### Matching Unordered Receipt

- Navigate to -> Receiving -> Match Unordered Receipts
- After finding the unordered receipts, select the ones you want to match to purchase orders.
- Proceed to match the selected unordered receipts to the corresponding purchase orders as necessary.



**Match Unordered Receipts (M1)**

**Find Unordered Receipts (M1)**

Receipt	23754	...
Supplier		
Customer		
Item		
Description		
Category		
Supplier Item		
Receiver		
Receiving Location		
Transaction Dates		
Clear		
Find		
Receipt Date	Receiving Location	
Receiver	Supplier Item	
NOTIFICATIONS SUMMARY		

**Open**

- Submitting a Request for Receiving Transaction
- Submit a Request
- Status: Complete



Sense the Future

**Requests**

Request Overview					
Actions		Request Details			
Request ID		Name	Parent	Phase	Status
8284450	Receiving Transaction Proc			Completed	Normal
8284448	Material cost transaction w			Completed	Normal
8284447	Receiving Transaction Proc			Completed	Normal
8284445	Material cost transaction w			Completed	Normal
8284439	PO Output for Communicat			Completed	Normal
8284431	Material cost transaction w			Completed	Normal
8284428	Receiving Transaction Proc			Completed	Normal
8284426	ADS (Pay On Receipt Aut			Completed	Normal
8284424	Receiving Transaction Proc			Completed	Normal
8284420	PO Output for Communicat			Completed	Normal

**Actions:**

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

## Step 5: Receipt

- Navigate to -> Receiving -> Receipts.
  - In the Find Expected Receipts window, enter the Receipt number.
  - Click Find to display the expected receipts associated with the given receipt number.
  - Fill out the required information for the unordered receipt that will later be matched to a purchase order or release.

**Receiving Transactions (M1)**

**Find Receiving Transactions (M1)**

Supplier and Internal		Customer	
Operating Unit	Vision Operations	Receipt	23754
Source Type	All	Release	
Purchase Order		Shipment	
Line		Shipment	
Requisition		Supplier Site	
Supplier		Current Location	
<input type="button" value="Item"/> <input type="button" value="Receipt Details"/> <input type="button" value="Transaction Details"/> <input type="button" value="Shipments"/> <input type="button" value="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 type="button" value="Find"/> <input type="button" value="Inspect"/> <input type="button" value="Open"/>			

**Receiving Transactions (M1)**

Lines		Details		Order Information		Outside Services		Currency																									
<table border="1"> <tr> <td>Quantity</td> <td>Secondary</td> <td>Quantity</td> <td>UOM</td> </tr> <tr> <td>50</td> <td>Each</td> <td></td> <td></td> </tr> <tr> <td colspan="4"> <input type="button" value="+"/> <input type="button" value="-"/> </td> </tr> </table>		Quantity	Secondary	Quantity	UOM	50	Each			<input type="button" value="+"/> <input type="button" value="-"/>						<table border="1"> <tr> <td>Location</td> <td>Person</td> <td>Subinventory</td> <td>Locator</td> </tr> <tr> <td></td> <td></td> <td>SENS 7</td> <td></td> </tr> <tr> <td colspan="4"> <input type="button" value="&lt;"/> <input type="button" value="&gt;"/> </td> </tr> </table>		Location	Person	Subinventory	Locator			SENS 7		<input type="button" value="&lt;"/> <input type="button" value="&gt;"/>							
Quantity	Secondary	Quantity	UOM																														
50	Each																																
<input type="button" value="+"/> <input type="button" value="-"/>																																	
Location	Person	Subinventory	Locator																														
		SENS 7																															
<input type="button" value="&lt;"/> <input type="button" value="&gt;"/>																																	
Operating Unit: Vision Operations Supplier: Smart IOT Description: Humidity Sensors Destination: --- Header Receiver Note: <input type="text"/> Shipment Receiver Note: <input type="text"/>				Receipt: 23754 Order: 202440054 Parent Type: Match Inspection: Not Inspected - Standard Current Location: M1-Seattle Mfg Hazard Class: <input type="text"/>																													
				<input type="button" value="Lot-Serial"/> <input type="button" value="Cascade"/> <input type="button" value="Express"/> <input type="button" value="Inspect"/>																													

## Step 6: Receiving Transaction Summary

- Navigate to -> Receiving -> Receiving Transactions Summary.
- Find the receipt using the receipt number
- View Transaction Details

**Find Receiving Transactions (M1)**

**Supplier and Internal**   **Customer**

Operating Unit	Vision Operations	Receipt	23754
Source Type	All	Release	<input type="text"/>
Purchase Order	<input type="text"/>	Shipment	<input type="text"/>
Line	<input type="text"/>	Shipment	<input type="text"/>
Requisition	<input type="text"/>	Supplier Site	<input type="text"/>
Supplier	<input type="text"/>		
Receiving Location	<input type="text"/>		

**Item**   **Receipt Details**   **Transaction Details**   **Shipments**   **Destination**

Item, Rev	<input type="text"/>	<input type="button"/>	Results
Category	<input type="text"/>		<input checked="" type="radio"/> Headers
Description	<input type="text"/>		<input type="radio"/> Transactions
Supplier Item	<input type="text"/>		

**Clear**   **Find**   **Open**

**Find Receiving Transactions (M1)**

**Receipt Headers Summary (M1)**

**Receipt Transaction Summary (M1)**

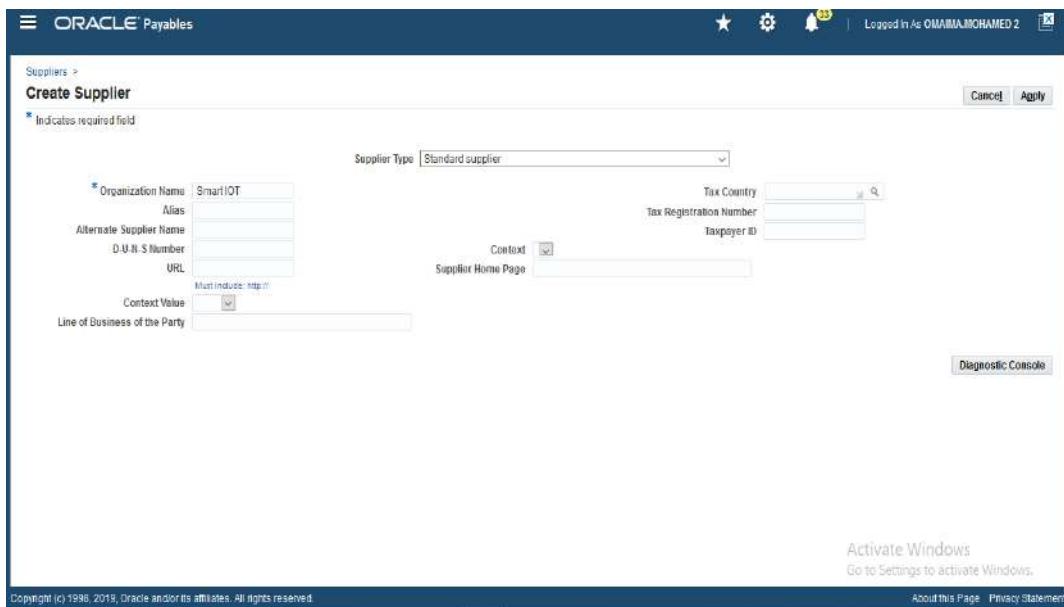
Transaction Type	Amount	Unit	Date	Item	Rev	Destination	Receipt
- Unordered receipt	50	Each	13-10-2024	THS 003		Receiving	23754
Match	50	Each	13-10-2024	THS 003		Receiving	23754
Deliver	50	Each	13-10-2024	THS 003		Inventory	23754

**Order Type** Purchase Order   **Operating Unit**   
**Source** Smart IOT   **Order**   
**Description** Humidity Sensors   **Transaction Date** 13-10-2024 19:50:5  
**Destination** ---   **Hazard**   
**Header Receiver Note**   
**Shipment Receiver Note**  **UN Number**   
**Routing** Standard Receipt **Header**

## 14. Create a Supplier

### Step 1:

- Navigate to Supply Base -> Suppliers.
- Enter Supplier Details:  
Organization Name: Smart IOT.  
Supplier Type: Standard Supplier.
- Save.



Suppliers >  
**Create Supplier**

\* Indicates required field

Supplier Type: Standard supplier

Organization Name: Smart IOT  
Alias:  
Alternate Supplier Name:  
D-U-N-S Number:  
URL:  
Mutinode: http://  
Context Value:  
Line of Business of the Party:

Tax Country:  Tax Registration Number:   
Supplier Home Page:

Diagnostic Console

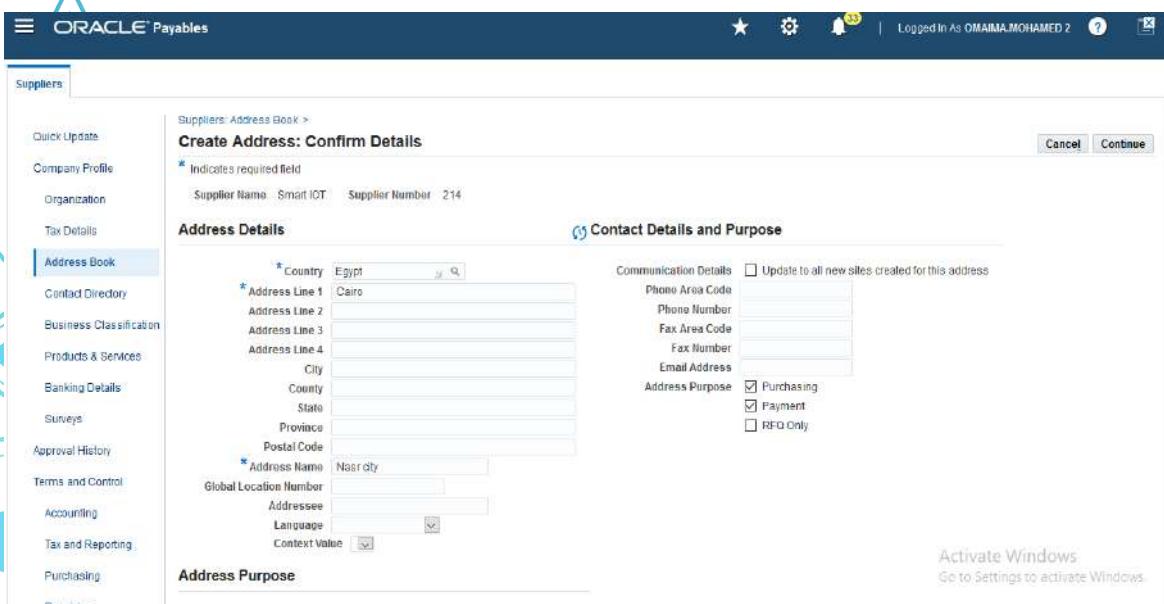
Activate Windows  
Go to Settings to activate Windows.

About this Page Privacy Statement

### Step 2:

Add Address Information:

- Navigate to the Supplier's Address Section.
- After entering the basic supplier details, go to the Address tab.
- Enter the Address Information:
  - Country: Egypt.
  - Address Name: Nasr City.
- Save the changes after inputting the address.



Suppliers

Suppliers: Address Book >  
**Create Address: Confirm Details**

\* Indicates required field

Supplier Name: Smart IOT Supplier Number: 214

**Address Details**

\* Country: Egypt   
Address Line 1: Cairo  
Address Line 2:  
Address Line 3:  
Address Line 4:  
City:  
County:  
State:  
Province:  
Postal Code:  
\* Address Name: Nasr city  
Global Location Number:  
Addressee:  
Language:   
Context Value:

**Contact Details and Purpose**

Communication Details:  Update to all new sites created for this address  
Phone Area Code:   
Phone Number:   
Fax Area Code:   
Fax Number:   
Email Address:

Address Purpose:  Purchasing  
 Payment  
 RFQ Only

Activate Windows  
Go to Settings to activate Windows.

## Step 3:

### Add Invoice Management:

- Navigate to the Invoice Management Section.
- Enter Invoice Management Information:
  - Invoice Currency: US Dollar.
  - Match Option: Purchase Order.
  - Payment Currency: US Dollar.
  - Terms: AP NET 30% 70%.
  - Pay Group: AP Group.
- Save the payment details.

Changes to Invoice Management have been saved.

**Update Smart IOT - 214: Invoice Management**

Invoice Currency: <b>USD</b>	Invoice Amount Limit: <b> </b>	Invoice Match Option: <b>Purchase Order</b>	Hold from Payment: <input type="checkbox"/> All invoices <input type="checkbox"/> Unmatched invoices <input type="checkbox"/> Unvalidated invoices	<b>Cancel</b> <b>Save</b>
<b>Invoice Payment Terms</b>				
Payment Currency: <b>USD</b>	Payment Priority: <b>99</b>	Terms: <b>AP NET 30% 70%</b>	Pay Group: <b>AP GROUP</b>	<input type="checkbox"/> Always Take Discount <input type="checkbox"/> Exclude Freight From Discount <input type="checkbox"/> Create Interest Invoice
Terms Date Basis: <b>Invoice</b>	Pay Date Basis: <b>Due</b>			
<b>Supplier Sites</b>				
Site Status: <b>Active</b>	Site Name: <b> </b>	Operating Unit: <b> </b>	<b>Go</b>	
<b>Invoicing</b> <b>Payment</b> <b>Terms</b> <b>Supplier Preferences</b>				
<b>Create</b> <b>... Site Name</b> <b>Operating Unit</b> <b>Payment Currency</b> <b>Payment Priority</b> <b>Pay Group</b> <b>Deduct Bank Charge from Payment</b> <b>Cairo</b> <b>Vision Operations</b> <b>USD</b> <b>99</b> <b>AP GROUP</b> <b>No</b>				
<b>Activate Windows</b> <small>Go to Settings to activate Windows.</small>				

## Step 4:

### Receiving Information:

- Navigate to the Receiving Information Section.
- After saving the payment details, switch to the Receiving tab.
- Enter the Receiving Information:
  - Receipt Routing: Standard.
  - Match Approval Level: 2-Way Match.
- Save the receiving details.

**ORACLE Payables**

Logged In As OMAIMA.MOHAMED 2

**Suppliers**

**Update Smart IOT - 214: Receiving**

Quick Update	Enforce Ship-To Location: <input checked="" type="checkbox"/>	Days Early Receipt Allowed: <b> </b>	Cancel	Save
Company Profile	Receipt Routing: <b>Requires Standard</b>	Days Late Receipt Allowed: <b> </b>		
Organization	Match Approval Level: <b>2-Way</b>	<input type="checkbox"/> Allow Substitute Receipts		
Tax Details	Quantity Received Tolerance: <b> </b>	<input type="checkbox"/> Allow Unordered receipts		
Address Book	Quantity Received Exception: <b> </b>	Receipt Date Exception: <b> </b>		
Contact Directory				
Business Classification				
Products & Services				
Banking Details				
Surveys				
Approval History				
Terms and Control				
Accounting				
Tax and Reporting				
Purchasing				
Receiving				
Payment Details				
Relationship				
<b>Receiving</b>				

**Activate Windows**  
Go to Settings to activate Windows.

## Step 5:

### Payment details:

- Navigate to Payment details
  - payment method: Check

**Update Smart IOT - 214: Payment Details**

**Payment Details**

**Payment Methods**

(TIP) You can choose one payment method to default on documents for the payee. A default payment method is optional.

Payment Method	Default	End Date
Bill Payable	<input type="checkbox"/>	<input type="button" value="..."/>
Check	<input checked="" type="checkbox"/> Default	<input type="button" value="..."/>
Cash/Check Payment method	<input type="checkbox"/>	<input type="button" value="..."/>
Electronic	<input type="checkbox"/>	<input type="button" value="..."/>
Outsourced Check	<input type="checkbox"/>	<input type="button" value="..."/>
Wire	<input type="checkbox"/>	<input type="button" value="..."/>

**Payment Attributes**

**Payment Delivery Attributes**   **Payment Specifications**   **Separate Remittance Advice Delivery**

**Activate Windows**  
Go to Settings to activate Windows.

Service Level:  Settlement Priority:

## Step 6:

### Bill To Information:

- Navigate to Purchasing.
- From the Purchasing Super User responsibility, navigate to Purchasing.
- Enter the Billing Information:
  - Bill To: M1-Seattle Mfg.
- Save the billing details to confirm the setup.

**Update Smart IOT - 214: Purchasing**

**Purchase Order Hold**

- All New Orders
- Create Debit Memo from RTS Transaction

**Supplier Sites**

Site Status: Active   Site Name:  Operating Unit:  Go

**Purchasing**   **Self Billing**   **Freight**

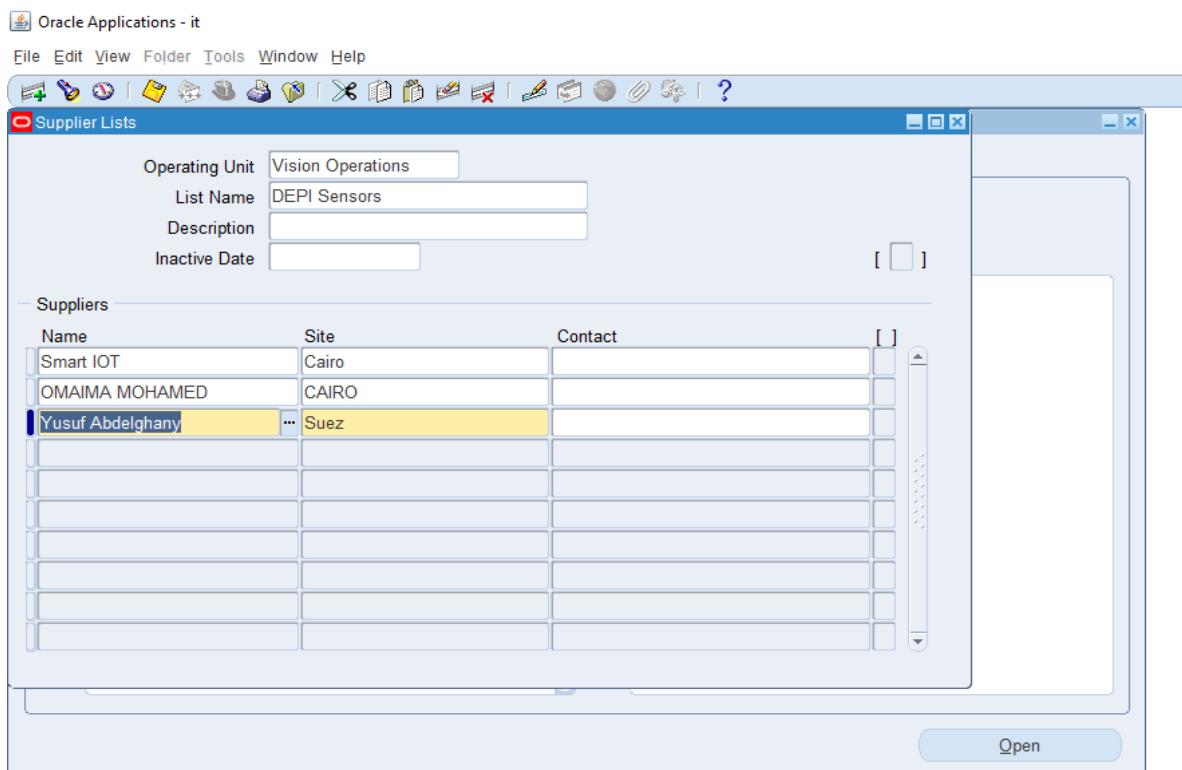
**Create**  

Site Name	Operating Unit	Ship-To Location	Bill-To Location	Ship Via	Acknowledgment Lead Time (Days)
Cairo	Vision Operations	<input type="button" value="..."/>	M1-Seattle Mfg. <input type="button" value="..."/>	Schneider <input type="button" value="..."/>	<input type="button" value="..."/>

**Activate Windows**  
Go to Settings to activate Windows.

## 15. Create a Supplier List:

- Navigate to Supply Base -> Supplier List.
- Create a New Supplier List:
  - Name: DEPI Sensors.
- Define List Details
- Add the suppliers you want to include in this list (e.g., Smart IOT).
- You can specify categories, supplier sites, and other applicable details.
- Save the supplier list once completed.



## 16. Long Purchase Order (PO) Cycle:

### Step 1:

#### Create a Requisition:

- Navigate to Requisition > Requisition.
- Enter the required information in the Requisition Header (such as Description, Type, Requester).
- Provide Item or Category, Quantity, Price, and other line-specific details in the requisition lines section.



Sense the Future

File Edit View Folder Tools Actions Window Help

**Requisitions - [New]**

Operating Unit	Vision Operations	Type	Purchase Requi	Preparer	OMAIMA MOHAMED 2,
Number	202430049	Status	Incomplete	Total	USD 120.00
Description	PO long cycle				

Lines      Source Details      Details      Currency

**RFQ Required**

Num	Note to Buyer	Buyer	Supplier Item	Document Type
1				

**Destination Type** Inventory      **Source** Supplier  
**Requester** OMAIMA MOHAMED 2,      **Supplier** Smart IOT  
**Organization** Seattle Manufacturing      **Site** Cairo  
**Location** M1- Seattle Mfg      **Contact**   
**Subinventory** DEP1      **Phone**

Outside Services      Catalog      Distributions      Approve...      Open

## Step 2:

## Approve Requisition:

- Submit the requisition for approval. If using approval hierarchies, it will route to the appropriate approvers.

Oracle Applications - it

File Edit View Folder Tools Actions Window Help

Approve Document - 202430049

**Approval Details** Additional Options

**Encumbrance**

Reserve       Unreserve  
 Use GL Override       Use Document GL Data to Unreserve

Unreserve Date:   
 Accounting Data:

**Approval**

Submit for Approval      Forward From:   
 Forward      Approval Path:   
 Change Summary:   
 Note:

**Transmission Methods**

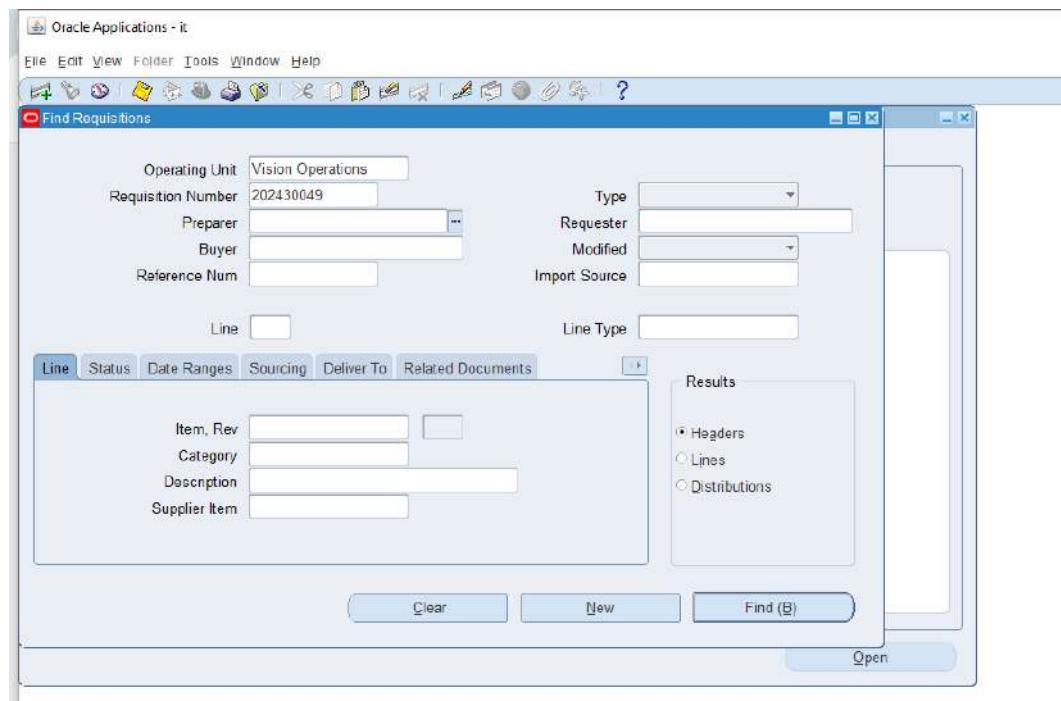
Print       XML  
 Fax       EDI  
 E-Mail      FAX Number:   
 E-Mail Address:

OK Cancel

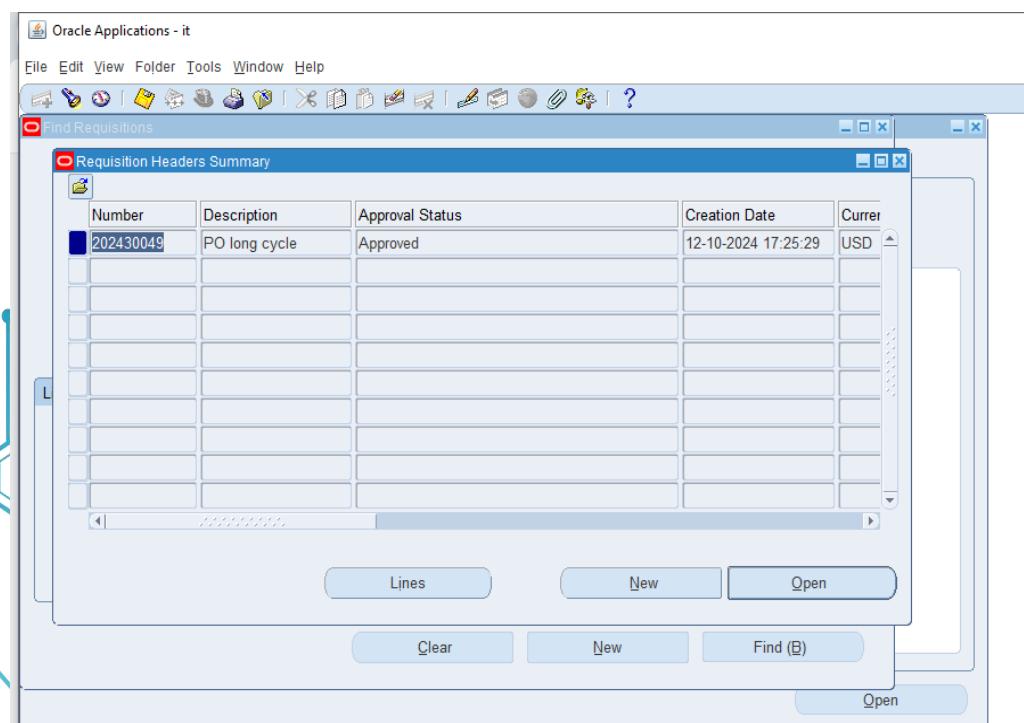
### **Step 3:**

## Find a requisition

- Navigate to Requisitions > Requisition Summary.
  - In the Requisition Number field, enter 2022430049.
  - Click on Find to search for the requisition.



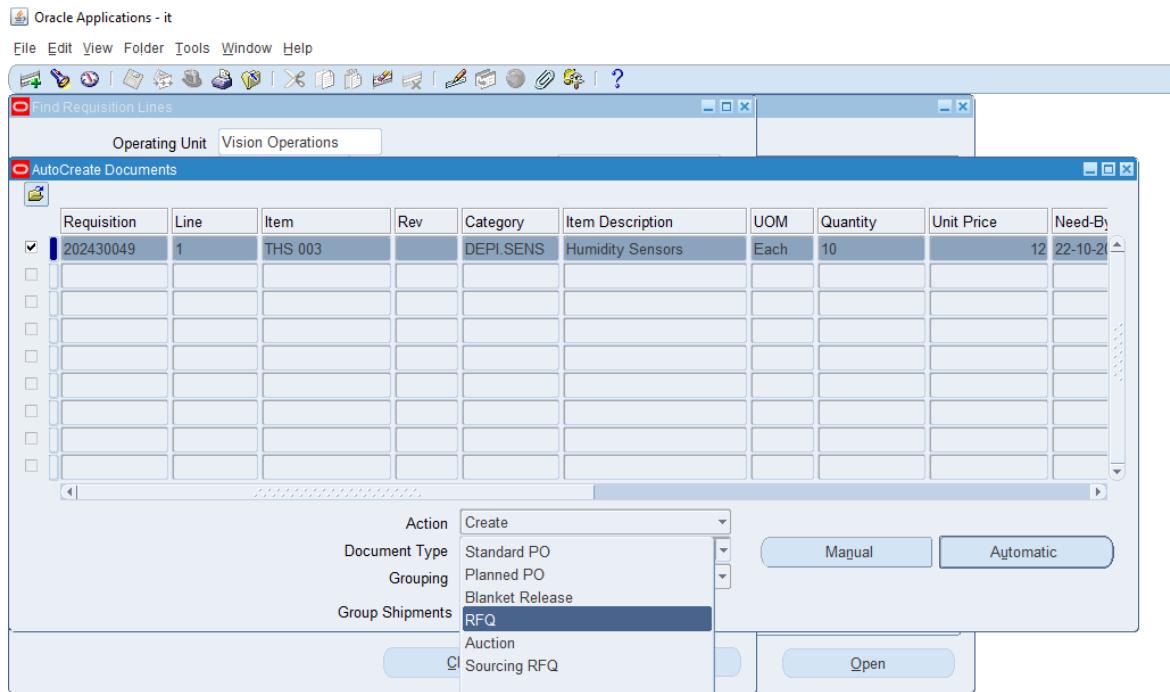
- View Approval Status.
  - the status of the purchase order has changed to **Approved**.



## Step 4:

- Search with requisition number
  - In the Requisition Number field, input 2022430038.
  - Click the Find button to retrieve the details of the requisition.

- change the document type to RFQ and generate it automatically.
- Select the Requisition Line:
  - In the Requisition Summary or Requisition Lines window, select the line item you want to change.
- Change Document Type:
  - Look for the option to change the Document Type.
  - Select RFQ from the list.
- Generate RFQ Automatically:
  - Click the Automatic button to automatic generation of the RFQ.

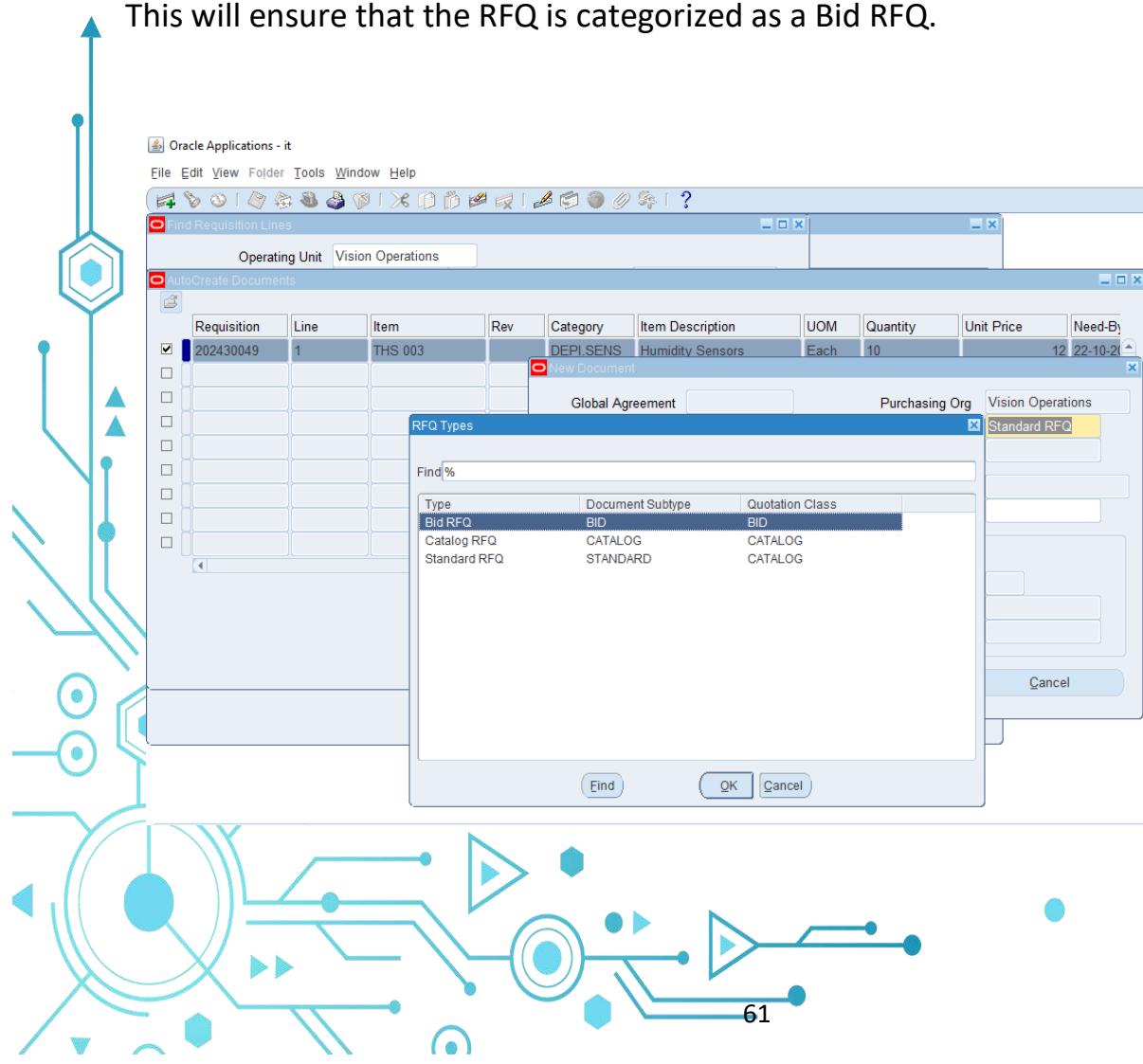


## **Step 5:**

## Choose the RFQ type to Bid RFQ

- Select the RFQ Type:
    - In the RFQ creation window, locate the field for **RFQ Type**.
    - From the dropdown menu or selection options, choose **Bid RFQ**.
    - Click **Save**

This will ensure that the RFQ is categorized as a Bid RFQ.



## Step 6:

- Open the AutoCreate

Oracle Applications - it

File Edit View Folder Tools Window Help

**AutoCreate to RFQs - 202410007**

Operating Unit	Vision Operations		
Number	202410007	Type	Bid RFQ
Ship-To	Youstra M1- Seattle	Bill-To	Youstra M1- Seattle
Due Date		Created	12-10-2024
Description		Status	In Process
<input type="checkbox"/> Quote Approval Required		Reply Via	
Quote Effectivity		Close Date	
		Buyer	OMAIMA MOHAMED 2
		Currency	USD

**Items**

Num	Type	Item	Rev	Category	Description	UOM
1	Goods	THS 003		DEPI.SENS	Humidity Sensors	Each

Item THS 003 Humidity Sensors

Currency... Terms Shipments Suppliers Open

- Select a supplier to send the RFQ (Request for Quotation)

Oracle Applications - it

File Edit View Folder Tools Window Help

**AutoCreate to RFQs - 202410007**

**RFQ Suppliers - 202410007**

Seq	Supplier	Site	Contact	Printed	Count	Respon
1				<input checked="" type="checkbox"/>		

Add From List...

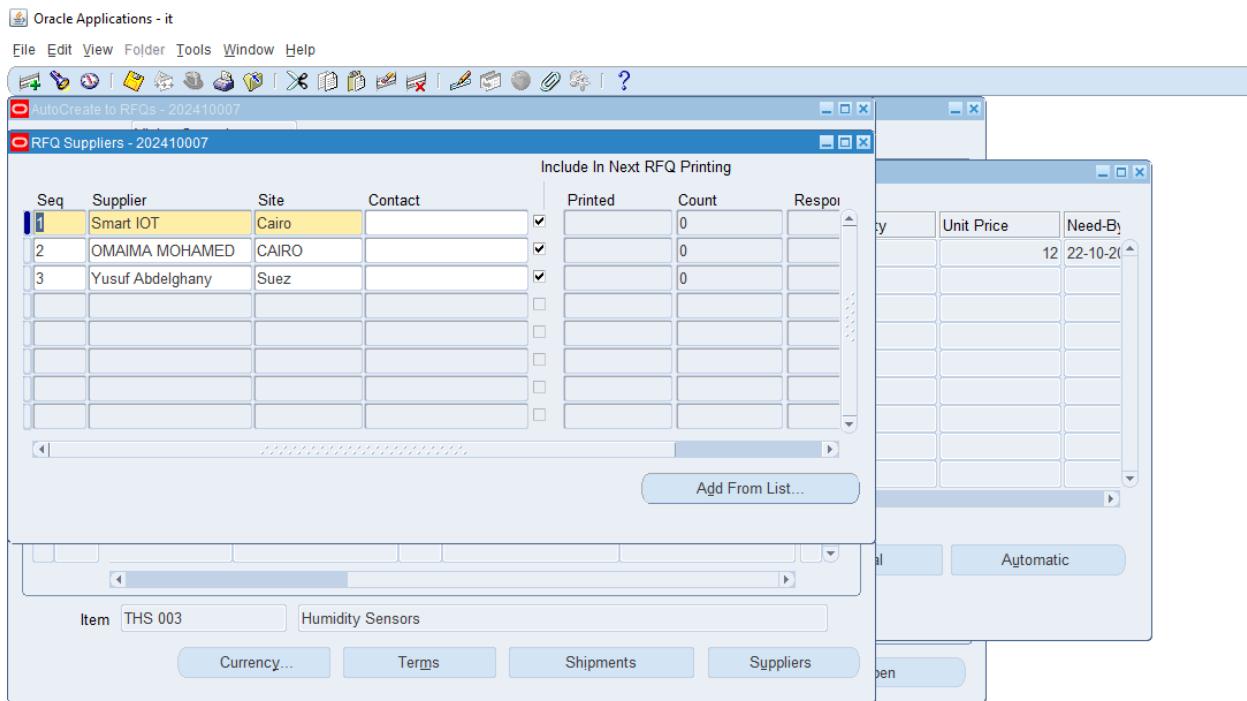
**Supplier Lists**

List	Description	Supplier Count
DEPI Sensors	Surgical, Patient and Lab Gown	3
Gowns	Hard Drive Suppliers	2
Hard Drives	IV Products and Supplies	3
IV Products	Monitor Suppliers	2
Monitors	Networking Supplier List	3
Networking	Plastics Supplier List	2
Plastics	RFQ List for Shop/Misc. Supplie	2
Shop Supplies	Wound care supplies	2
Wound Care		

Apply Cancel

Item THS 003 Humidity Sensors

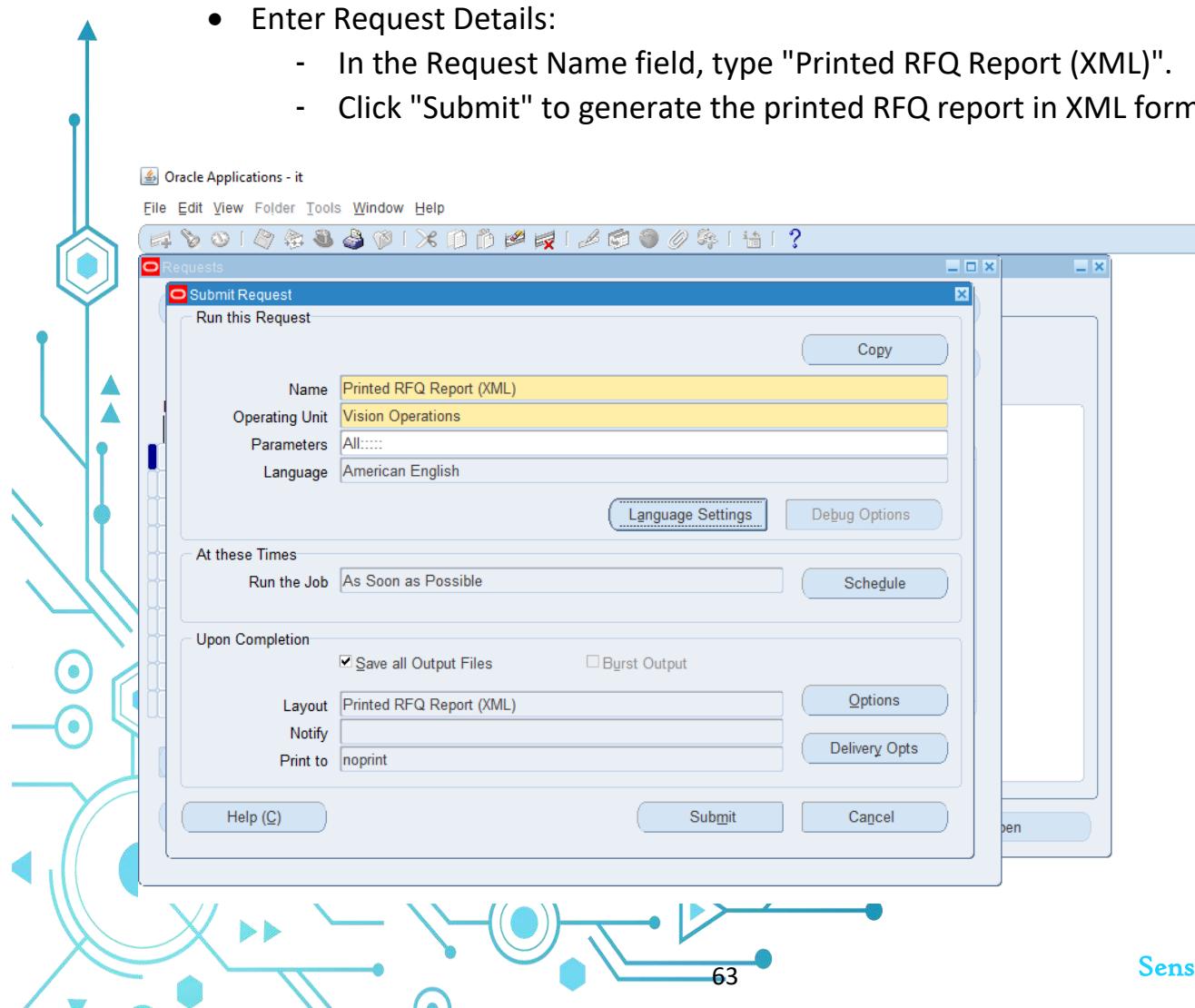
Currency... Terms Shipments Suppliers Open



## **Step 7:**

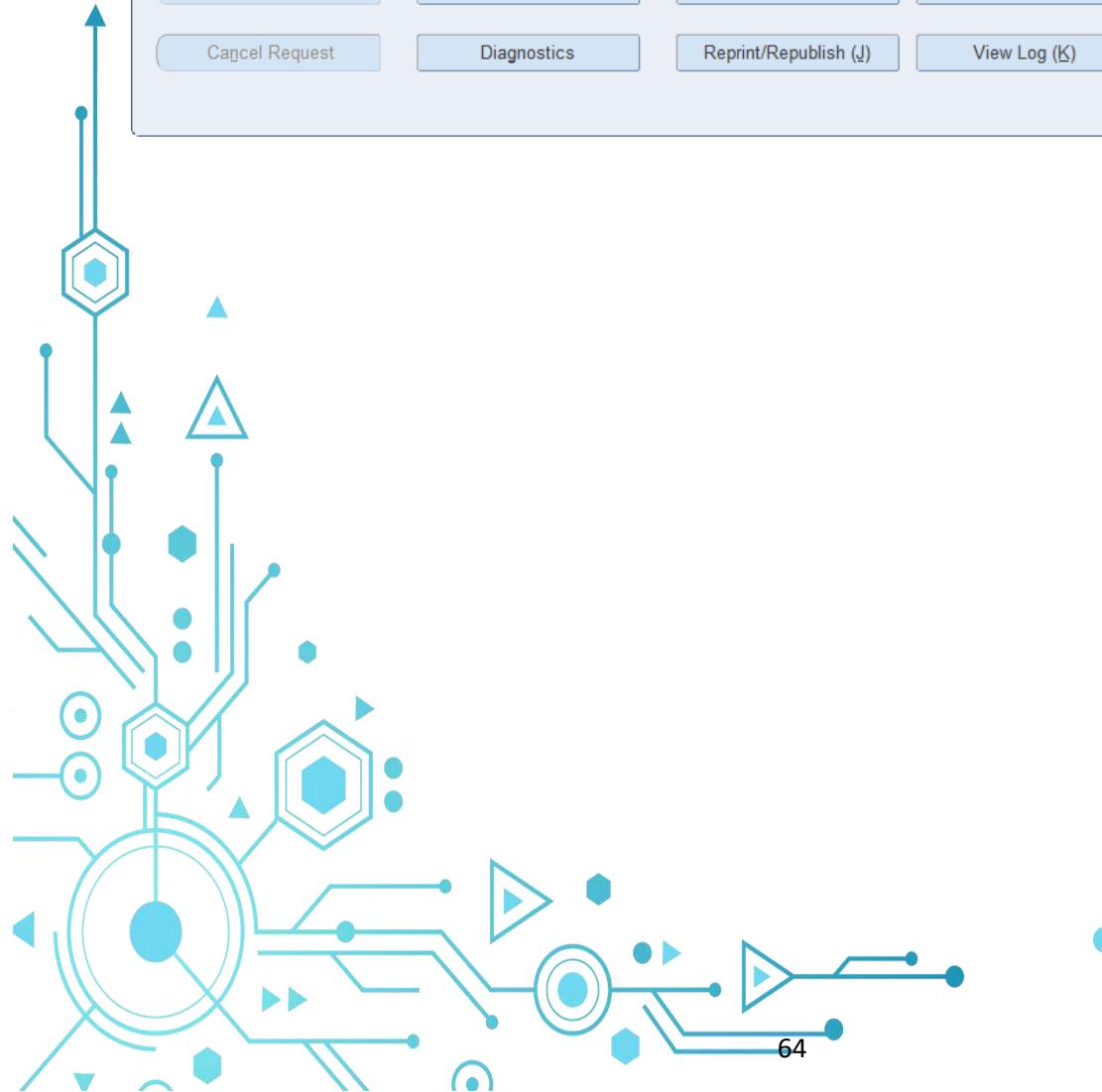
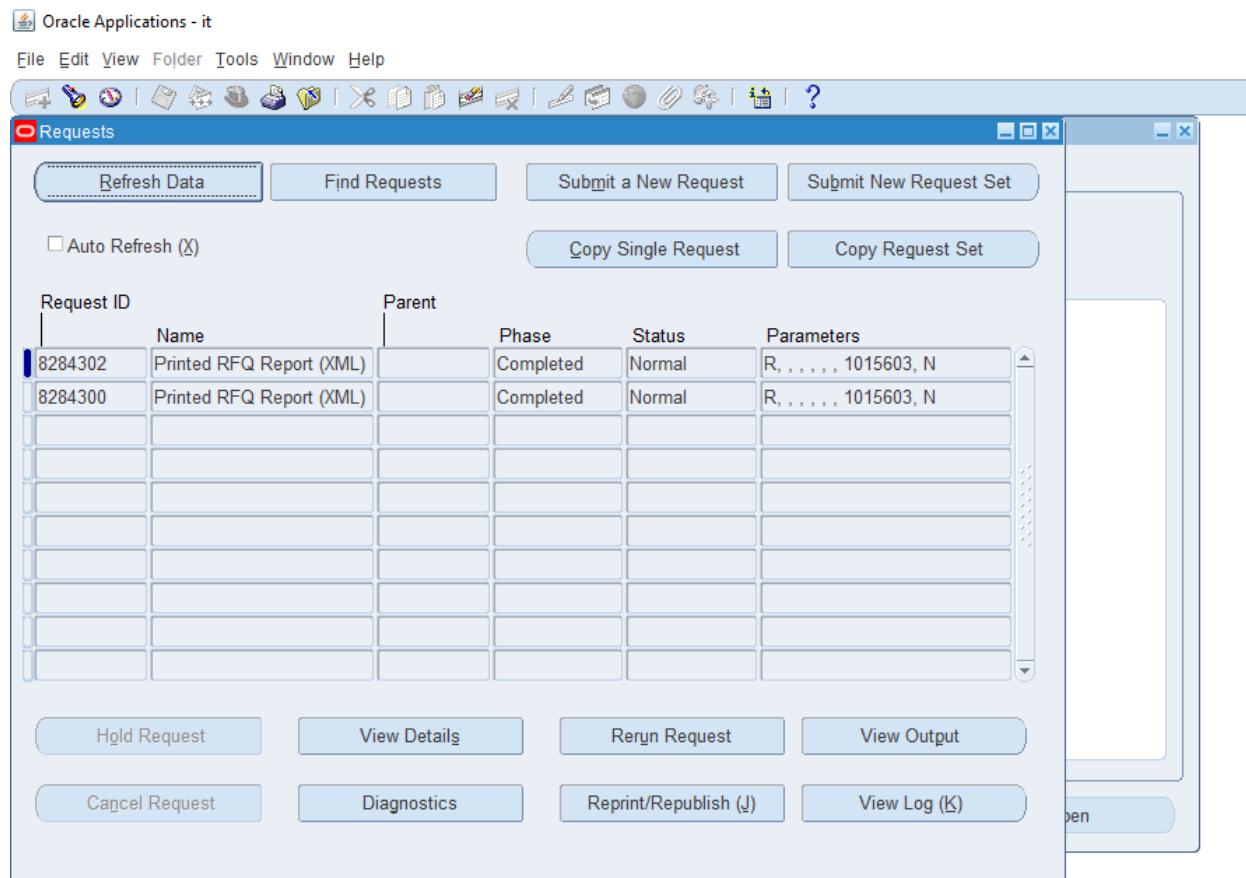
Submitting a new request to generate the printed RFQ report in XML format:

- "View" Menu:
    - Select "**Request**".
    - Click on "**Submit a New Request**".
  - Enter Request Details:
    - In the Request Name field, type "Printed RFQ Report (XML)".
    - Click "Submit" to generate the printed RFQ report in XML format.



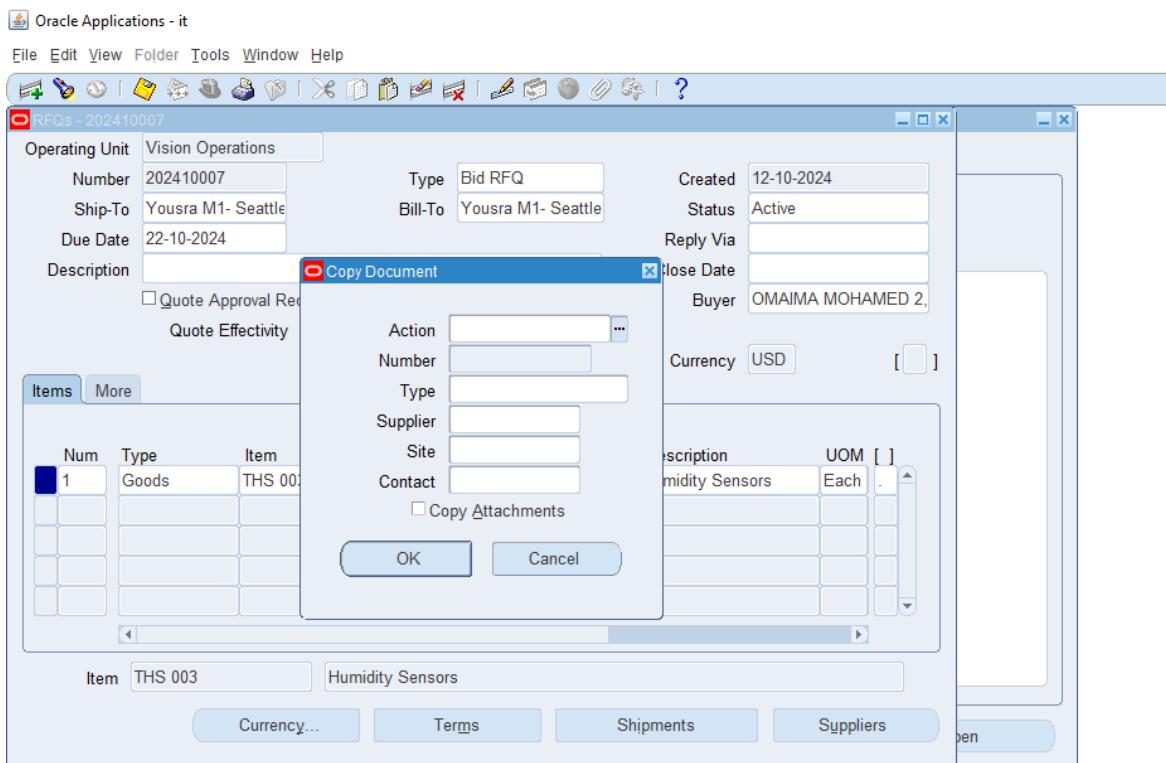
- RFQ Status Update

The RFQ status has been updated to "Printed," indicating that the RFQ document has been successfully generated and printed. This status change after submitting the request for the Printed RFQ Report (XML). The RFQ is now ready to be distributed to suppliers for further action. Request phase is marked as "Completed" and request status is set to "Normal."



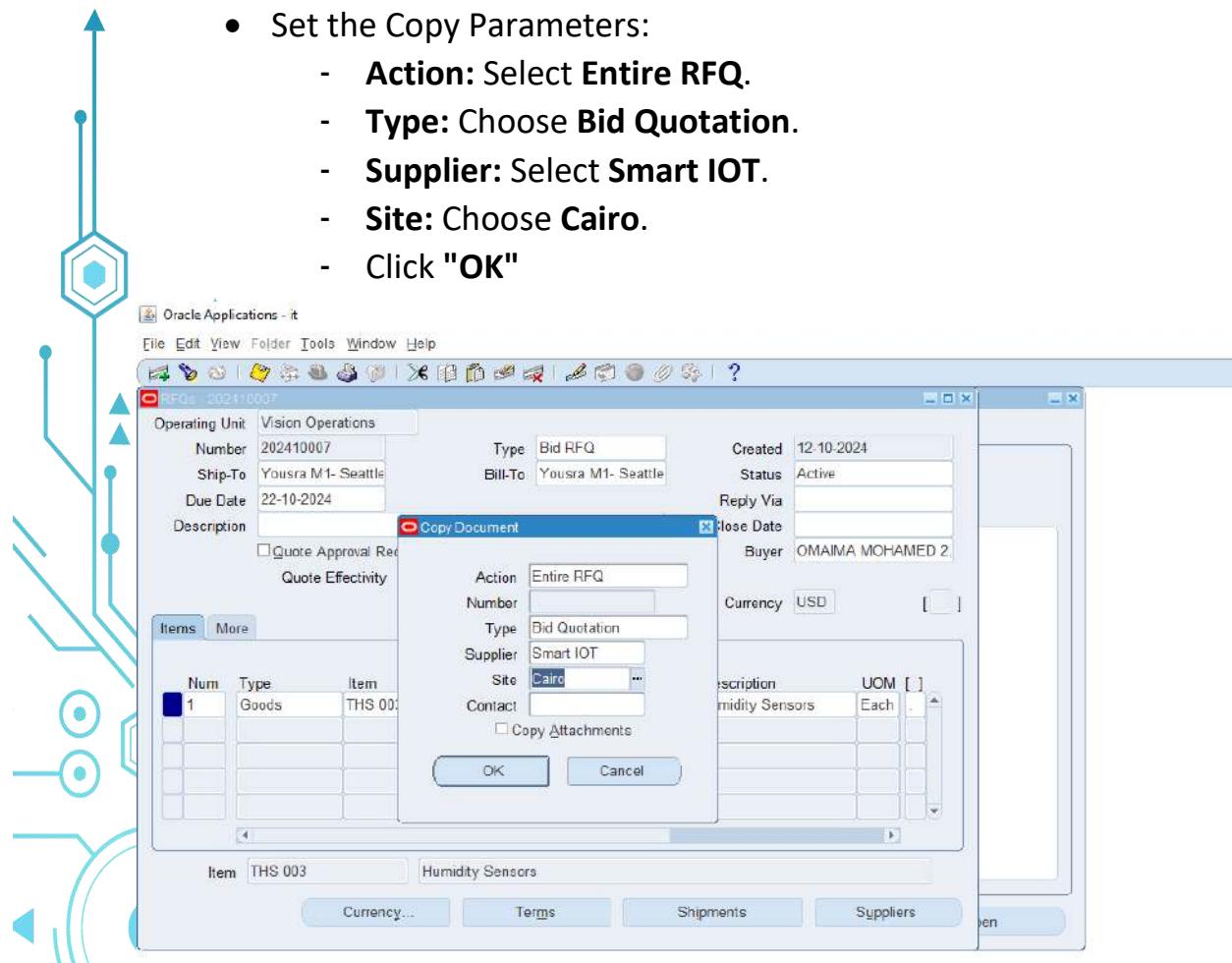
## A. Copying a Document

- From the Tools menu, select "Copy Document".



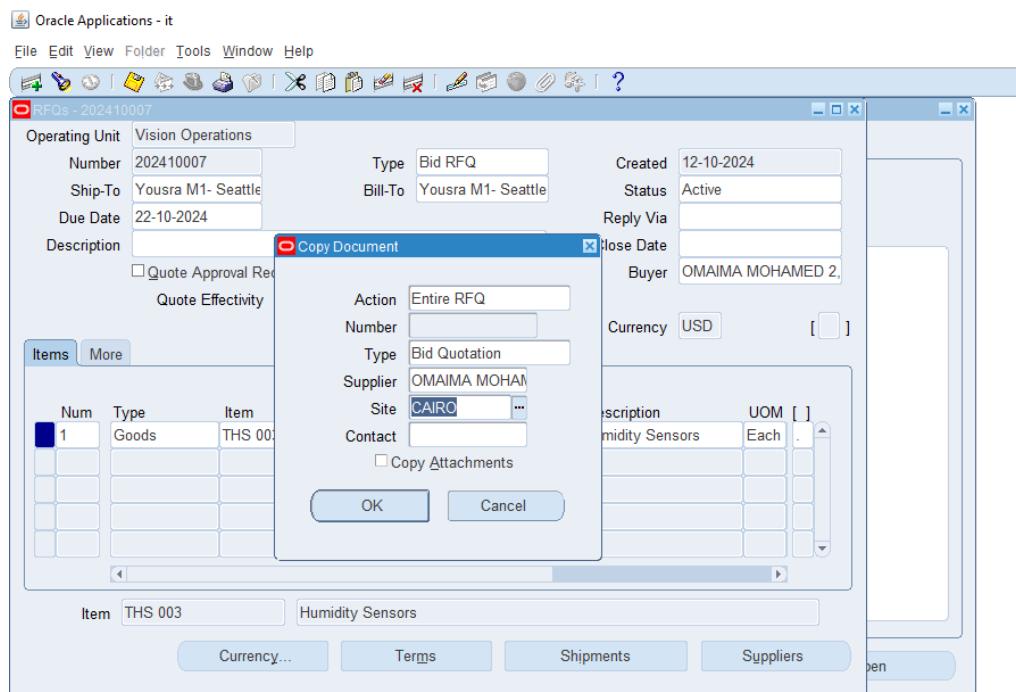
## B. Copy Document Process for RFQ

- Set the Copy Parameters:
  - Action:** Select **Entire RFQ**.
  - Type:** Choose **Bid Quotation**.
  - Supplier:** Select **Smart IOT**.
  - Site:** Choose **Cairo**.
  - Click "**OK**"

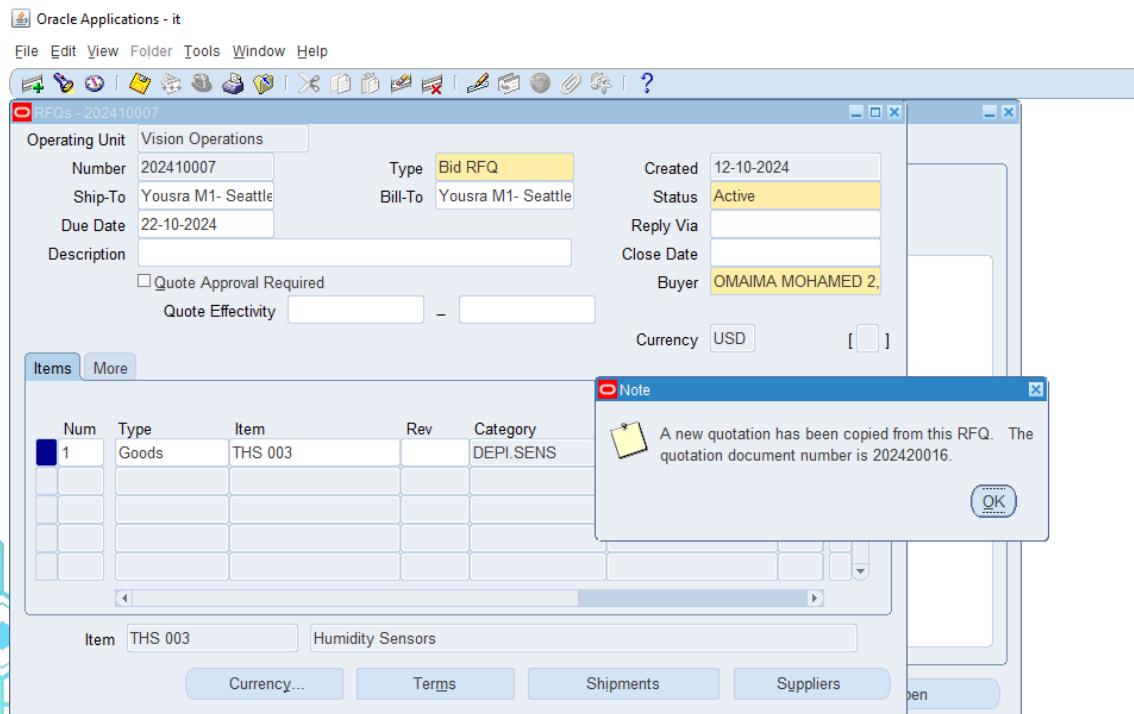


## C. Copy Document Process to Another Supplier

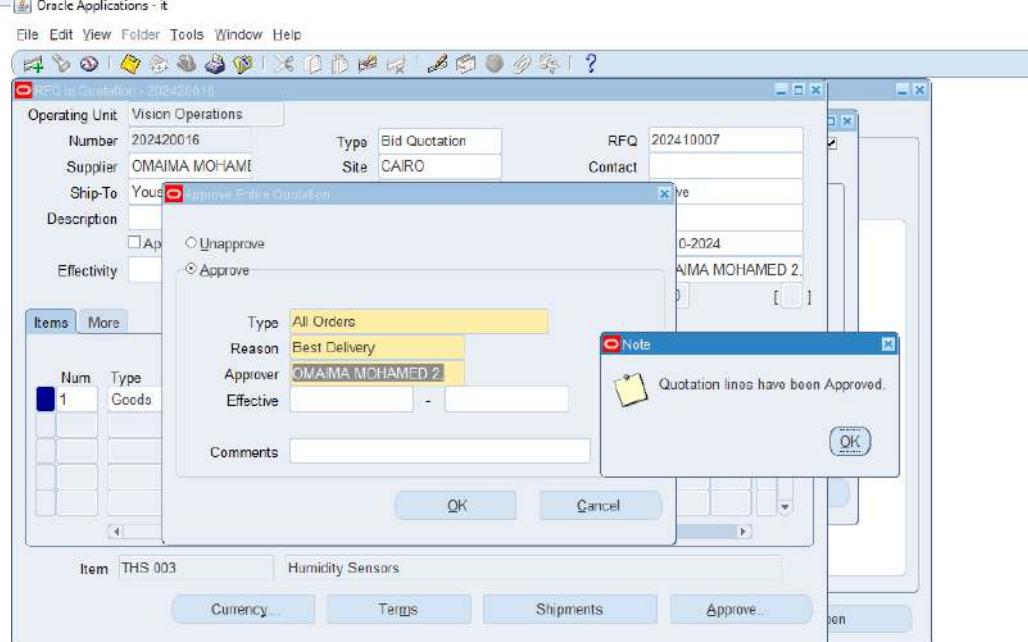
- Set the Copy Parameters:
  - Action:** Select Entire RFQ.
  - Type:** Choose Bid Quotation.
  - Supplier:** Enter Omaima Mohamed.
  - Site:** Set to Cairo.
  - Click "OK"**



- The new quotation has been successfully copied from the RFQ.

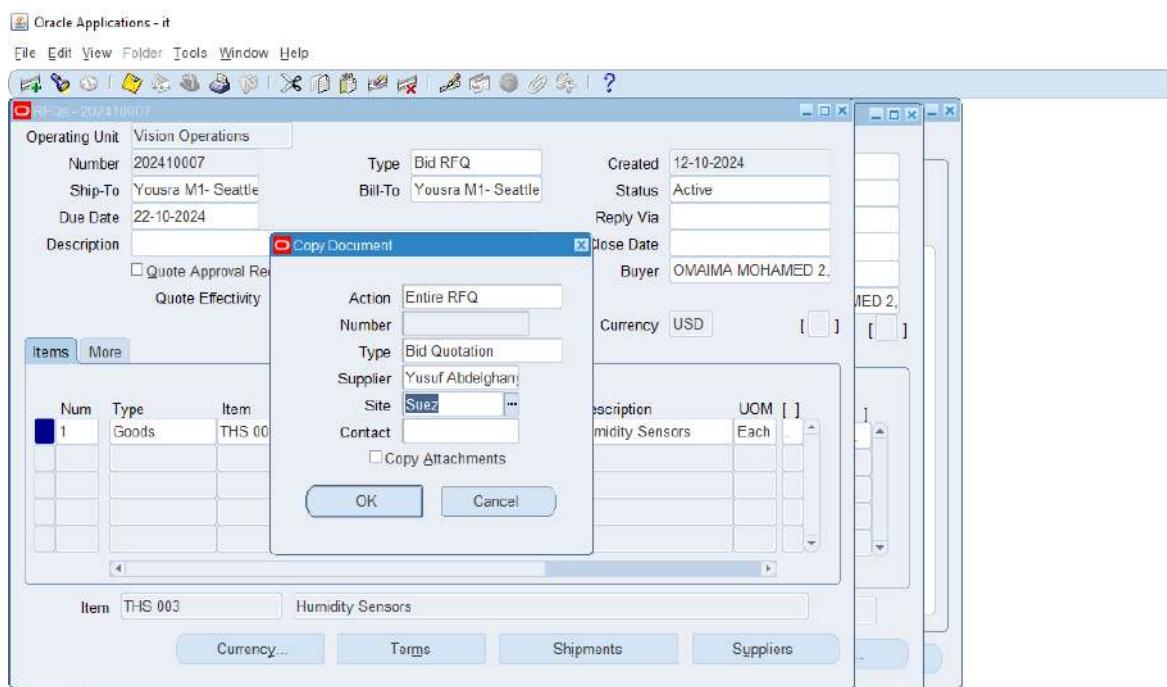


- Approve the entire quotation for the second supplier:  
Set the following Parameters:
  - Type: All Orders
  - Reason: Best Delivery



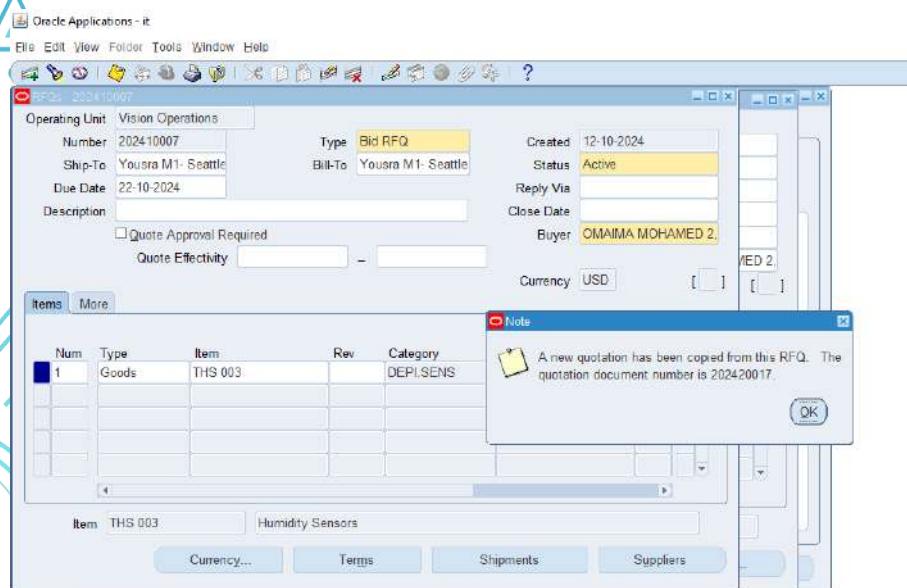
## D. Perform another "Copy Document":

- Navigate to "Copy Document" from the "Tools" menu.
- Set the parameters in the "Copy Document" window:
  - Action: Entire RFQ
  - Type: Bid Quotation
  - Supplier: Yusuf Abdelghany
  - Site: Suez
- Click "OK" to complete the process.
- This will successfully copy the entire RFQ and create a new bid quotation for **Yusuf Abdelghany at the Suez site.**



- Approval

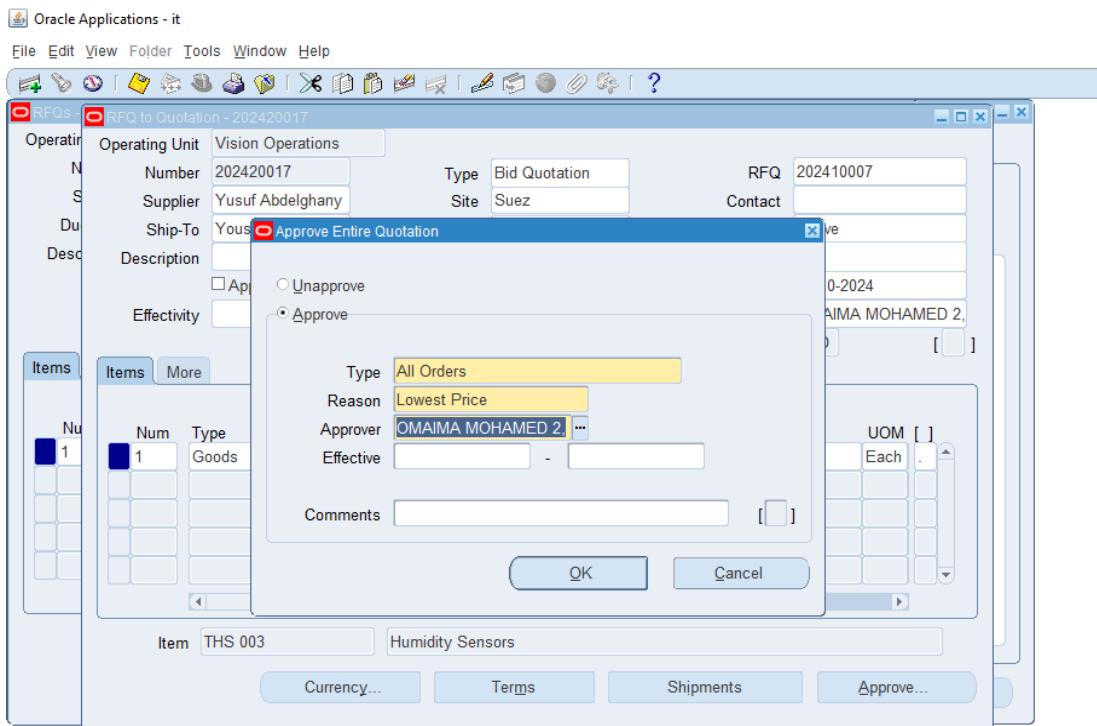
The new quotation for Yusuf Abdelghany has been successfully approved, indicating that it is now authorized and ready for the next steps in the procurement process.



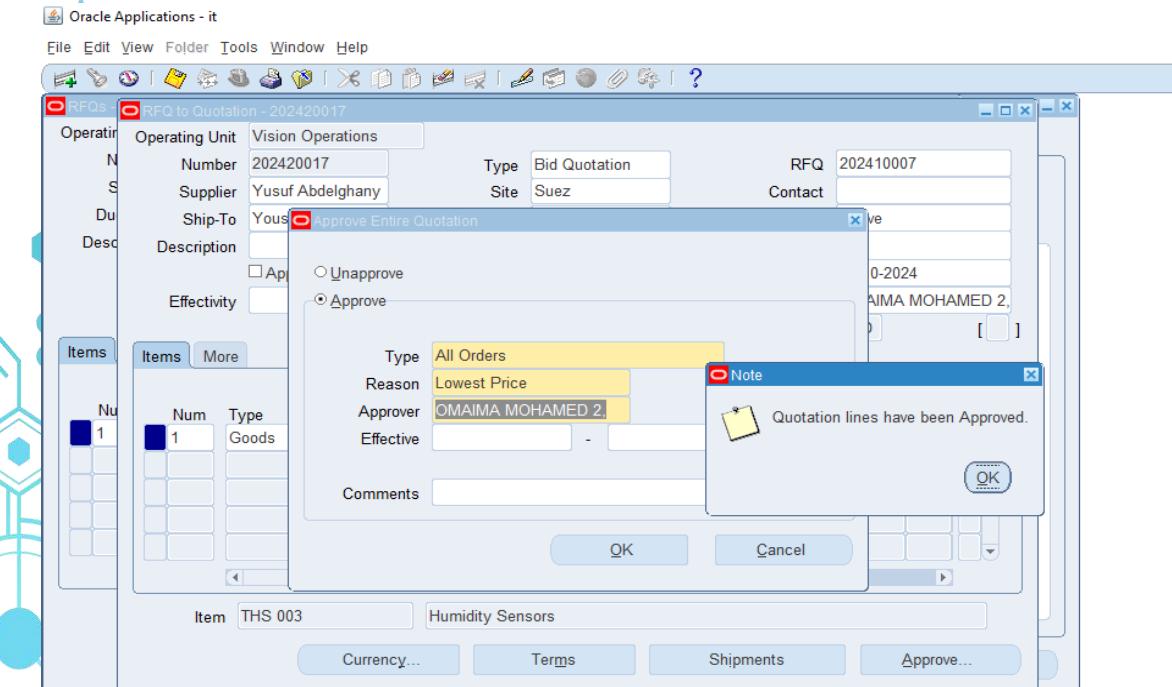
Approve the entire quotation for the second supplier, follow these steps:

- Navigate to the Quotation Approval Window using your procurement system.
- Set the Parameters:
  - Type: Select "All Orders".
  - Reason: Enter "Lowest Price" as the justification for the approval.
  - Click on the "Approve" button

This action will officially approve the quotation for the supplier, allowing the quotation to move forward in the procurement process.

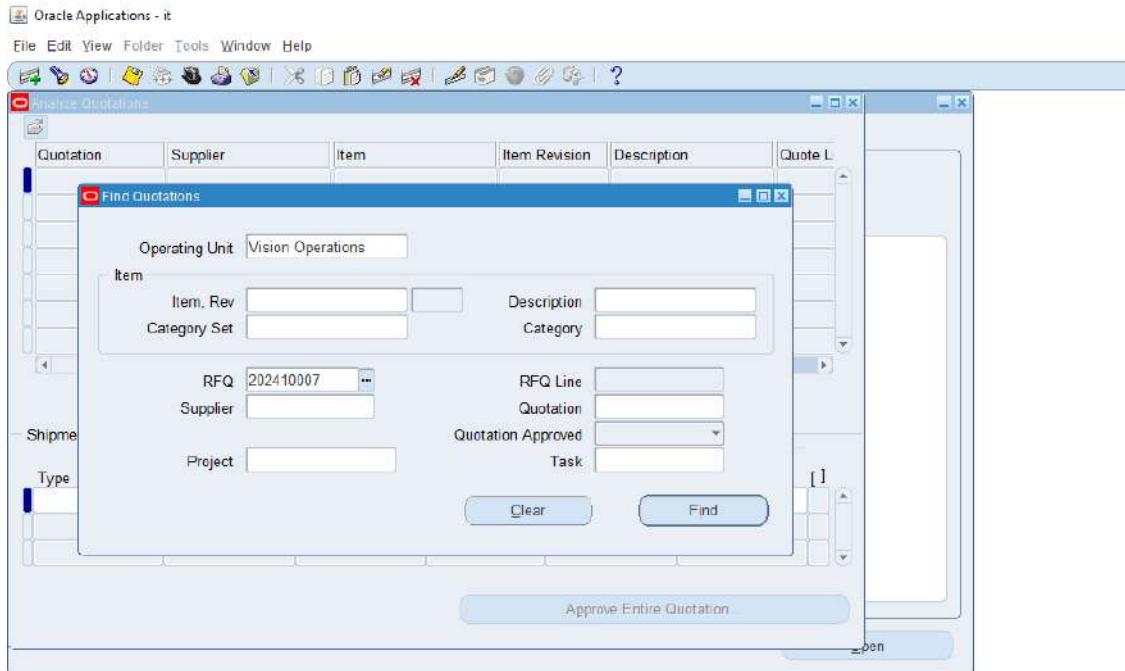


- Confirmation: The quotation lines have been successfully approved.

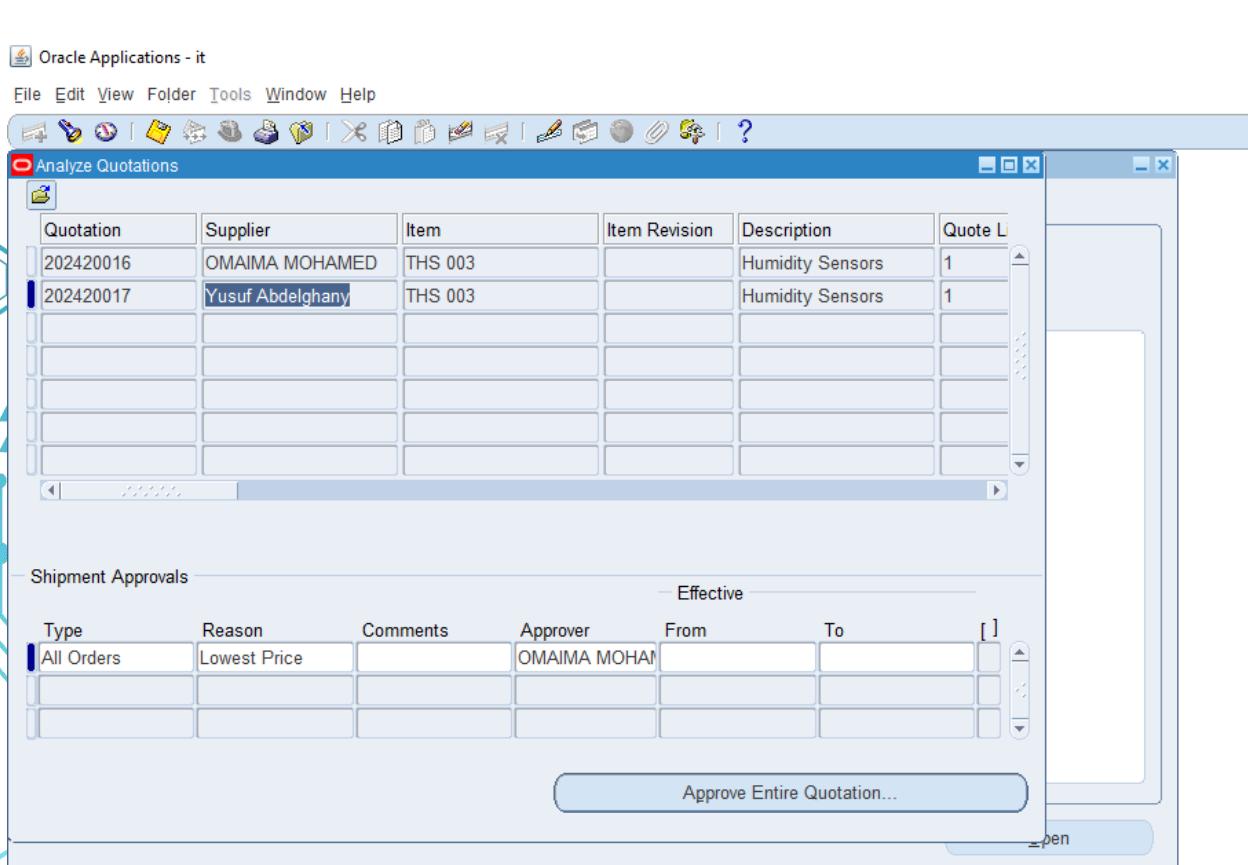


## Analyze the RFQ

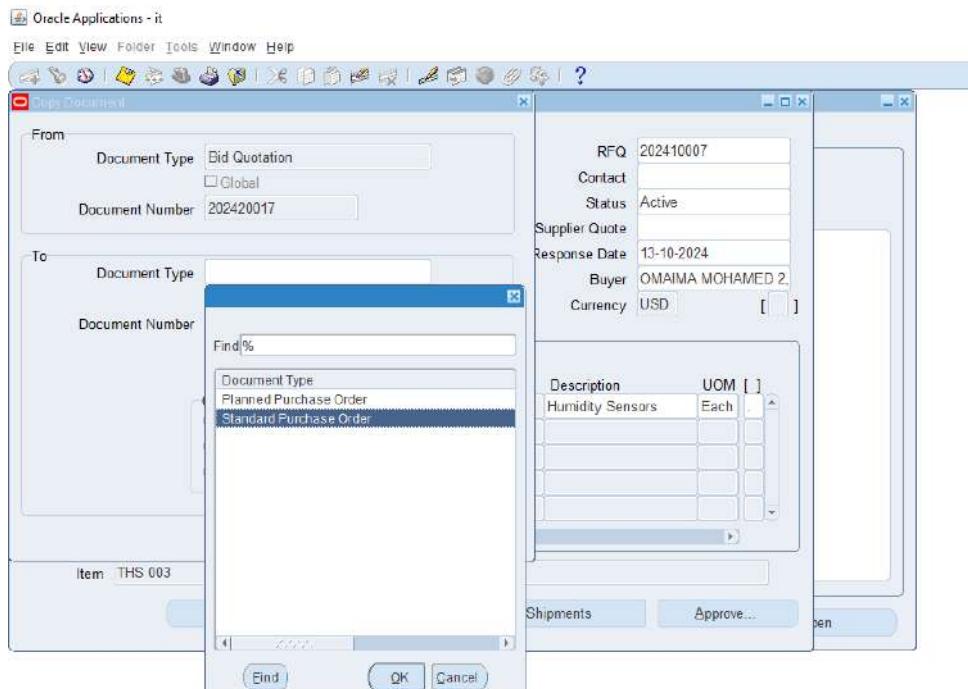
- Go to: RFQs and Quotations > Quote Analysis.
- In the RFQ field, input the relevant RFQ number.
- Click "Find":



- approve the entire quotation.

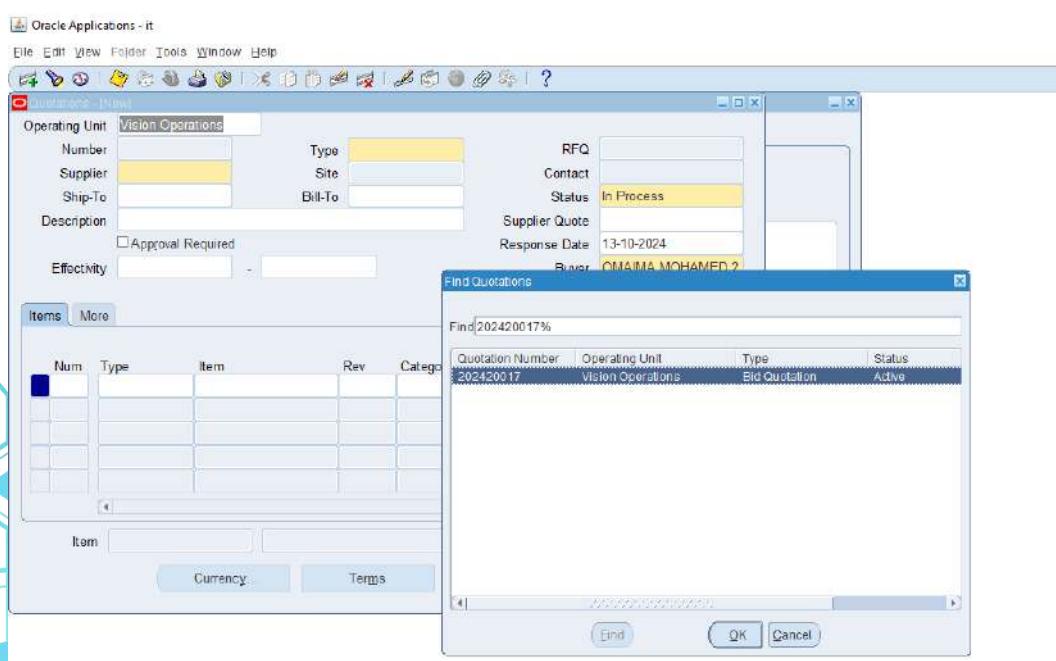


- Go to Purchasing Super User > RFQs and Quotations > Quotations.
- Enter Quotation Number
- Click "Find"



## E. Copy a Standard Purchase Order from a Bid Quotation:

- Go to Tools > Copy Document.
- Set the Parameters.
  - Choose Action: Standard Purchase Order.
  - Select Source Document Type: Bid Quotation.
- Click "OK"



**Copy Document**

**From**

- Document Type: Bid Quotation
- Global:
- Document Number: 202420017

**To**

- Document Type: Standard Purchase Order
- Global:
- Document Number:
- Copy Attachments
- Copy Blanket Price to RFQ
- Contract Terms**

  - Copy Latest Clauses from Library
  - Copy Current Clauses from Document
  - Do Not Copy Contract Terms

**RFQ** 20241007  
**Contact**:  
**Status**: Active  
**Supplier Quote**:  
**Response Date**: 13-10-2024  
**Buyer**: OMAIMA MOHAMED 2.  
**Currency**: USD [ ]

Description	UOM
Humidity Sensors	Each

**Item** THS 003      **Humidity Sensors**

**Currency...**    **Terms...**    **Shipments...**    **Approve...**

- The purchase order has been created.

**Copy Document**

**From**

- Document Type: Bid Quotation
- Global:
- Document Number: 202420017

**To**

- Document Type: Standard Purchase Order
- Global:
- Document Number:
- Copy Attachments
- Copy Blanket Price to RFQ
- Contract Terms**

  - Copy Latest Clauses from Library
  - Copy Current Clauses from Document
  - Do Not Copy Contract Terms

**RFQ** 20241007  
**Contact**:  
**Status**: Active  
**Supplier Quote**:  
**Response Date**: 13-10-2024  
**Buyer**: OMAIMA MOHAMED 2.  
**Currency**: USD [ ]

**Note**: APP-PO-1555: Purchase order 202440051 has been created.

**OK**    **Cancel**

**Item** THS 003      **Humidity Sensors**

**Currency...**    **Terms...**    **Shipments...**    **Approve...**

- Approve the purchase order.

**Copy Documents to Purchase Orders - 202440051**

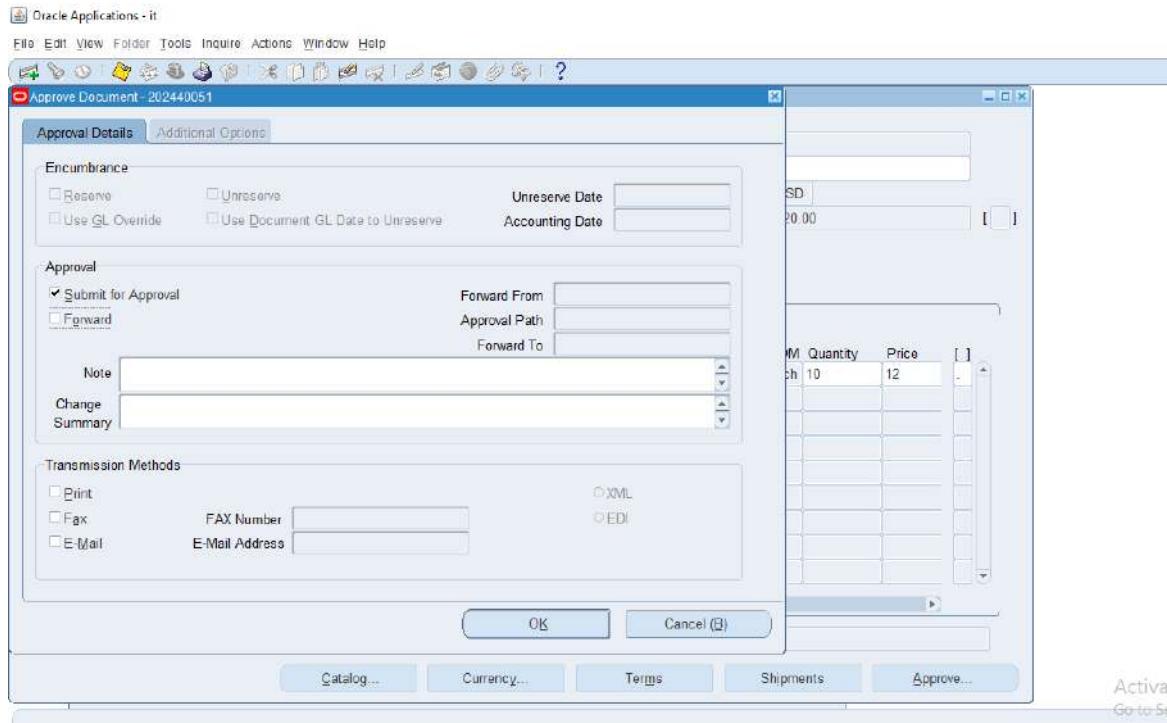
Operating Unit	Vision Operations	Created	13-10-2024 13:47:18
PO_Rev	202440051	Type	Standard Purchase Order
Supplier	Yusuf Abdellahy	P-Card	<input type="text"/>
Ship-To	Youara M1- Seattle Mfg	Contact	<input type="text"/>
Buyer	OMAIMA MOHAMED 2.	Currency	USD [ ]
Description	Status: Incomplete Total: 120.00		

**Lines**    **Price Reference**    **Reference Documents**    **More**    **Agreement**    **Temporary Labor**

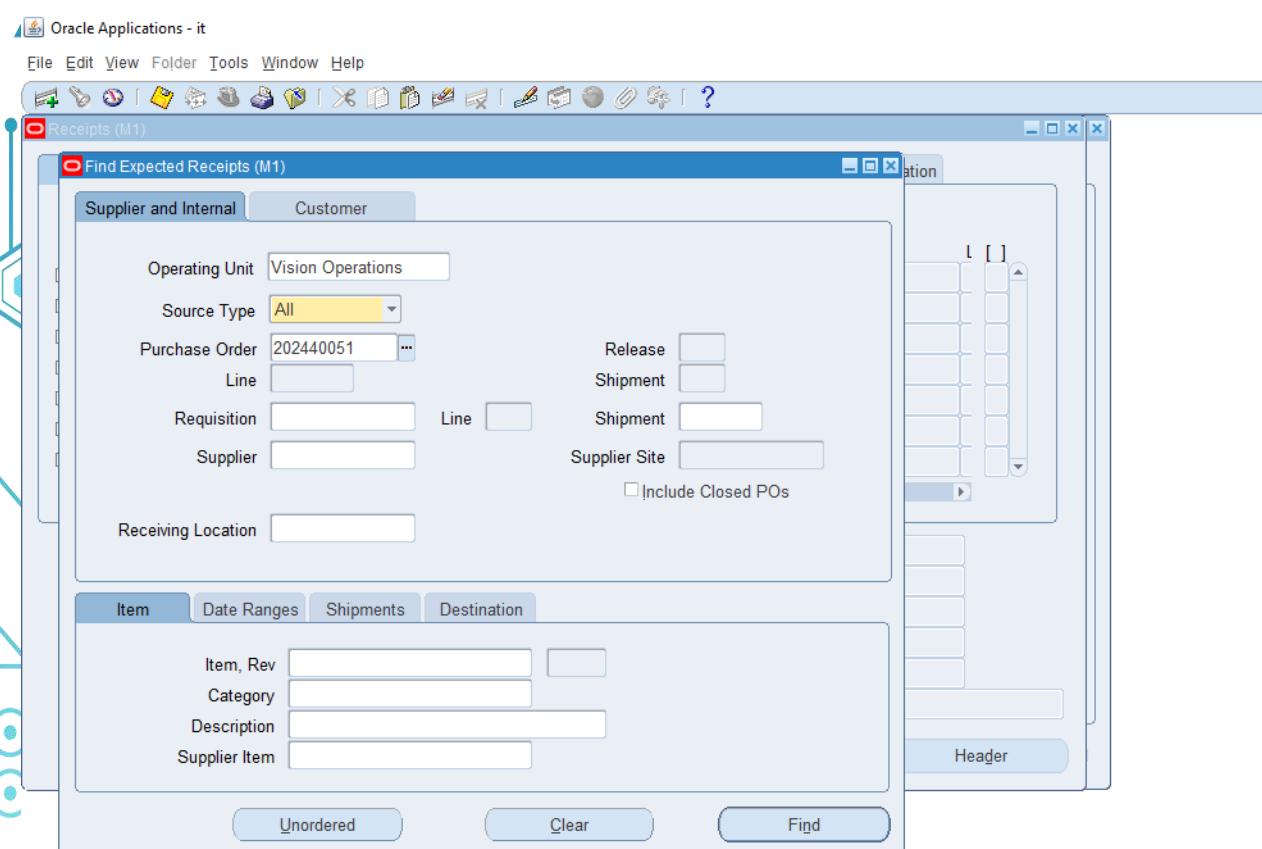
Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price
1	Goods	THS 003			DEPI SENS	Humidity Sensors	Each	10	12

**Item** THS 003      **Humidity Sensors**

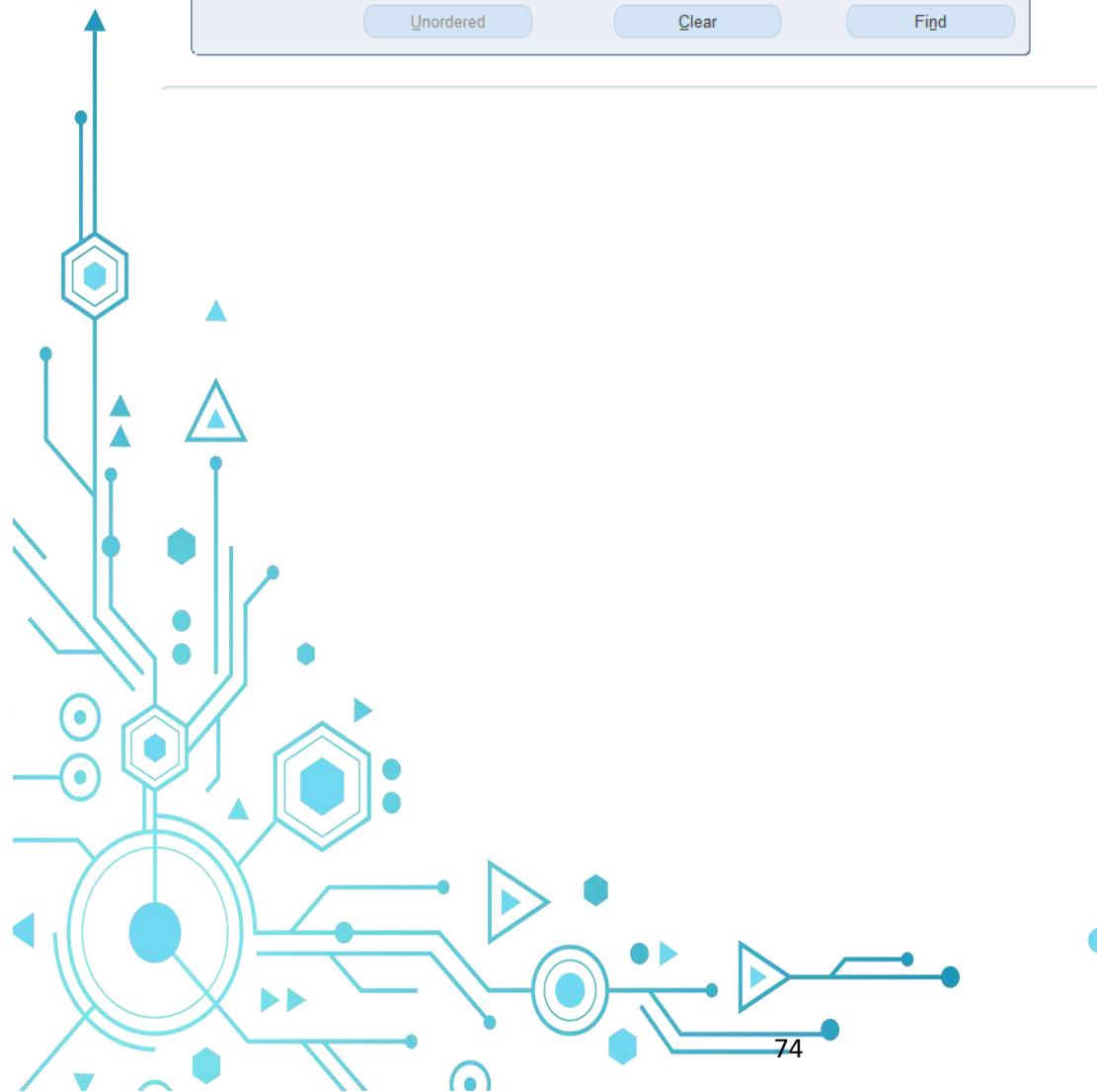
**Catalog...**    **Currency...**    **Terms...**    **Shipments...**    **Approve...**



- Search for receipts using the purchase order number.
- Select Receiving from the menu.
- Click on Receipts.
- In the search field, enter the purchase order number you want to find.
- Click on Find



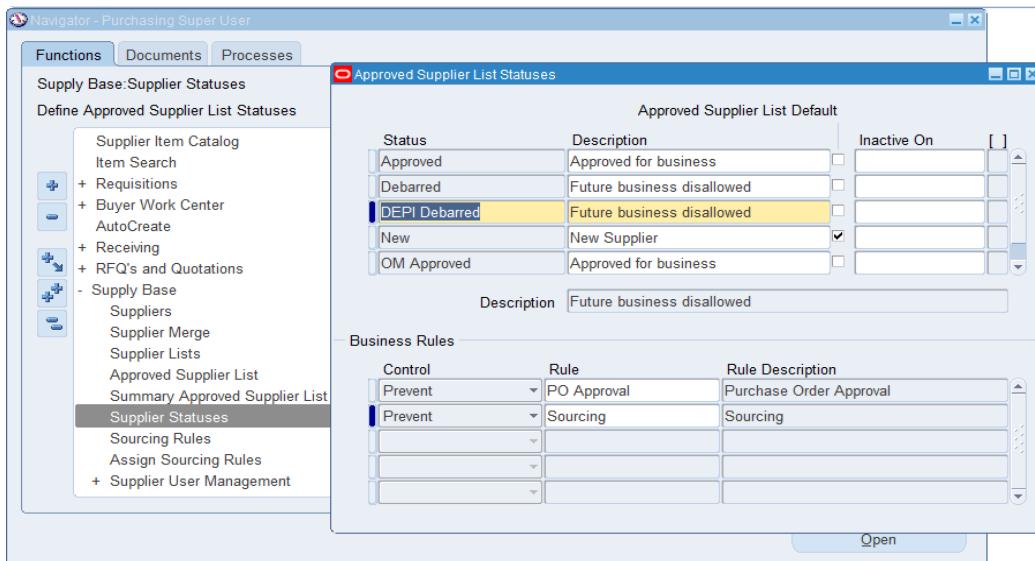
- Select the line and choose the sub-inventory.
  - Click on the line to select it.
  - Choose the sub-inventory.
  - Click on Save to confirm the changes.



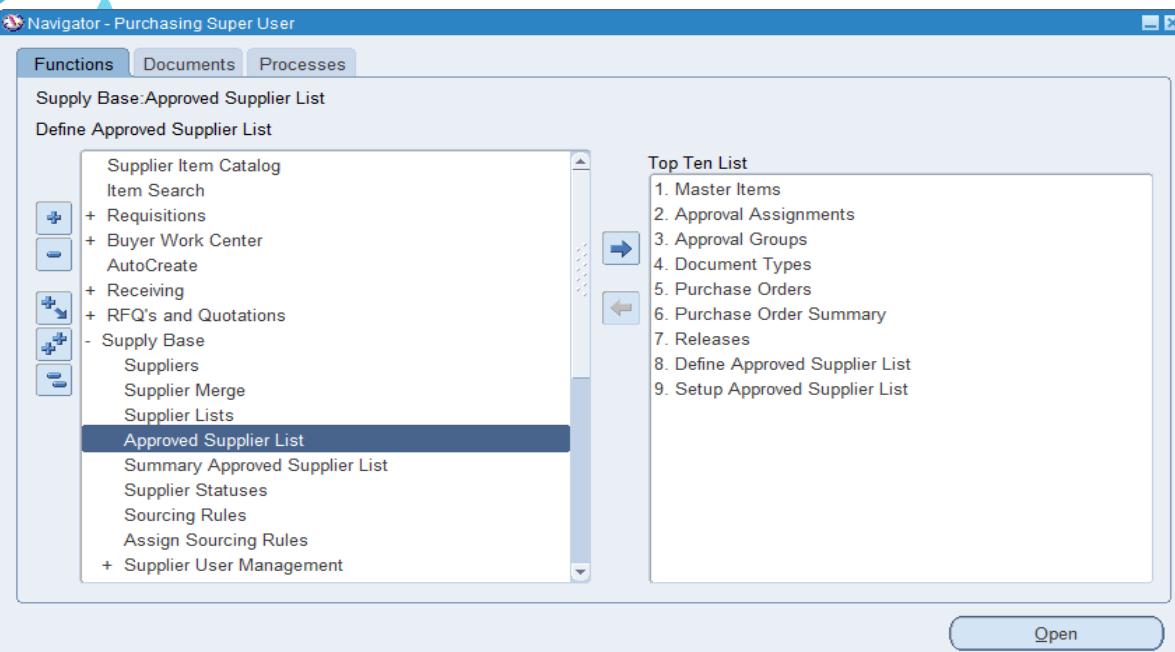
## 17. Supplier Status

### Step 1:

- Navigate to -> Supply Base -> Supplier Statuses.
- Click on Create or New to initiate a new supplier status entry.
- Enter Supplier Status Details:
  - Supplier Status Name: Enter DEPI Debarred.
- Define Business Rules:
  - Business Rule 1: Set to (Prevent) PO Approval.
  - Business Rule 2: Set to (Prevent) Sourcing.
- Save the Status.



- Navigate to the Approved Supplier List.
- In the navigation menu, select Supply Base.
- From the Supply Base options, click on Approved Supplier List



## Step2:

### Item Selection

- Enter Item Details:
  - Item Name: PIR 005
  - Description: Motion Sensors
- Key Attributes:
  - Business: Direct
  - Supplier: Omaima Mohamed
- Site: Cairo
  - Operating Unit: Vision Operations
  - Status: DEPI Debarred
- Click on Save

**Approved Supplier List (M1)**

Type	Commodity	Item	Description
Item		PIR 005	Motion Sensors

**Suppliers**

Key Attributes   Record Details   Comments

Business	Supplier	Site	Operating Unit	Status	Disabled	Supplier Item	Manufacturer
Direct	OMAIMA MOHAME	CAIRO	Vision Operations	DEPI Debar	<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		

Attributes

## Step3:

- Navigate to Purchase Orders:
- Go to Purchase Orders Super User.
- Select Purchase Orders.

**Navigator - Purchasing Super User**

Functions   Documents   Processes

Purchase Orders.Purchase Orders

Purchase Orders

- + Reports
  - Change Organization
- + Setup
  - Requests
- + Workflow User
  - Advanced Pricing
  - Notifications Summary
- + View Purchasing Documents
  - Funds Available
- Purchase Orders
  - Purchase Order Summary
  - Purchase Orders**
  - Releases
  - PO Change History
  - Pending Purchase Order Changes
  - Manage Deliverables
  - Exceeded Price Tolerances

Top Ten List

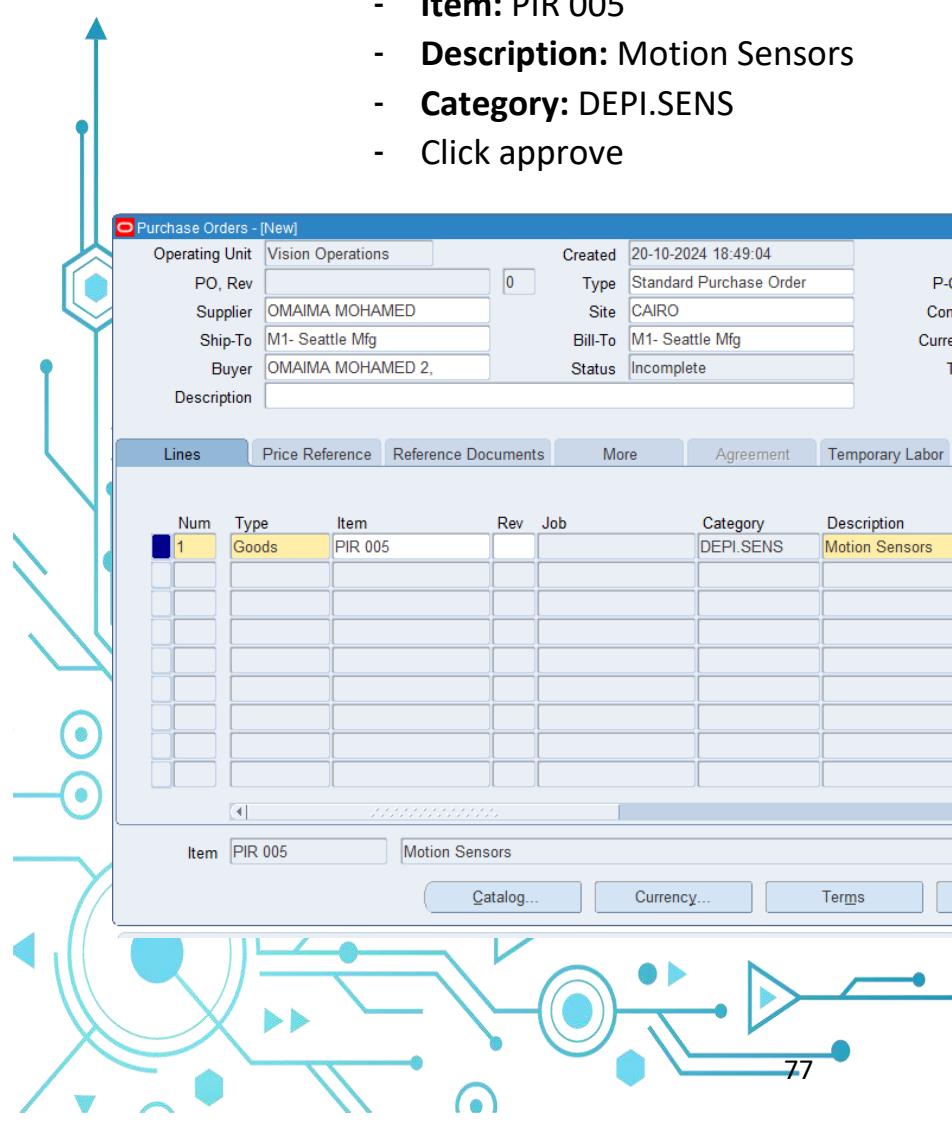
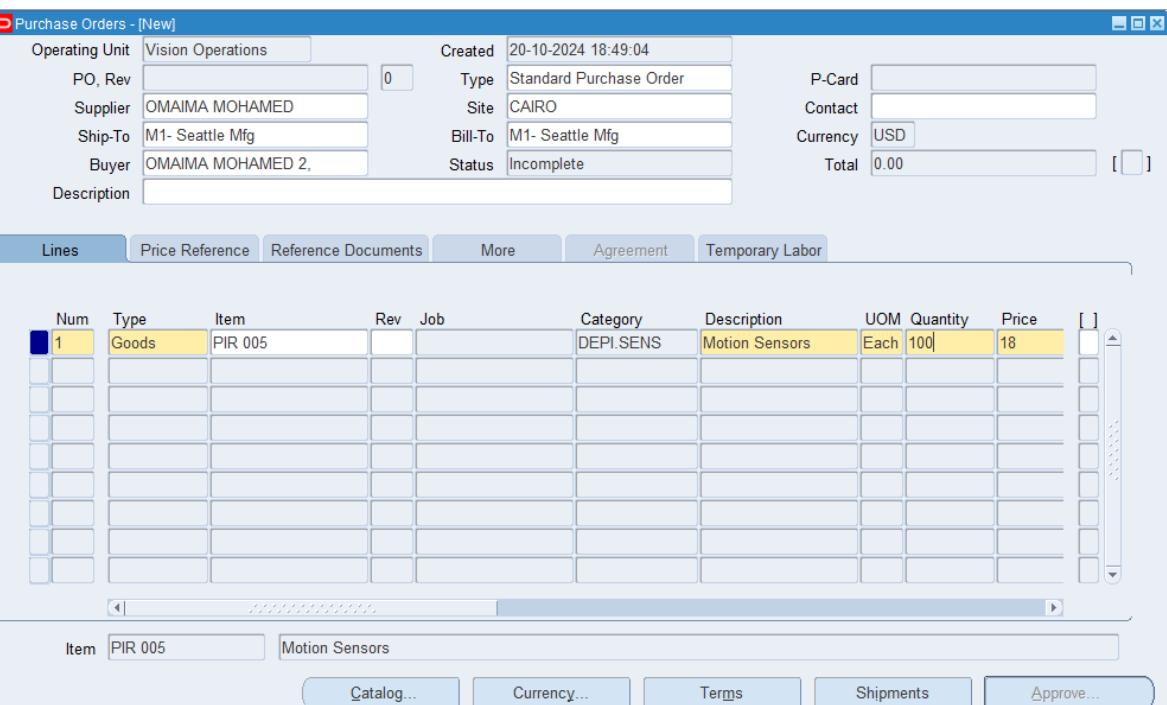
1. Master Items
2. Approval Assignments
3. Approval Groups
4. Document Types
5. Purchase Orders
6. Purchase Order Summary
7. Releases
8. Define Approved Supplier List
9. Setup Approved Supplier List

Open

- Enter Supplier Information:
    - **Supplier:** Omaima Mohamed
    - **Site:** Cairo
    - **Type:** Standard Purchase Order
    - Click **Save**



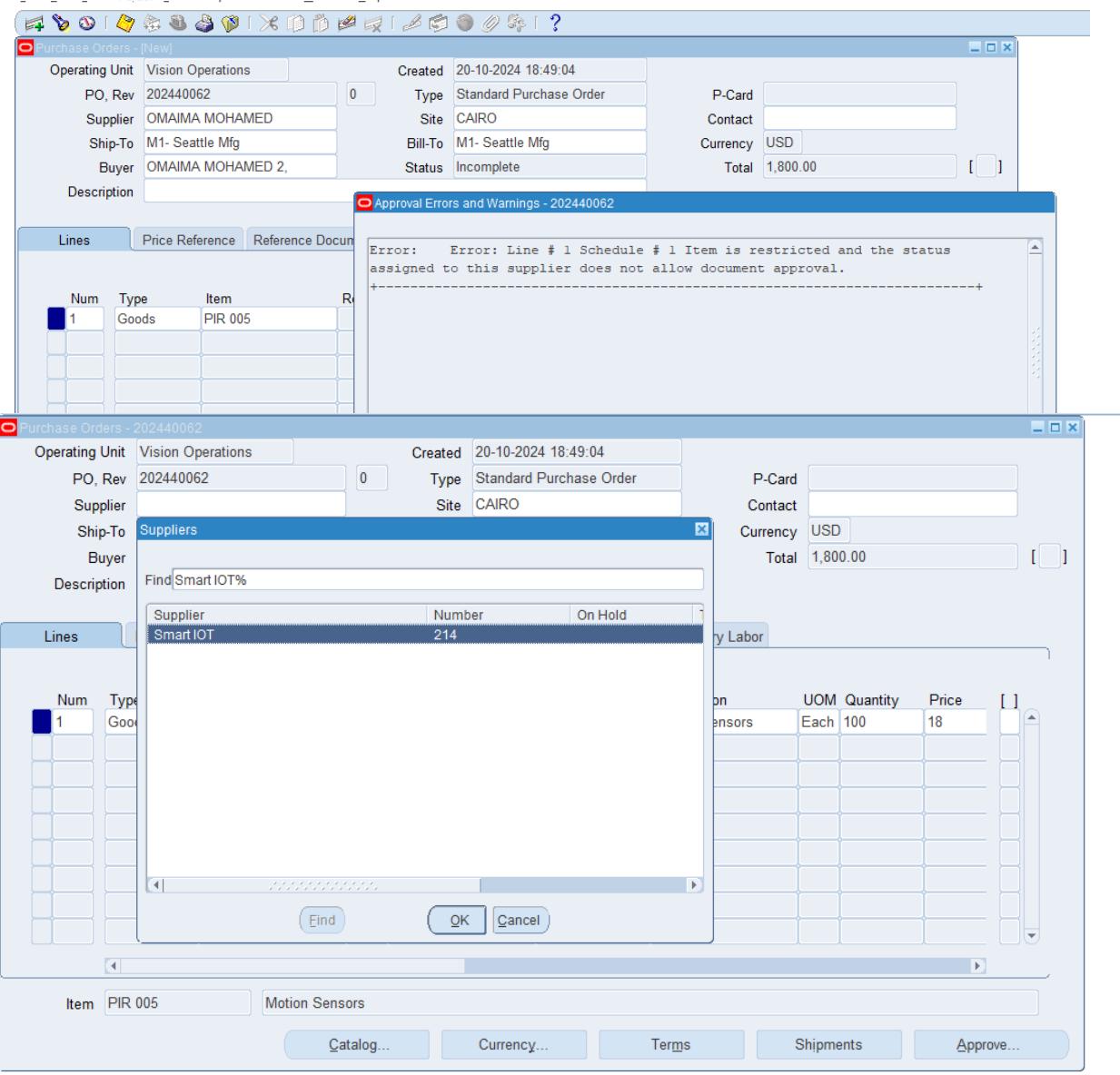
- Enter Item Details:
    - **Item:** PIR 005
    - **Description:** Motion Sensors
    - **Category:** DEPI.SENS
    - Click approve



- Approval Message:

This purchase order cannot be approved because this supplier is prevented from approving purchase orders or sourcing.

- Operating Unit is set to Vision Operations and the Ship-To location is M1-Seattle Mfg



The screenshot shows two overlapping SAP windows. The top window is titled "Purchase Orders - (New)" and displays the following details:

Operating Unit	Vision Operations
PO, Rev	202440062
Supplier	OMAIMA MOHAMED
Ship-To	M1- Seattle Mfg
Buyer	OMAIMA MOHAMED 2,
Description	

Created: 20-10-2024 18:49:04      Type: Standard Purchase Order      Site: CAIRO      Bill-To: M1- Seattle Mfg      Status: Incomplete

P-Card: [ ]      Contact: [ ]      Currency: USD      Total: 1,800.00 [ ]

The "Lines" tab is selected, showing one line item:

Num	Type	Item
1	Goods	PIR 005

A modal dialog titled "Approval Errors and Warnings - 202440062" contains the message: "Error: Error: Line # 1 Schedule # 1 Item is restricted and the status assigned to this supplier does not allow document approval."

The bottom window is titled "Purchase Orders - 202440062" and shows the same header information. The "Supplier" field is open, displaying a list of suppliers:

Supplier	Number	On Hold
Smart IOT	214	

The "Lines" tab is selected, showing the same one-line item as the top window.

#### Step4:

##### Next Step Choosing Smart IOT

- Update Purchase Order:
  - Update the supplier information to **Smart IOT**.

##### Verify Item Details:

- Ensure that the item details remain the same:

Item Name: PIR 005

Description: Motion Sensors

Category: DEPI.SENS

- Approve Purchase Order:
  - **Supplier:** Smart IOT
  - **Site:** Cairo
  - **Type:** Standard Purchase Order
  - **Ship-To:** Egypt
  - **Bill-To:** M1-Seattle Mfg.

**Purchase Orders - 202440062**

Operating Unit	Vision Operations	Created	20-10-2024 18:49:04
PO, Rev	202440062	Type	Standard Purchase Order
Supplier	Smart IOT	Site	Cairo
Ship-To	egypt	Bill-To	M1- Seattle Mfg
Buyer	OMAIMA MOHAMED 2,	Status	Incomplete
Description			

Lines    Price Reference    Reference Documents    More    Agreement    Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price
1	Goods	PIR 005			DEPI.SENS	Motion Sensors	Each	100	18
< >									

Item PIR 005 Motion Sensors

Catalog...    Currency...    Terms    Shipments    Approve...

- Approve the Purchase Order.

**Approve Document - 202440062**

<b>Approval Details</b>		<b>Additional Options</b>
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 _____ Accounting Date _____		
Approval <input checked="" type="checkbox"/> Submit for Approval    Forward From _____ <input type="checkbox"/> Forward    Approval Path _____ Forward To _____ Note _____ Change Summary _____		
Transmission Methods <input type="checkbox"/> Print    XML <input type="checkbox"/> FAX    EDI <input type="checkbox"/> E-Mail    FAX Number _____ E-Mail Address _____		

OK    Cancel (B)

Catalog...    Currency...    Terms    Shipments    Approve...

- Purchase order status has changed to Approved

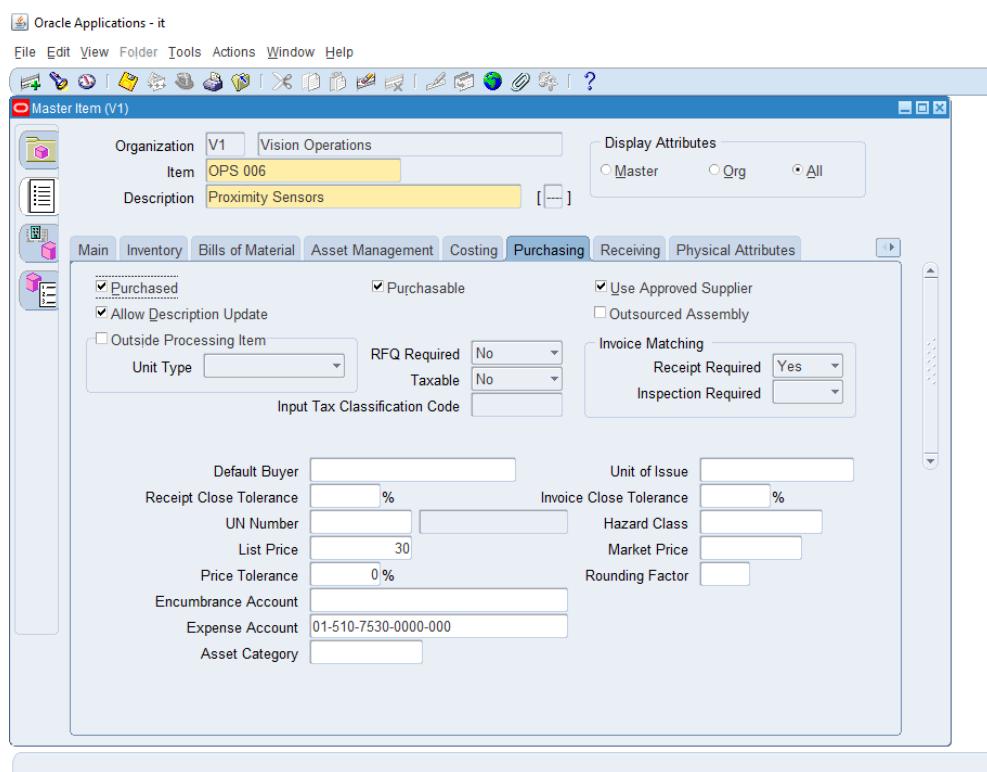


# Sense the Future

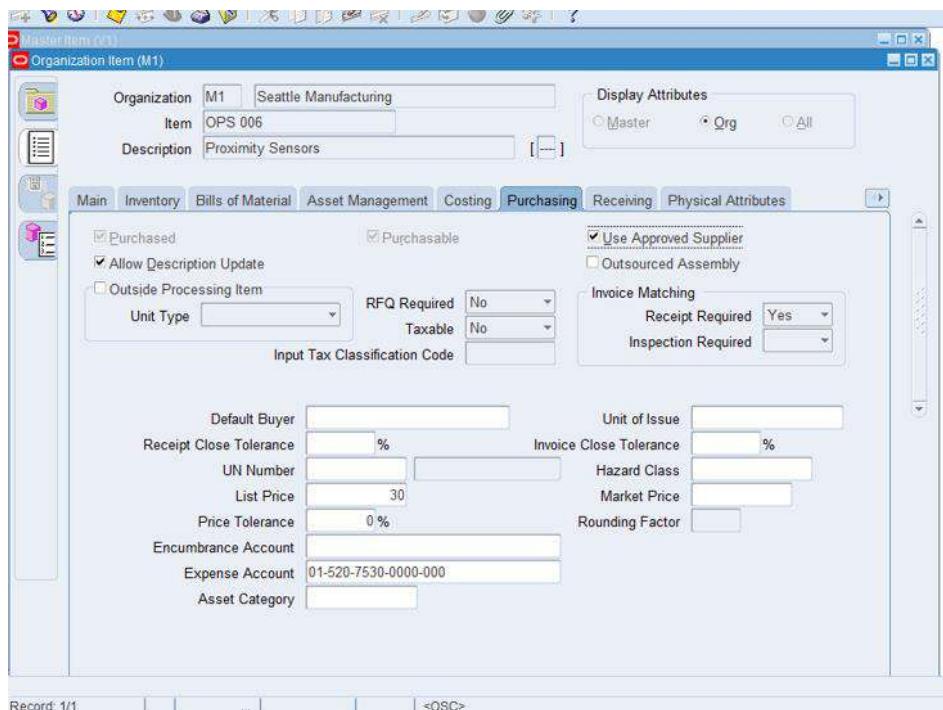
## 18. Approved Supplier

### Step1:

- Navigate to Items -> Organization Items.
- Select the organization: V1.
- Enter the item: OPS 006.
- Set the Approved Supplier Flag.
- Find the Approved Supplier section for the item.
- Add or select the approved supplier (if applicable).
- Ensure the approved supplier flag is checked or set to Yes.
- Click Save



- In the Organization Items Window
- Click Find to search for the item.
- Select Purchasing:
- Check the Use Approved Supplier Box.
- Save Changes.



Organization M1 Seattle Manufacturing  
Item OPS 006  
Description Proximity Sensors

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

Purchased Allow Description Update Outside Processing Item Unit Type RFQ Required No Taxable No Input Tax Classification Code

Use Approved Supplier Outsourced Assembly Invoice Matching Receipt Required Yes Inspection Required

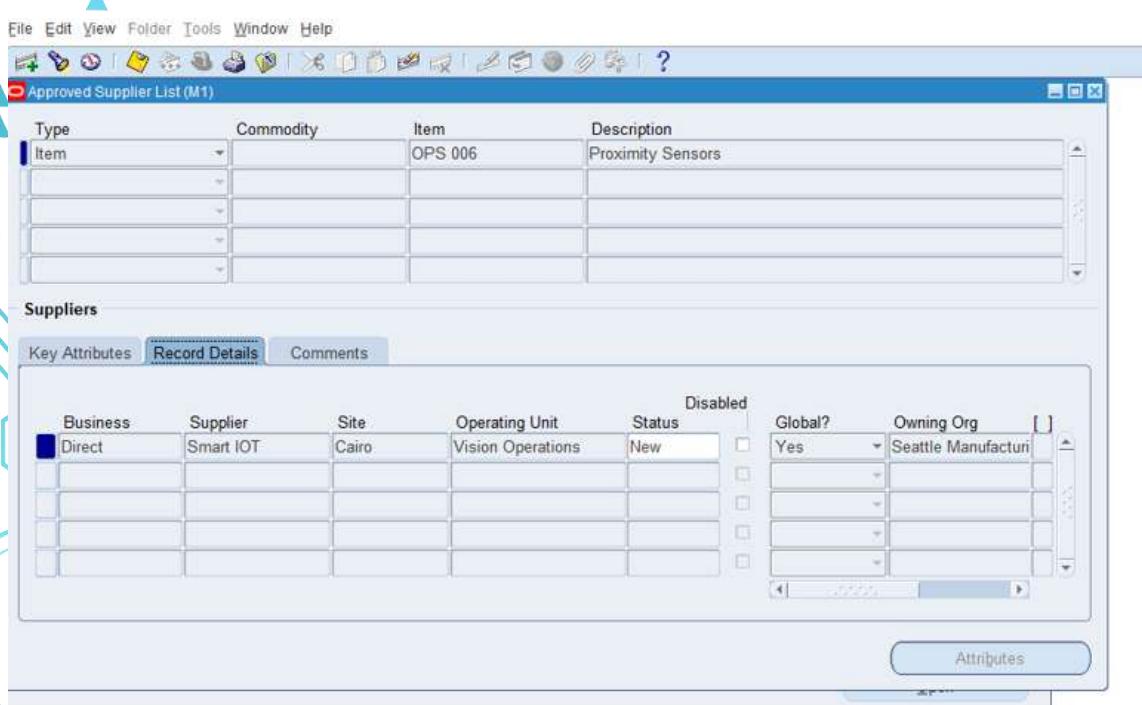
Default Buyer Receipt Close Tolerance % UN Number List Price 30 Price Tolerance 0 % Encumbrance Account Expense Account 01-520-7530-0000-000 Asset Category

Unit of Issue Invoice Close Tolerance % Hazard Class Market Price Rounding Factor

Record: 1/1 <OSC>

## Step2:

- Adding an Approved Supplier for our Item
- Navigate to Supply Base -> Approved Supplier List.
- Enter the Following Details:
  - Type: Item
  - Item: OPS 006
  - Business: Direct
  - Supplier: Smart IOT
  - Site: Cairo
  - Operating Unit: Vision Operations
  - Status: New
  - Global: Yes
- Click Save



File Edit View Folder Tools Window Help

Approved Supplier List (M1)

Type	Commodity	Item	Description
Item		OPS 006	Proximity Sensors

Suppliers

Key Attributes Record Details Comments

Business	Supplier	Site	Operating Unit	Status	Disabled	Global?	Owning Org
Direct	Smart IOT	Cairo	Vision Operations	New	<input type="checkbox"/>	Yes	Seattle Manufactur

Attributes

### Step3:

#### Creating and Approving a Standard Purchase Order

- Navigate to Purchase Orders -> Purchase Orders.
- Enter the Header Information:
  - Supplier: Smart IOT
  - Type: Standard Purchase Order
  - Site: Cairo
  - Ship-To: Egypt
  - Bill-To: M1-Seattle Mfg
- Status: Incomplete
- Enter the Line Information:
  - Item: OPS 006
  - Description: Proximity Sensors
  - Quantity: 100
- Click Approve

File Edit View Folder Tools Inquire Actions Window Help

 Purchase Orders - [New]

Operating Unit	Vision Operations	Created	11-10-2024 19:20:39
PO, Rev	202440041	Type	Standard Purchase Order
Supplier	Smart IOT	Site	Cairo
Ship-To	egypt	Bill-To	M1-Seattle Mfg
Buyer	OMAIMA MOHAMED 2,	Status	Incomplete
Description			

P-Card:   
 Contact:   
 Currency: USD   
 Total: 3,000.00

Lines Price Reference Reference Documents More Agreement Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price
1	Goods	OPS 006			DEPI.SENS	Proximity Sensors	Each	100	30

Item: OPS 006 Proximity Sensors

Catalog... Currency... Terms Shipments Approve...

FRM-40400: Transaction complete: 4 records applied and saved.  
 Record: 1/1 <OSC>

- Approving the Purchase Order
- Click OK to confirm the approval.

**Approve Document - 202440041**

Approval Details		Additional Options	
<b>Encumbrance</b> <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"/>
<b>Approval</b> <input checked="" type="checkbox"/> Submit for Approval <input checked="" type="checkbox"/> Forward			
		Forward From	OMAIMA MOHAMED 2.
		Approval Path	<input type="text"/>
		Forward To	<input type="text"/>
Note: Change Summary			
<b>Transmission Methods</b> <input type="checkbox"/> Print <input type="radio"/> XML <input type="checkbox"/> Fax <input type="radio"/> EDI <input type="checkbox"/> E-Mail   FAX Number: <input type="text"/> E-Mail Address: <input type="text"/>			
<input type="button" value="OK"/> <input type="button" value="Cancel (B)"/>			
<input type="button" value="Catalog..."/> <input type="button" value="Currency..."/> <input type="button" value="Terms"/> <input type="button" value="Shipments"/> <input type="button" value="Approve..."/>			

- The status of the purchase order has been successfully updated to Approved.

**Purchase Orders - 202440041**

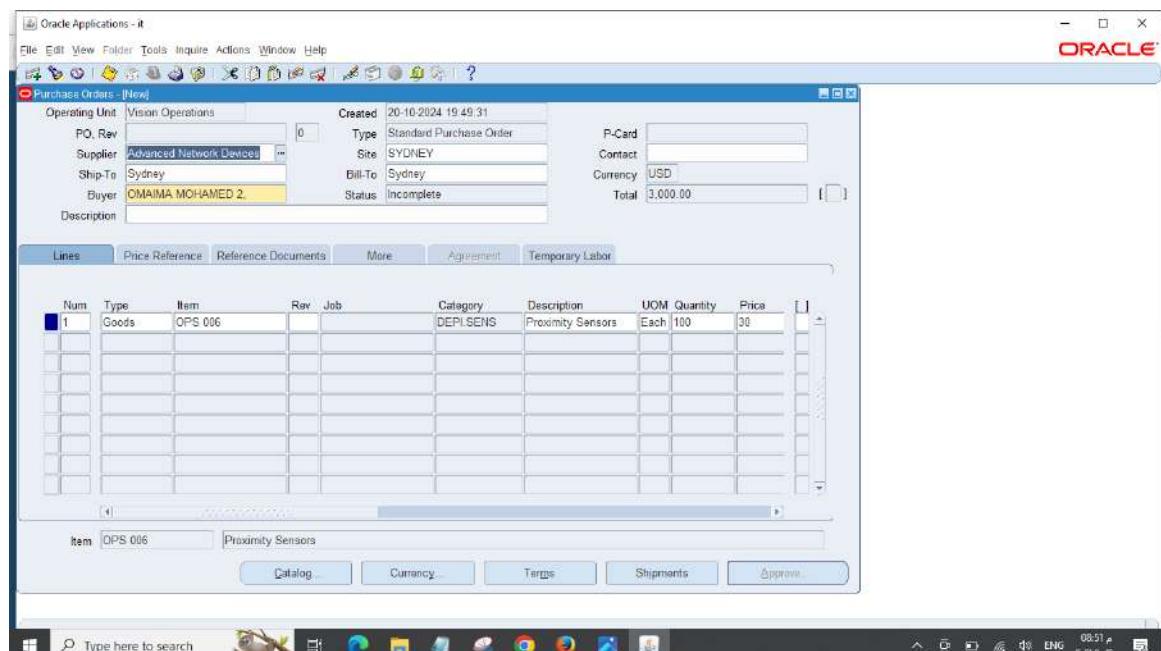
Operating Unit	Vision Operations	Created	11-10-2024 19:23:10																														
PO, Rev	202440041	Type	Standard Purchase Order																														
Supplier	Smart IOT	Site	Cairo																														
Ship-To	egypt	Bill-To	M1- Seattle Mfg																														
Buyer	OMAIMA MOHAMED 2.	Status	Approved																														
Description	<input type="text"/>																																
<input type="button" value="Lines"/> <input type="button" value="Price Reference"/> <input type="button" value="Reference Documents"/> <input type="button" value="More"/> <input type="button" value="Agreement"/> <input type="button" value="Temporary Labor"/>																																	
<table border="1"> <thead> <tr> <th>Num</th> <th>Type</th> <th>Item</th> <th>Rev</th> <th>Job</th> <th>Category</th> <th>Description</th> <th>UOM</th> <th>Quantity</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Goods</td> <td>OPS 006</td> <td></td> <td></td> <td>DEPI.SENS</td> <td>Proximity Sensors</td> <td>Each</td> <td>100</td> <td>30</td> </tr> <tr> <td colspan="10"><input type="text"/></td> </tr> </tbody> </table>				Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price	1	Goods	OPS 006			DEPI.SENS	Proximity Sensors	Each	100	30	<input type="text"/>									
Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price																								
1	Goods	OPS 006			DEPI.SENS	Proximity Sensors	Each	100	30																								
<input type="text"/>																																	
Item: OPS 006   Proximity Sensors <input type="button" value="Catalog..."/> <input type="button" value="Currency..."/> <input type="button" value="Terms"/> <input type="button" value="Shipments"/> <input type="button" value="Approve..."/>																																	

## Attempt to Approve Purchase Order with Unapproved Supplier



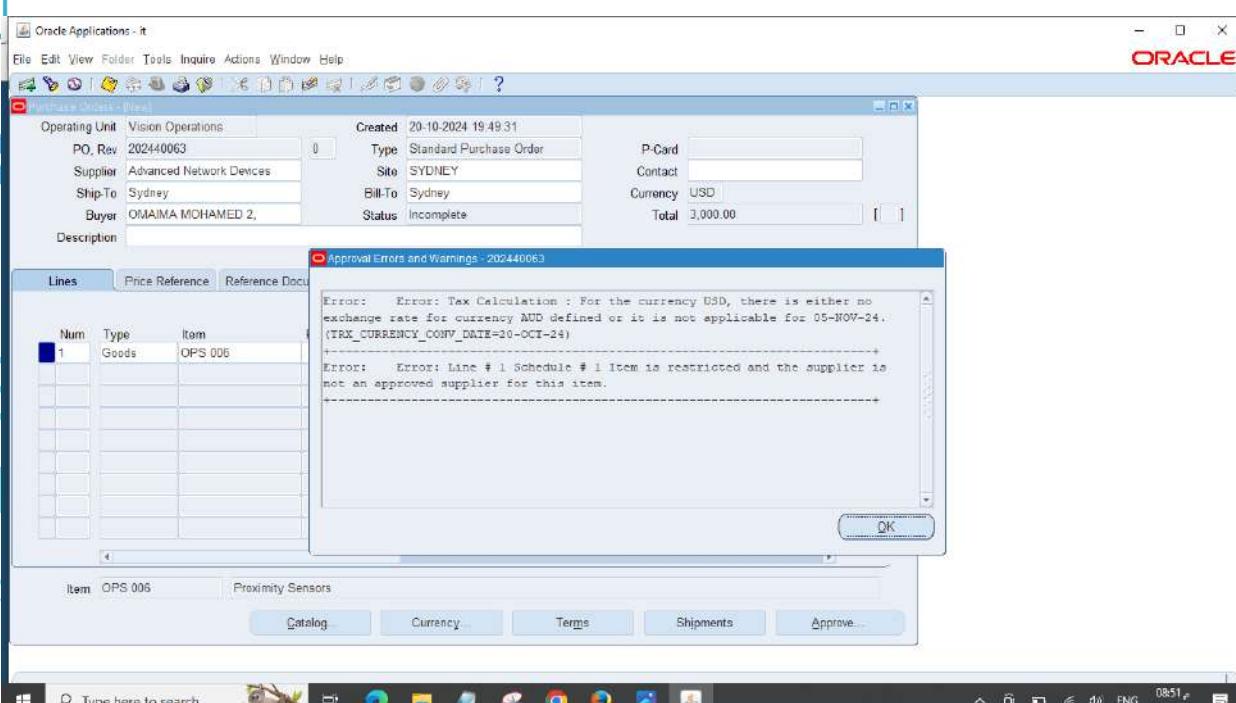
### Supplier: Advanced Network Devices

- Site: Sydney
- Ship-To: Sydney
- Bill-To: Sydney
- Line Information:
  - Item: OPS 006
  - Description: Proximity Sensors
  - Quantity: 100



### Error Message Details

- **Message:** This item is restricted, and this supplier is not an approved supplier for this item.



## 19. Blanket Purchase Agreement

### Step 1:

#### Defining Document Types for Blanket Purchase Agreement

- Navigate -> Setup -> Purchasing -> Document Types.
- Select Document Type: **Release Blanket**.
- Locate the document type for Release Blanket.
- Set Parameters:
  - **Forward Method:** Set to Hierarchy.
  - **Default Hierarchy:** Select DEPI Group Hierarchy 1.
  - **Owner Can Approve:** Ensure this option is Checked.
- Save Changes.

Update Document Type: Purchase Agreement Blanket for Vision Operations >

**Update Document Type: Release Blanket for Vision Operations**

\* Indicates required field

Approval		Control	
<input checked="" type="checkbox"/> Owner Can Approve <input checked="" type="checkbox"/> Approver Can Modify <input type="checkbox"/> Can Change Forward-To <input checked="" type="checkbox"/> Can Change Approval Hierarchy		Security Level: Public <input type="button" value="▼"/> Access Level: Full <input type="button" value="▼"/> Archive On: Approve <input type="button" value="▼"/>	
Approval Workflow	PO Approval <input type="button" value="▼"/>	Workflow Start Process	PO Approval Top Process <input type="button" value="▼"/>
Approval Transaction Type	Approval Transaction Type <input type="button" value="▼"/>	Forward Method	Hierarchy <input type="button" value="▼"/>
Default Hierarchy	DEPI Group Hierarchy1 <input type="button" value="▼"/>		

### Step 2:

#### Defining Document Types for Purchase Agreement Blanket

- Select Document Type: Purchase Agreement Blanket.
- Locate and select the document type for Purchase Agreement Blanket.
- Set Parameters:
  - **Forward Method:** Set to Hierarchy.
  - **Default Hierarchy:** Select DEPI Group Hierarchy 1.
  - **Owner Can Approve:** Ensure this option is Checked.
- Apply Changes:

Update Document Type: Purchase Agreement Blanket for Vision Operations

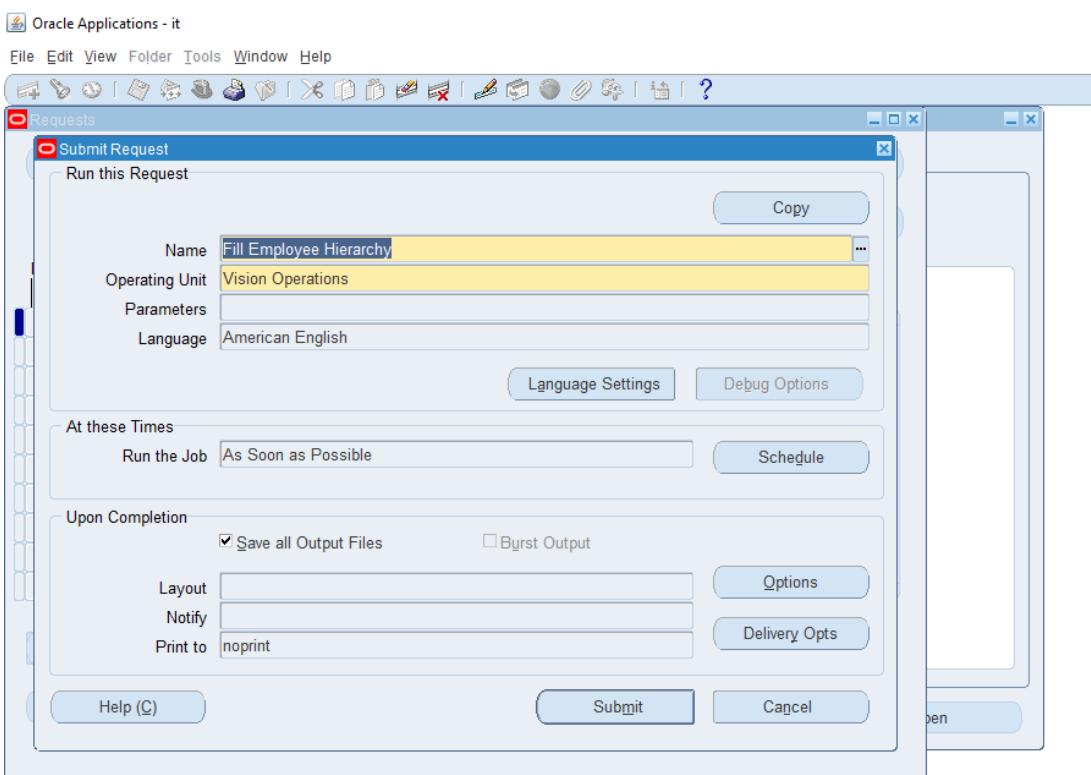
\* Indicates required field

Approval		Control	
<input checked="" type="checkbox"/> Owner Can Approve <input checked="" type="checkbox"/> Approver Can Modify <input checked="" type="checkbox"/> Can Change Forward-To <input checked="" type="checkbox"/> Can Change Approval Hierarchy		Security Level: Public <input type="button" value="▼"/> Access Level: Full <input type="button" value="▼"/> Archive On: Approve <input type="button" value="▼"/>	
Approval Workflow	PO Approval <input type="button" value="▼"/>	Workflow Start Process	PO Approval Top Process <input type="button" value="▼"/>
Approval Transaction Type	Approval Transaction Type <input type="button" value="▼"/>	Forward Method	Hierarchy <input type="button" value="▼"/>
Default Hierarchy	DEPI Group Hierarchy1 <input type="button" value="▼"/>		

### Step 3:

#### Submitting a New Request

- Navigate to View -> Requests.
- Select Submit a New Request.
- Enter Request Details:
  - Request Name: Fill Employee Hierarchy
  - Operating Unit: Vision Operations

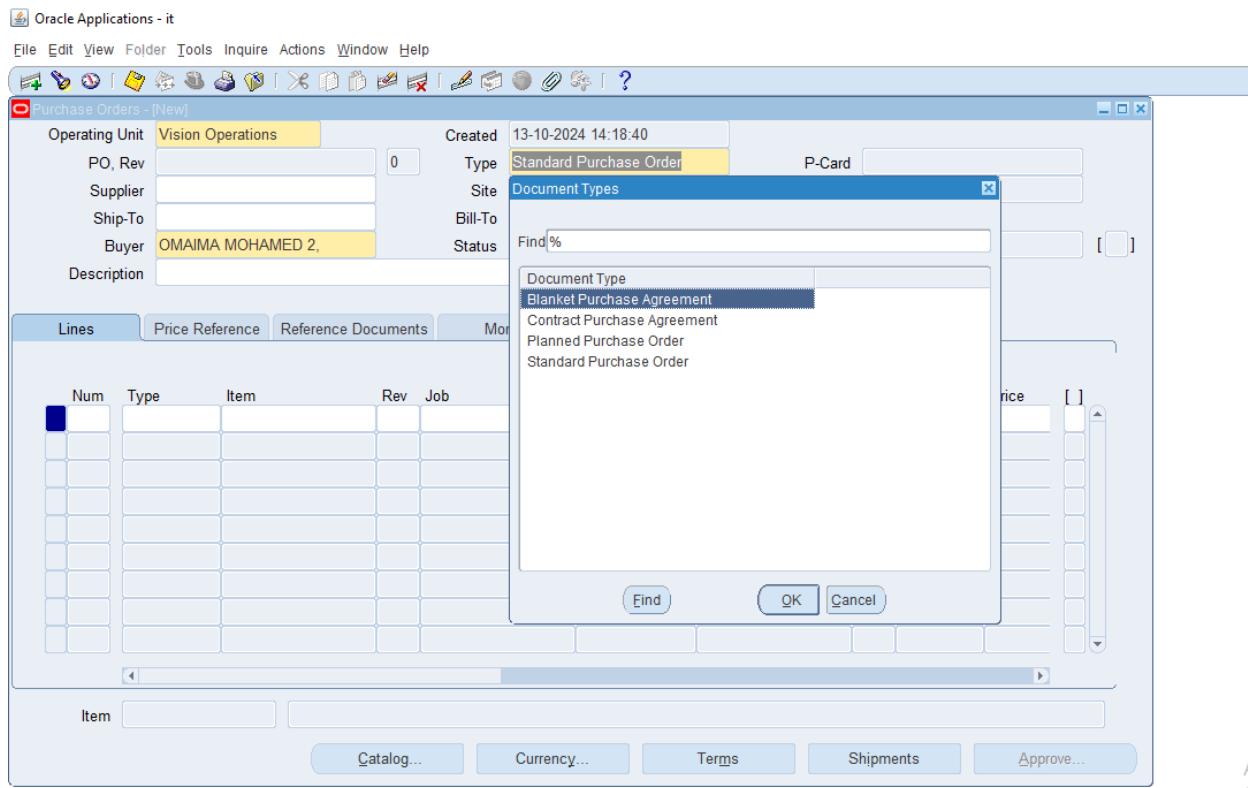


### Step 4:

#### Creating a Blanket Purchase Agreement

- Navigate to -> Purchase Orders > Purchase Orders.
- Enter Purchase Order Details
  - Operating Unit: Vision Operations
  - Type: Blanket Purchase Agreement
  - Supplier: Smart IOT
  - Site: Cairo
  - Ship-To: Egypt
  - Bill-To: M1-Seattle Mfg
  - Amount Agreed: \$10,000

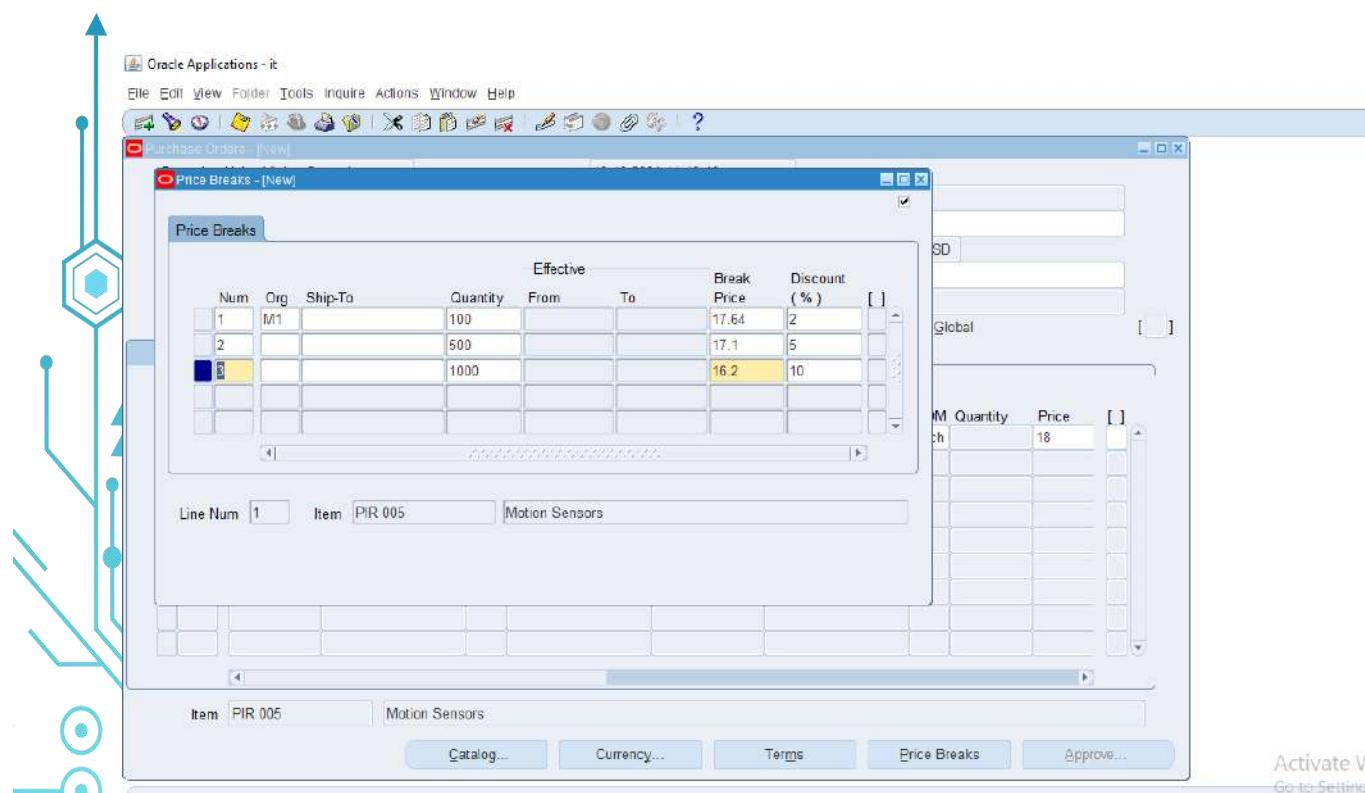
Click Save



## **Step 5:**

## Entering Price Break Details for Blanket Purchase Agreement

- Navigate to Price Breaks Section.
  - Enter Price Break Information.



- Approving the Blanket Purchase Agreement



Oracle Applications - it

File Edit View Folder Tools Inquire Actions Window Help

Approve Document - 202440052

**Approval Details** Additional Options

**Encumbrance**

Reserve       Unreserve      Unreserve Date   
 Use GL Override       Use Document GL Date to Unreserve      Accounting Date

**Approval**

Submit for Approval      Forward From   
 Forward      Approval Path   
 Note   
 Change Summary

**Transmission Methods**

Print      FAX Number        XML-  
 Fax      E-Mail Address        EDI  
 E-Mail

**Global** [ ]

Item	Quantity	Price	[ ]
1	10	18	[ ]
2	10	18	[ ]
3	10	18	[ ]
4	10	18	[ ]
5	10	18	[ ]
6	10	18	[ ]
7	10	18	[ ]
8	10	18	[ ]
9	10	18	[ ]
10	10	18	[ ]
11	10	18	[ ]
12	10	18	[ ]
13	10	18	[ ]
14	10	18	[ ]
15	10	18	[ ]
16	10	18	[ ]
17	10	18	[ ]
18	10	18	[ ]
19	10	18	[ ]
20	10	18	[ ]
21	10	18	[ ]
22	10	18	[ ]
23	10	18	[ ]
24	10	18	[ ]
25	10	18	[ ]
26	10	18	[ ]
27	10	18	[ ]
28	10	18	[ ]
29	10	18	[ ]
30	10	18	[ ]
31	10	18	[ ]
32	10	18	[ ]
33	10	18	[ ]
34	10	18	[ ]
35	10	18	[ ]
36	10	18	[ ]
37	10	18	[ ]
38	10	18	[ ]
39	10	18	[ ]
40	10	18	[ ]
41	10	18	[ ]
42	10	18	[ ]
43	10	18	[ ]
44	10	18	[ ]
45	10	18	[ ]
46	10	18	[ ]
47	10	18	[ ]
48	10	18	[ ]
49	10	18	[ ]
50	10	18	[ ]
51	10	18	[ ]
52	10	18	[ ]
53	10	18	[ ]
54	10	18	[ ]
55	10	18	[ ]
56	10	18	[ ]
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58	10	18	[ ]
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60	10	18	[ ]
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62	10	18	[ ]
63	10	18	[ ]
64	10	18	[ ]
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84	10	18	[ ]
85	10	18	[ ]
86	10	18	[ ]
87	10	18	[ ]
88	10	18	[ ]
89	10	18	[ ]
90	10	18	[ ]
91	10	18	[ ]
92	10	18	[ ]
93	10	18	[ ]
94	10	18	[ ]
95	10	18	[ ]
96	10	18	[ ]
97	10	18	[ ]
98	10	18	[ ]
99	10	18	[ ]
100	10	18	[ ]

OK Cancel (B)

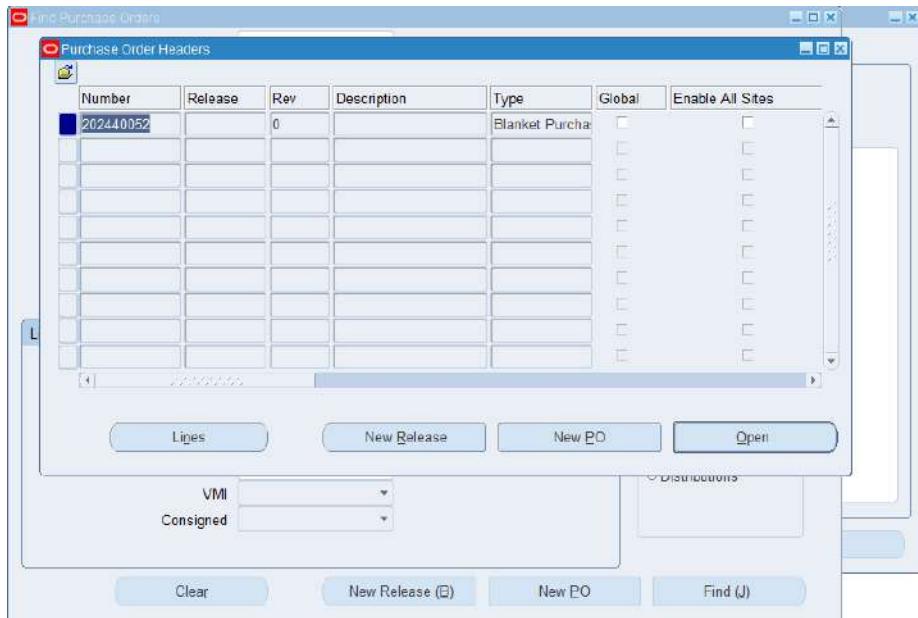
Catalog... Currency... Terms Price Breaks Approve... Activate



## Step 6:

### Searching for Purchase Order Summary

- Purchase Order Summary:
- Navigate to Purchase Orders -> Purchase Order Summary.
- In the search field, enter the Purchase Order Number: 202440052.
- Click Find



### Purchase Order Details

- PO Number: 202440052
- Supplier: Smart IOT
- Site: Cairo
- Release: 1
- Operating Unit: Vision Operations
- Status: **Incomplete**

Oracle Applications - it

File Edit View Folder Tools Actions Window Help

Purchase Order Summary to Releases - 202440052-1

Operating Unit	Vision Operations	Release	1	0	Created	13-10-2024 14:44:5
PO, Rev	202440052	Site	Cairo		Contact	
Supplier	Smart IOT	Status	Incomplete		Currency	USD
Buyer	OMAIMA MOHAMED 2	Total	3528			
P-Card						

Shipments More Status Item

Num	Org	Ship-To	UOM	Quantity	Price	Promised	Need-By
1	#1	egypt	Each	200	17.64	20-10-2024 00:00:00	20-10-2024 00:00:00

Item PIR 005 Motion Sensors

Receiving Controls... Agreement Distributions Approve...

## • Approving the Blanket Purchase Agreement

Oracle Applications - it

File Edit View Folder Tools Actions Window Help

Approve Document - 202440052-1

**Approval Details** Additional Options

**Encumbrance**

Reserve  Unreserve  
 Use GL Override  Use Document GL Date to Unreserve

Unreserve Date   
Accounting Date

**Approval**

Submit for Approval  Forward

Forward From   
Approval Path   
Forward To

Note   
Change Summary

**Transmission Methods**

Print  XML  
 Fax  EDI  
 E-Mail FAX Number   
E-Mail Address

OK Cancel (B)

Oracle Applications - it

File Edit View Folder Tools Actions Window Help

Purchase Order Summary to Releases - 202440052-1

Operating Unit Vision Operations  
PO, Rev 202440052 0  
Supplier Smart IOT  
Buyer OMAIMA MOHAMED 2  
P-Card

Release 1 0  
Site Cairo  
Status Approved  
Created 13-10-2024 14:50:2  
Contact   
Currency USD  
Total 3,528.00

**Shipments** More Status Item

Num	Shipment	Org	Ship-To	UOM	Quantity	Price	Promised
1	M1	egypt		Each	200	17.64	20-10-2024 00:00:00

Item PIR 005 Motion Sensors

Receiving Controls... Agreement Distributions Approve...

## **Step 7:**

## Receiving the Order

- Navigate to -> Receiving -> Receipts (M1)
  - Search using PO Number: 202440052
  - Click Find.



The screenshot shows the Oracle Applications interface with the title bar "Oracle Applications - it". The menu bar includes File, Edit, View, Folder, Tools, Window, Help. A toolbar with various icons is at the top. The main window has a title "Receipts (M1)" and a sub-title "Find Expected Receipts (M1)".

**Supplier and Internal** tab is selected. Search criteria include:

- Operating Unit: Vision Operations
- Source Type: All
- Purchase Order: [ ]
- Line: [ ]
- Requisition: [ ]
- Line: [ ]
- Supplier: [ ]
- Release: [ ]
- Shipment: [ ]
- Shipment: [ ]
- Supplier Site: [ ]

Include Closed POs

**Receiving Location**: [ ]

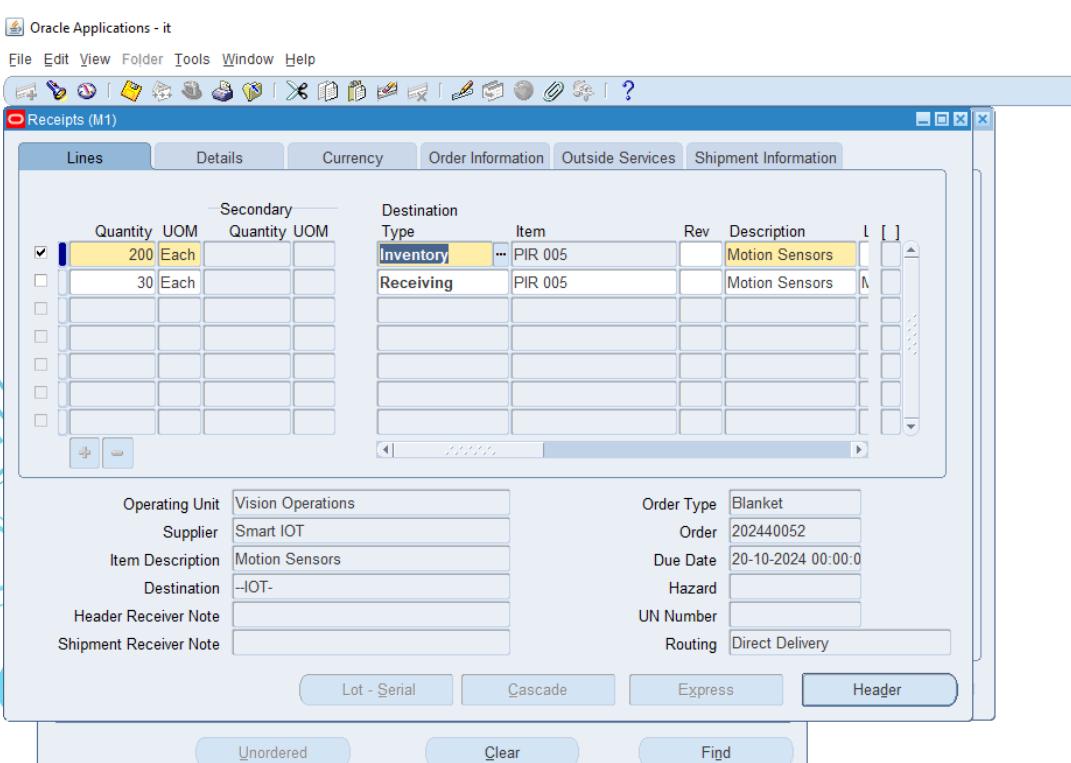
**Item** tab is selected. Search criteria include:

- Item, Rev: [ ]
- Category: [ ]
- Description: [ ]
- Supplier Item: [ ]

Buttons at the bottom: Unordered, Clear, Find.

## Completing the Receiving Process

- Select the lines.
  - Set the Destination Type: Inventory.
  - Select the Sub-inventory.
  - Save.

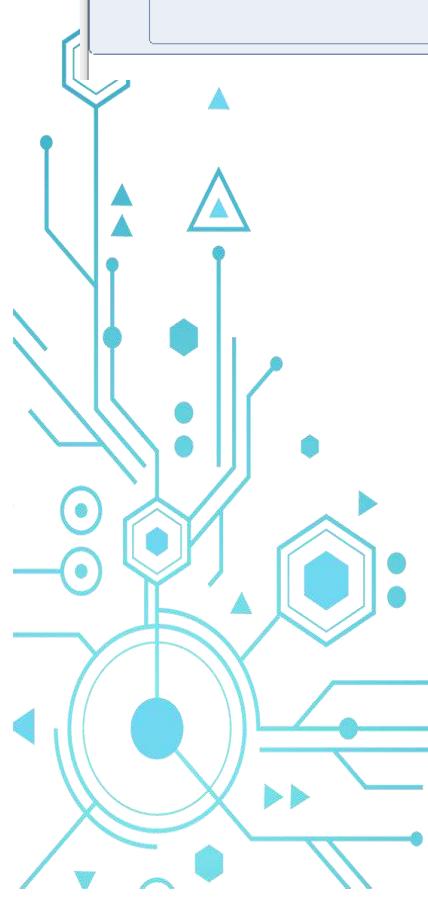


## 20. Sourcing from Quotation

### Step 1:

Setting the Use Approved Supplier Flag for Item (LDR 004)

- Navigate to -> Items -> Organization Items
- Select Organization: V1/M1.
- Enter Item: LDR 004.
- Click Find.
- Select the Purchasing Tab
- Check the Use Approved Supplier Box.
- Save Changes.

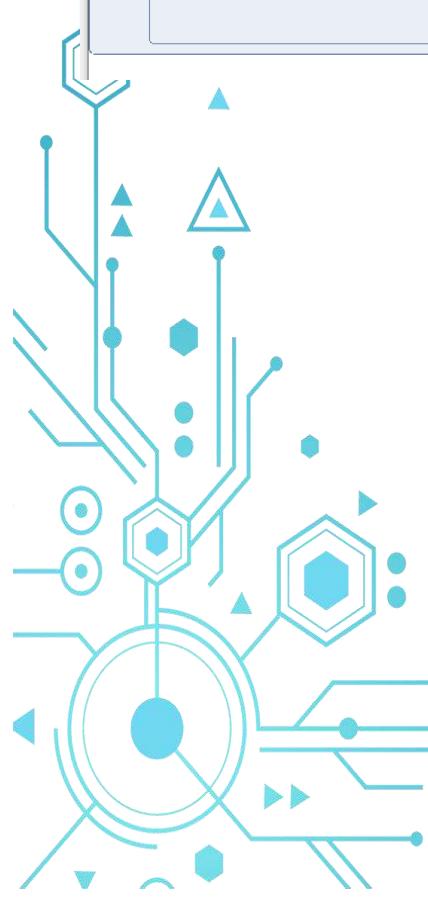


Oracle Applications - it

File Edit View Folder Tools Actions Window Help

Master Item (V1)

Organization: V1	Vision Operations	Display Attributes
Item: LDR 004		<input type="radio"/> Master <input type="radio"/> Org <input checked="" type="radio"/> All
Description: Light Sensors	[...]	
Main Inventory Bills of Material Asset Management Costing Purchasing Receiving Physical Attributes		
<input checked="" type="checkbox"/> Purchased <input checked="" type="checkbox"/> Purchasable <input type="checkbox"/> Allow Description Update <input checked="" type="checkbox"/> Use Approved Supplier <input type="checkbox"/> Outside Processing Item <input type="checkbox"/> Outsourced Assembly Unit Type:    RFQ Required: No Taxable: No Input Tax Classification Code:    Receipt Required: Yes Invoice Matching: Inspection Required: Default Buyer:    Unit of Issue: Receipt Close Tolerance: %    Invoice Close Tolerance: % UN Number:    Hazard Class: List Price: 25    Market Price: Price Tolerance: 0 %    Rounding Factor: Encumbrance Account: Expense Account: 01-510-7530-0000-000 Asset Category: 		



Master Item (V1)

Organization Item (M1)

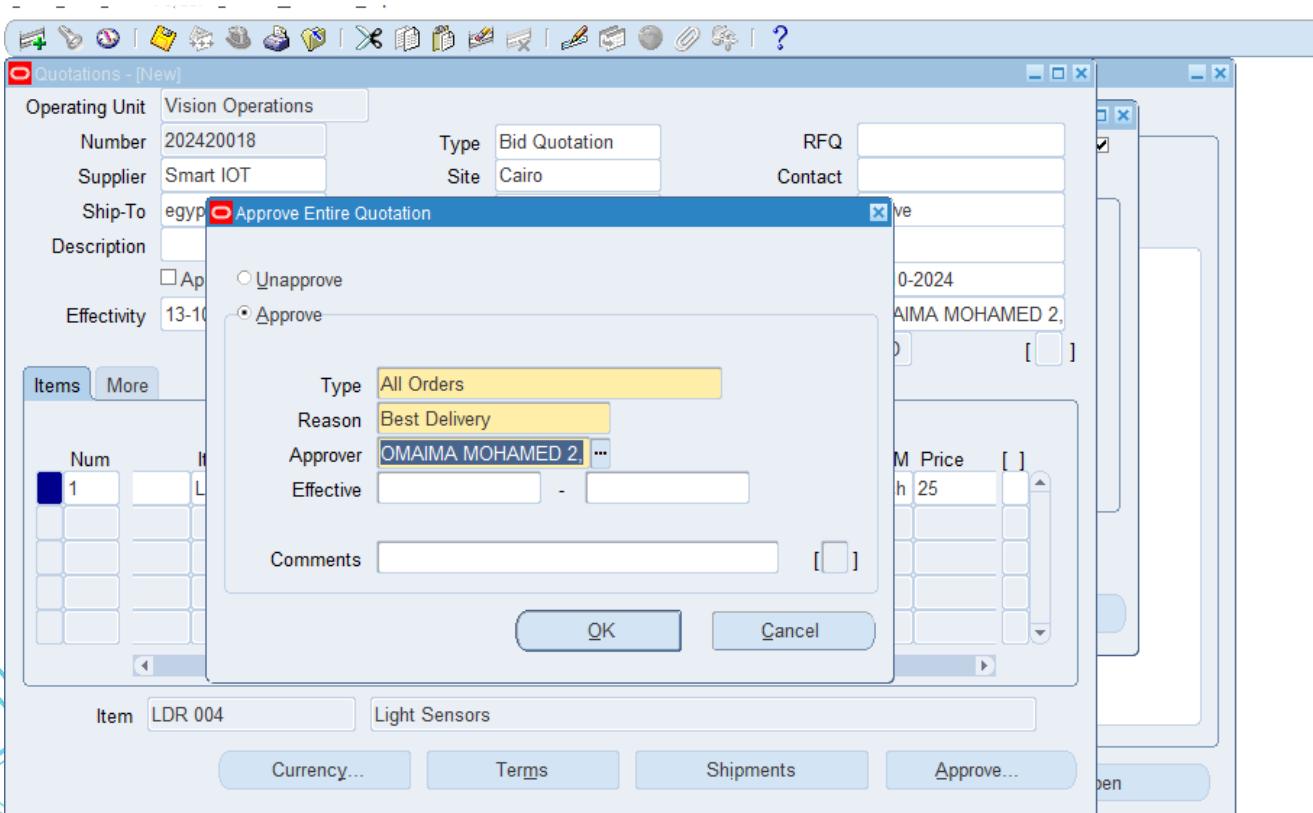
Organization: M1	Seattle Manufacturing	Display Attributes
Item: LDR 004		<input type="radio"/> Master <input type="radio"/> Org <input checked="" type="radio"/> All
Description: Light Sensors	[...]	
Main Inventory Bills of Material Asset Management Costing Purchasing Receiving Physical Attributes		
<input checked="" type="checkbox"/> Purchased <input checked="" type="checkbox"/> Purchasable <input checked="" type="checkbox"/> Allow Description Update <input checked="" type="checkbox"/> Use Approved Supplier <input type="checkbox"/> Outside Processing Item <input type="checkbox"/> Outsourced Assembly Unit Type:    RFQ Required: No Taxable: No Input Tax Classification Code:    Receipt Required: Yes Invoice Matching: Inspection Required: Default Buyer: OMAIMA MOHAMED 2,    Unit of Issue: Receipt Close Tolerance: %    Invoice Close Tolerance: % UN Number:    Hazard Class: List Price: 25    Market Price: Price Tolerance: 0 %    Rounding Factor: Encumbrance Account: Expense Account: 01-620-7530-0000-000 Asset Category: 		

FRM-40400: Transaction complete: 1 records applied and saved.  
Record: 1/1 ... <OSC>

## Step 2:

### Creating an RFQ and Quotation for Item LDR 004

- RFQs and Quotations:
- Navigate to -> RFQs and Quotations -> Quotations.
- Enter Header Details.
  - Type: Bid Quotation
  - Supplier: Smart IOT
  - Site: Cairo
  - Ship-To: Egypt
  - Bill-To: M1-Seattle Mfg
- Enter Line Details:
  - Item: LDR 004
  - Description: Light Sensors
  - Category: DEPI.SENS
- Save and approve.
- Approve the Entire Quotation.
  - Type: All Orders
  - Reason: Best Delivery
  - Click OK to finalize the approval



- Quotation Status: Approved

Oracle Applications - it

File Edit View Folder Tools Window Help

Quotations - [New]

Operating Unit: Vision Operations  
Number: 20240018  
Supplier: Smart IOT  
Ship-To: egypt  
Description:  
Effectivity: 13-10-2024

Approve Entire Quotation  
 Unapprove  
 Approve

Type: All Orders  
Reason: Best Delivery  
Approver: OMAIMA MOHAMED 2,  
Effective: -  
Comments:

Note: Quotation lines have been Approved.

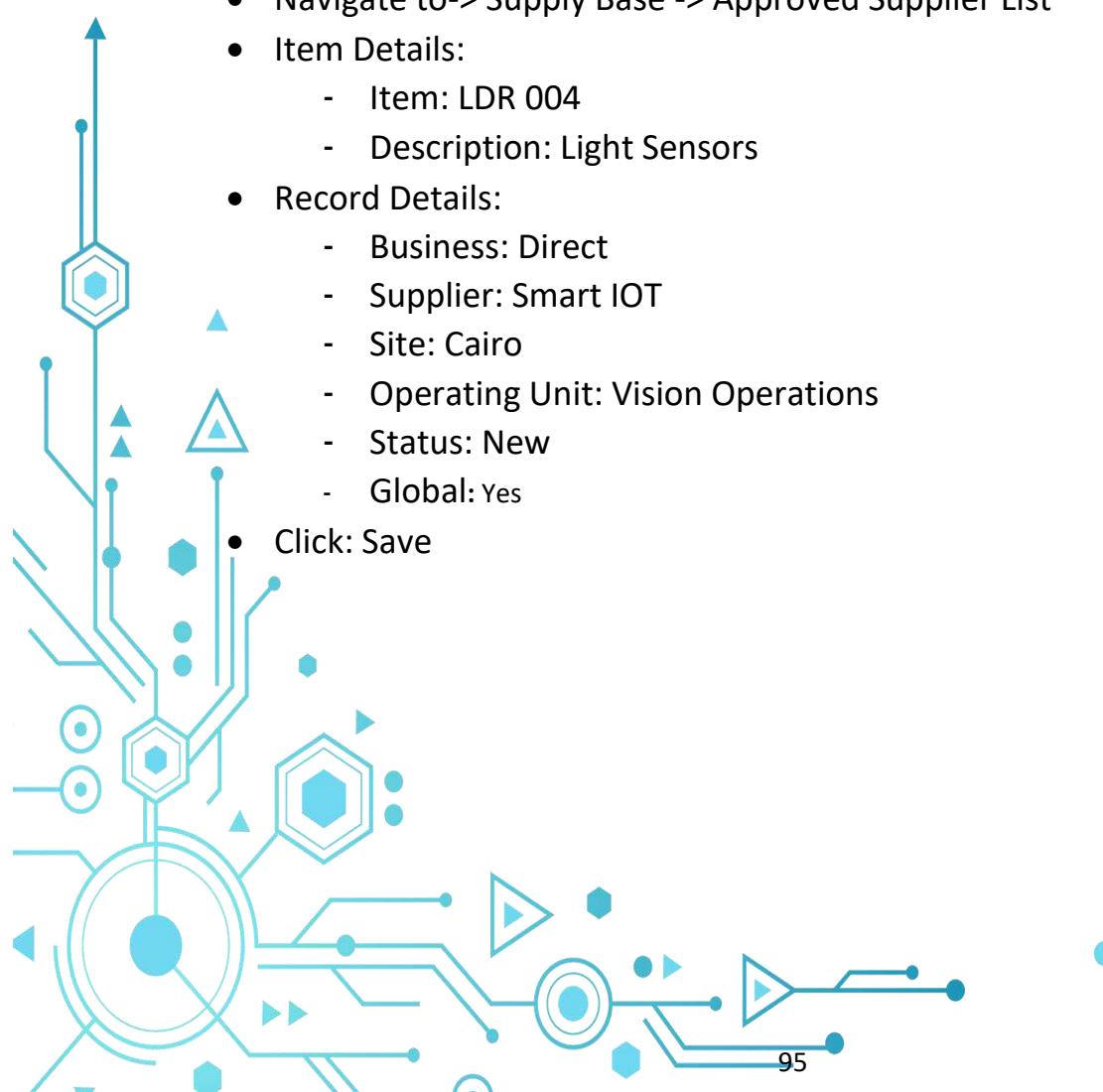
OK Cancel

Items More  
Num 1  
Item LDR 004 Light Sensors  
Currency... Terms Shipments Approve...

### Step 3:

#### Updating the Approved Supplier List

- Navigate to-> Supply Base -> Approved Supplier List
- Item Details:
  - Item: LDR 004
  - Description: Light Sensors
- Record Details:
  - Business: Direct
  - Supplier: Smart IOT
  - Site: Cairo
  - Operating Unit: Vision Operations
  - Status: New
  - Global: Yes
- Click: Save



Approved Supplier List (V1)

Type	Commodity	Item	Description
Item		LDR 004	Light Sensors

**Suppliers**

Key Attributes   Record Details   Comments

Business	Supplier	Site	Operating Unit	Status	Disabled	Global?	Owning Org	[ ]
Direct	Smart IOT	Cairo	Vision Operations	New	<input type="checkbox"/>	Yes	Vision Operations	[ ]
					<input type="checkbox"/>			[ ]
					<input type="checkbox"/>			[ ]
					<input type="checkbox"/>			[ ]
					<input type="checkbox"/>			[ ]
					<input type="checkbox"/>			[ ]
					<input type="checkbox"/>			[ ]

Attributes

- Set Document Type:
  - Document Type: Quotation

Approved Supplier List (V1)

Supplier-Item Attributes (V1)

Document Types

Find %

Document Type

Blanket Purchase Agreement  
Contract Purchase Agreement  
**Quotation**

Purchasing UOM

Release Method

Price Update Tolerance %

Country of Origin [ ]

Inventory

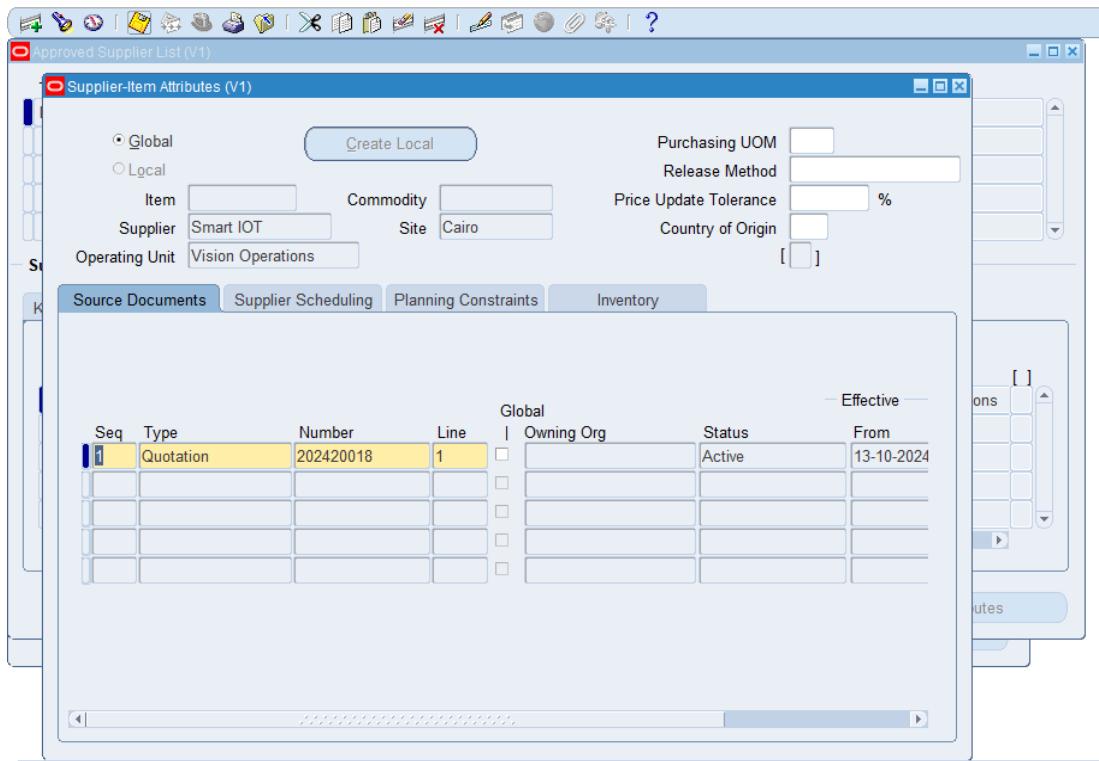
Effective

Status From

Choices in list: 3

#### Step 4:

- Setting Release Method for Approved Supplier List
- Navigate to -> Supply Base -> Approved Supplier List
- Record Details:
  - Release Method: Automatic Release
  - Type: Quotation
  - Quotation Number: 202420018
- Click Save.



#### Step 5:

##### Creating a Sourcing Rule

- Navigate to-> Supply Base -> Sourcing Rules
- Enter the following details:
  - Rule Name: DEPI Sourcing
  - All Orgs: Selected
  - From Date: [Today's date]
  - Type: Buy From
  - Supplier: Smart IOT
  - Site: Cairo
  - Allocation %: 100
  - Rank: 1
- Click Save.

Oracle Applications - it

File Edit View Folder Tools Window Help

**Sourcing Rule (V1)**

Name	DEPI Sourcing	All Orgs	Planning Active
Description		<input type="radio"/>	<input type="radio"/>
Effective Date			
From Date	13-10-2024	To Date	29-10-2024
<input type="button" value="View"/> <input type="button" value="Purge"/> <input type="button" value="Copy Shipping Orgs From..."/> <input type="button" value="Assignment Set..."/>			

**Shipping Organization**

Type	Org	Supplier	Supplier Site	Allocation %	Rank	Shipping Method	Intransit Time
Buy From		Smart IOT	Cairo	100	1		
<input type="button" value="Open"/>							

## Step 6:

### Verifying the Default Assignment Set

- Navigate to -> System Administrator -> Personal Profile User Values Personal Profiles
- Click: View > Find
- Enter the Profile:
  - Profile: MRP: Default Sourcing Assignment Set
- Click Find
- Verify the default value is set to Supplier Scheduling.

Oracle Applications - it

File Edit View Folder Tools Window Help

**Find System Profile Values**

Display	<input checked="" type="checkbox"/> Site
	<input type="checkbox"/> Application
	<input type="checkbox"/> Responsibility
	<input type="checkbox"/> Server (B)
	<input type="checkbox"/> Organization
	<input checked="" type="checkbox"/> User
	OMAIMA MOHAMED 2
	<input checked="" type="checkbox"/> Profiles with No Values
Profile	MRP:Default Sourcing Assignment Set
	<input type="button" value="Find"/> <input type="button" value="Clear"/>
<input type="button" value="Open"/>	

Profile Option Name

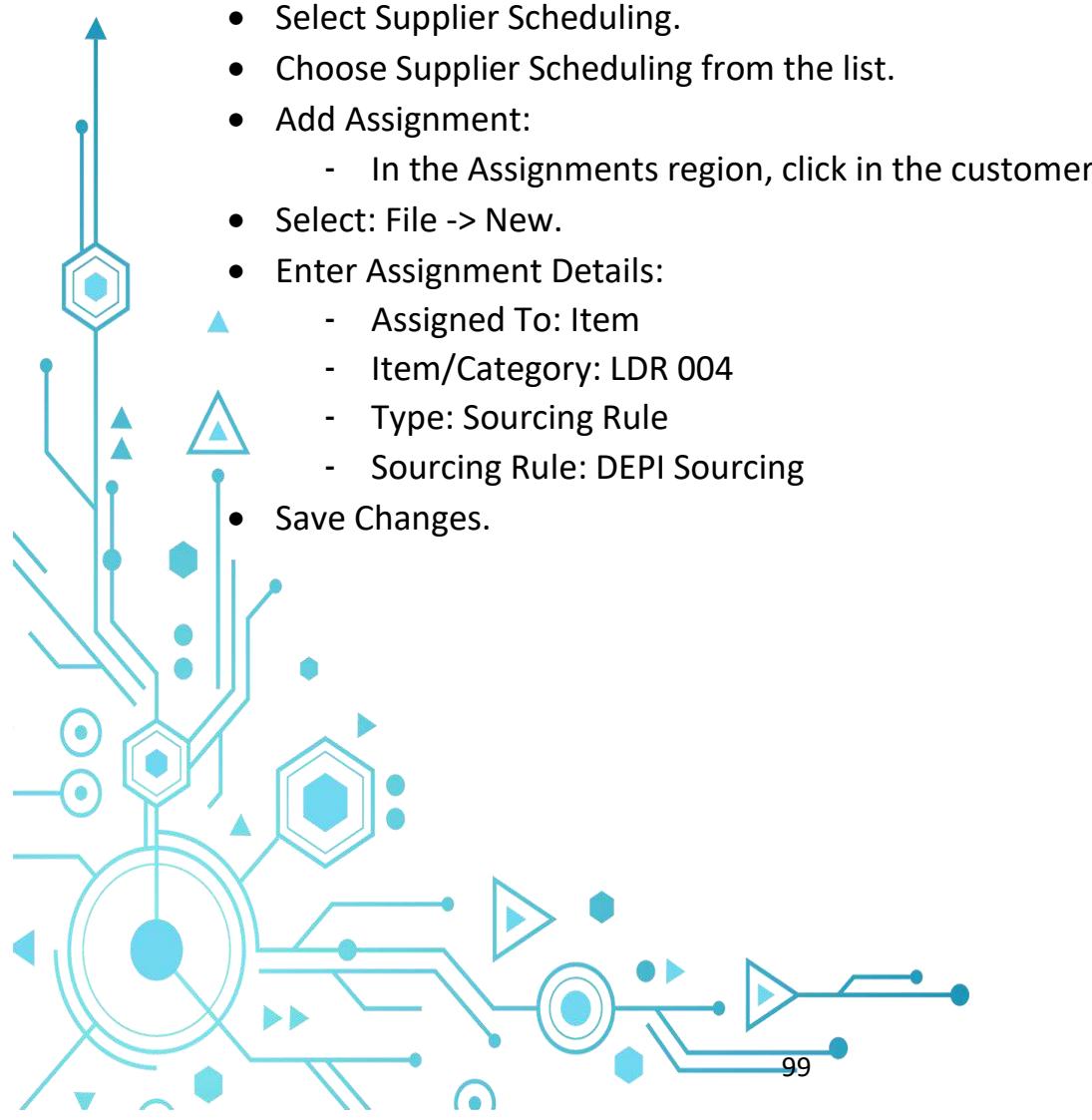
- CWB : SMTP Port
- Knowledge: Spell Checker
- Service: Default Project Info
- %WSH%
- @JL : Perform Inflation Adjustment
- ABM: ABM Analyzer Help
- ABM: ABM Help
- ABM: Dark Color RGB String
- ABM: Java Currency Format String
- ABM: Java Date Format String

+ Responsibility  
+ ORACLE  
+ AuditTrail  
Web PL/SQL

## Step 7:

## Creating a Sourcing Rule Assignment

- Navigate to ->Sourcing > Supply Base > Assign Sourcing Rule.
  - View -> Find.
  - Select Supplier Scheduling.
  - Choose Supplier Scheduling from the list.
  - Add Assignment:
    - In the Assignments region, click in the customer field.
  - Select: File -> New.
  - Enter Assignment Details:
    - Assigned To: Item
    - Item/Category: LDR 004
    - Type: Sourcing Rule
    - Sourcing Rule: DEPI Sourcing
  - Save Changes.



Oracle Applications - it

File Edit View Folder Tools Window Help

Sourcing Rule / Bill of Distribution Assignments

Assignment Set	Supplier scheduling
Description	
Assignments	
Assigned To	Item
Item / Category	LDR 004
Description	Light Sensors
Type	Sourcing Rule
Sourcing Rule / BoD	DEPI Sourcing

Purge Copy from... View Sourcing Rule/BOD View Supply Chain Bill Open

Oracle Applications - it

File Edit View Folder Tools Window Help

Sourcing Rule / Bill of Distribution Assignments

Assignment Set	Supplier Scheduling
Description	Sourcing Rules for Supplier Scheduling
Assignments	
Assigned To	Item
Item / Category	:M99131
Description	IC Modem
Type	Sourcing Rule
Sourcing Rule / BoD	Hard Drives
Assigned To	Item
Item / Category	:M25287
Description	Hard Drive - 500GB
Type	Sourcing Rule
Sourcing Rule / BoD	Hard Drives
Assigned To	Item
Item / Category	:M99998
Description	IC Browser
Type	Sourcing Rule
Sourcing Rule / BoD	MRO
Assigned To	Item
Item / Category	DR 004
Description	Light Sensors
Type	Sourcing Rule
Sourcing Rule / BoD	DEPI Sourcing
Assigned To	Item
Item / Category	:S15701
Description	Latex Gloves
Type	Sourcing Rule
Sourcing Rule / BoD	MRO
Assigned To	Item
Item / Category	:S15601
Description	Machine Oil
Type	Sourcing Rule
Sourcing Rule / BoD	MRO
Assigned To	Item
Item / Category	:S15501
Description	Electro Static Discha
Type	Sourcing Rule
Sourcing Rule / BoD	MRO
Assigned To	Item
Item / Category	:0000
Description	Router - Approved St
Type	Sourcing Rule
Sourcing Rule / BoD	Router
Assigned To	Item
Item / Category	:0000
Description	Leather Computer Ca
Type	Sourcing Rule
Sourcing Rule / BoD	Computer Case
Assigned To	Item
Item / Category	:M78456
Description	USB Flash Drive (16G)
Type	Sourcing Rule
Sourcing Rule / BoD	Xfer-M1,D2,M2,M3

Purge Copy from... View Sourcing Rule/BOD View Supply Chain Bill Open

## Step 8: Creating a Requisition and Viewing Sourcing Information

- Navigate to the Requisition Window.

Operating Unit: Vision Operations

- Supplier: Smart IOT

- Site: Cairo

- Enter Requisition Lines:

- Item: LDR 004

- Quantity: 100

100

- Verify Quotation References.

## Step 9:

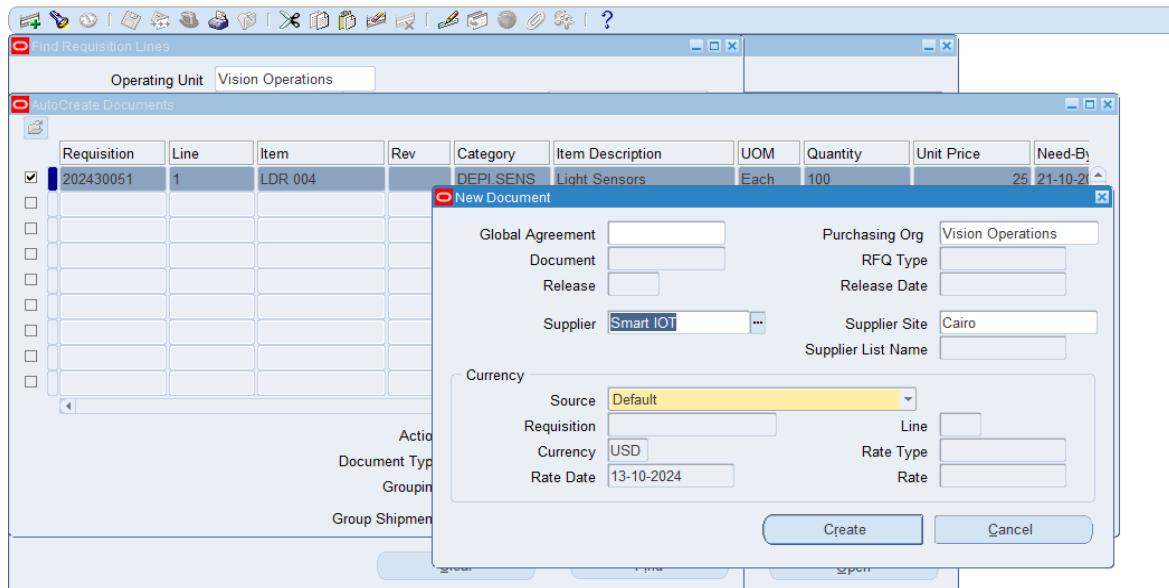
### Auto Creating a Standard Purchase Order

- Navigate to -> Auto Create.
- Enter Requisition Number.
- Find Auto Create Documents.
- Click (B) Find

## Step 10:

### Create Purchase Orders

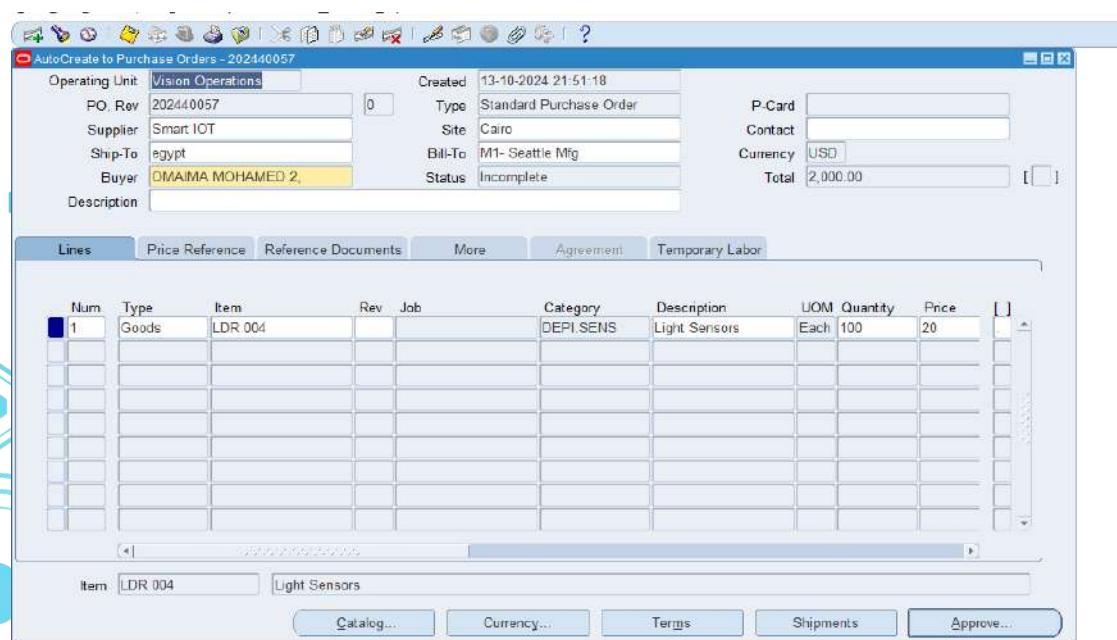
- Select Supplier.
- Choose Supplier: Smart IOT.
- Set Source: Default.
- Click Create to generate the purchase orders.



## Step 11:

### Finalize Auto Created Purchase Orders

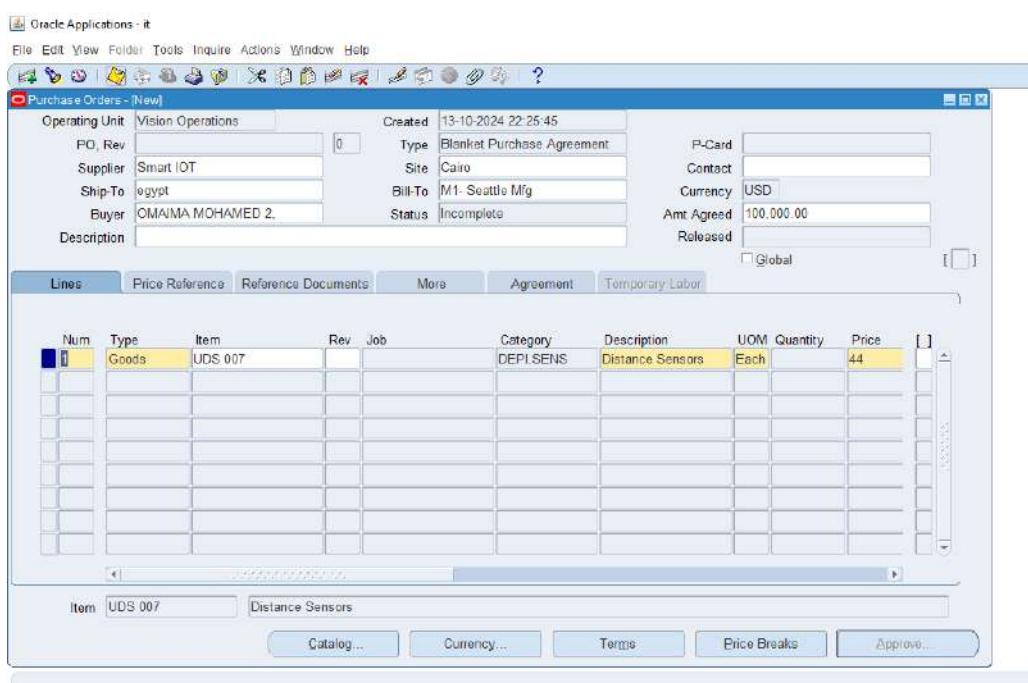
- Navigate to Auto Create Purchase Orders.
  - Supplier: Smart IOT
  - Site: Cairo
- Select Lines:
  - Item: LDR 004
  - Quantity: 100.
- ▲● Save and Approve.



## 21. Sourcing Blanket Purchase Agreement

### Step 1:

- Navigate to Create a Purchase Order.
  - Supplier: Smart IOT
  - Site: Cairo
  - Agreed Amount: \$100,000
- Ship-To: Egypt
- Enter Line Information:
  - Item: UDS 007
  - Description: Distance Sensors
- Save and Approve



The screenshot shows the Oracle Applications interface for creating a new purchase order. The top header bar includes 'File Edit View Folder Tools Inquire Actions Window Help'. The main window title is 'Purchase Orders - [New]'. The operating unit is set to 'Vision Operations'. The PO number is '0'. The Type is 'Blanket Purchase Agreement'. The supplier is 'Smart IOT', site is 'Cairo', and bill-to is 'M1 - Seattle Mfg'. The currency is 'USD' and the amount agreed is '100,000.00'. The status is 'Incomplete'. The 'Lines' tab is selected, showing a single line item for 'UDS 007' with a quantity of '44'. The description is 'Distance Sensors'. The category is 'DEPISENS'. The price is '44'. At the bottom, there are buttons for 'Catalog...', 'Currency...', 'Terms', 'Price Breaks', and 'Approve...'. A blue arrow points upwards from the bottom of the page towards this window.

### Step 2:

Updating the Approved Supplier List for UDS 007

- Navigate to → Supply Base → Approved Supplier List
- Enter Item Details:
  - Item: UDS 007
  - Description: Distance Sensors
- Record Details:
  - Business: Direct
  - Supplier: Smart IOT
  - Site: Cairo
  - Status: New
  - Global: Yes
- Click on Attributes

Approved Supplier List (M1)

Type	Commodity	Item	Description
Item		UDS 007	Distance Sensors

**Suppliers**

Key Attributes Record Details Comments

Business	Supplier	Site	Operating Unit	Status	Disabled	Global?	Owning Org
Direct	Smart IOT	Cairo	Vision Operations	New	<input type="checkbox"/>	Yes	Seattle Manufactur

Attributes

### Step 3:

Updating Source Documents for UDS 007

- Navigate to -> Supply Base -> Approved Supplier List
- Source Documents:
  - Type: Blanket Purchase Agreement
  - Number: 202440058
- Save Changes

Approved Supplier List (M1)

Supplier-Item Attributes (M1)

Global Local

Create Local

Purchasing UOM  
Release Method  
Price Update Tolerance %  
Country of Origin

Item UDS 007 Commodity  
Supplier Smart IOT Site Cairo  
Operating Unit Vision Operations

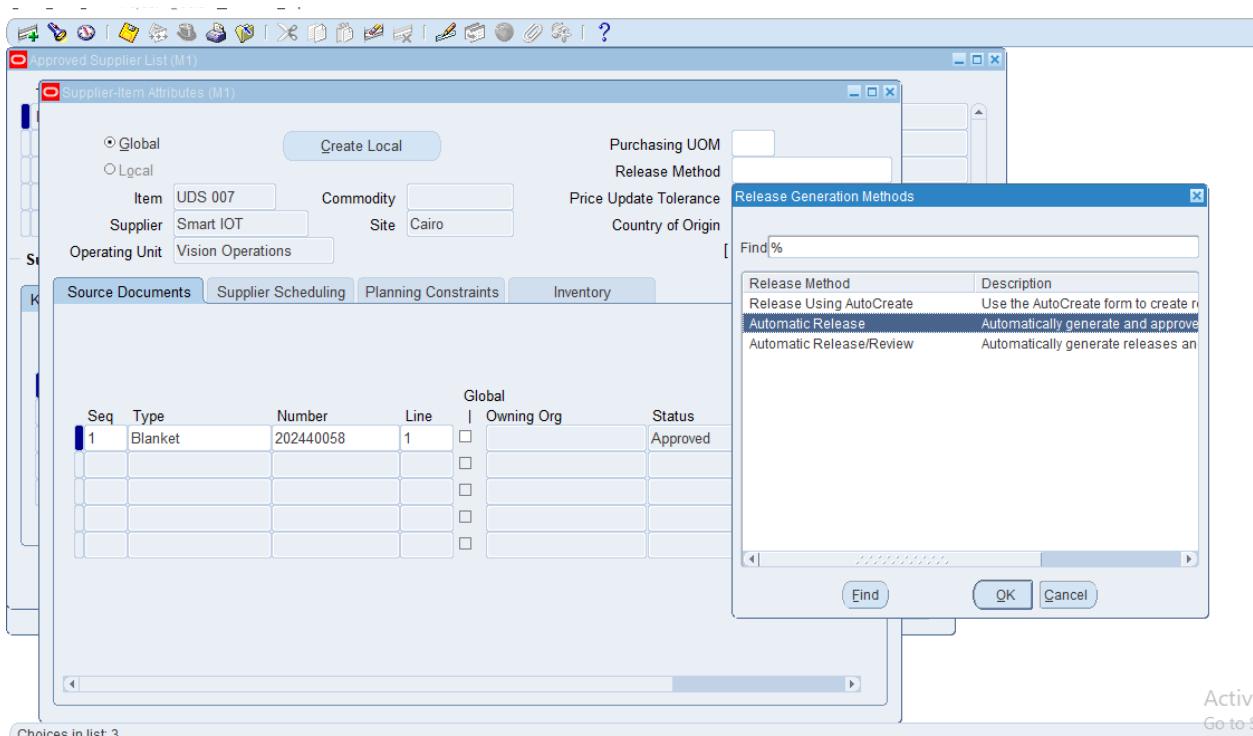
Source Documents Supplier Scheduling Planning Constraints Inventory

Seq	Type	Number	Line	Global	Owning Org	Status	From	Effective
1	Blanket Purchase Ag	202440058	1	<input type="checkbox"/>		Approved		

## Step 4:

### Setting the Release Method for UDS 007

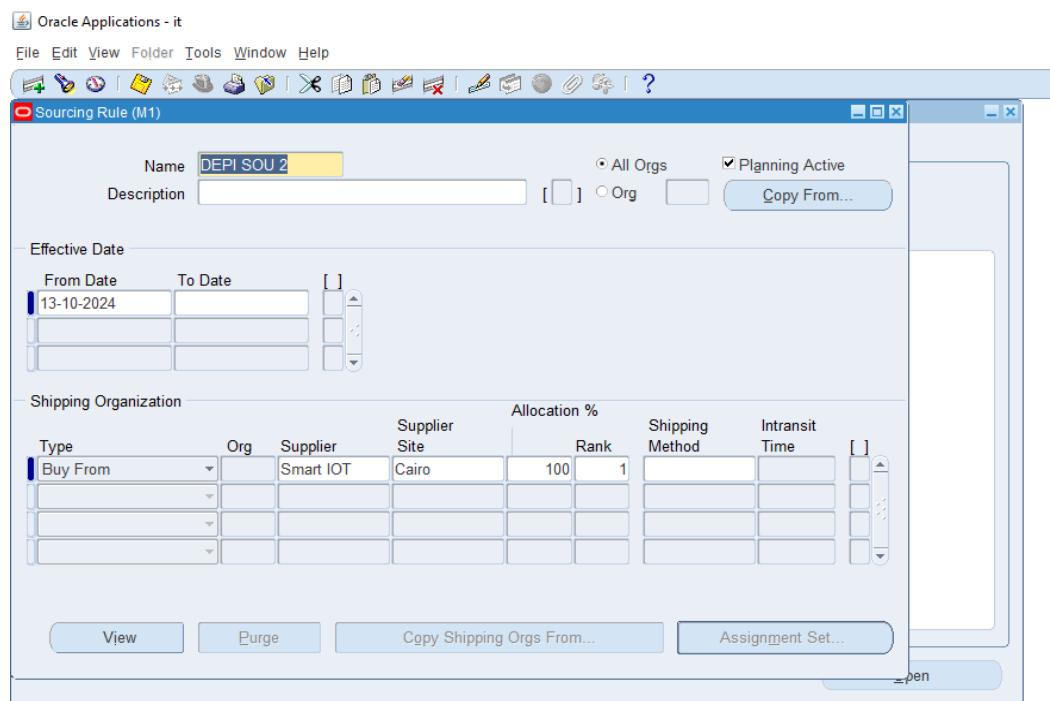
- Navigate to -> Supply Base -> Approved Supplier List
- Locate the item: UDS 007.
- Set Release Method:
  - Release Method: Automatic Release
- Save Changes



## Step 5:

### Creating a New Sourcing Rule

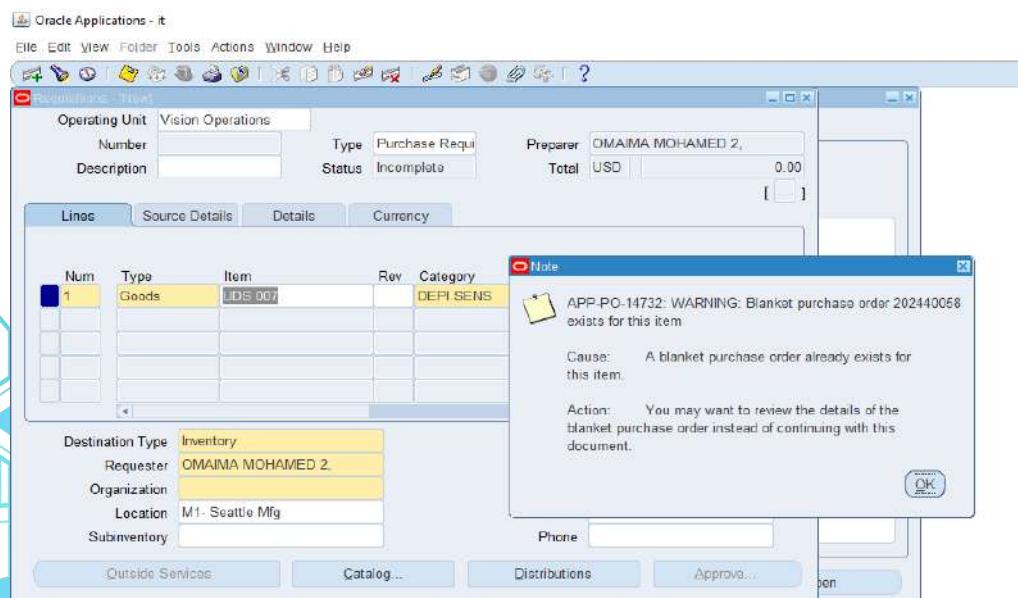
- Navigate to -> Supply Base -> Approved Supplier List
- Enter Sourcing Rule Details:
  - Rule Name: DEPI SOU 2
  - Effective Date: Today's date
  - All Orgs: Selected
  - Type: Buy



## **Step 6:**

# Sourcing Rule Assignment

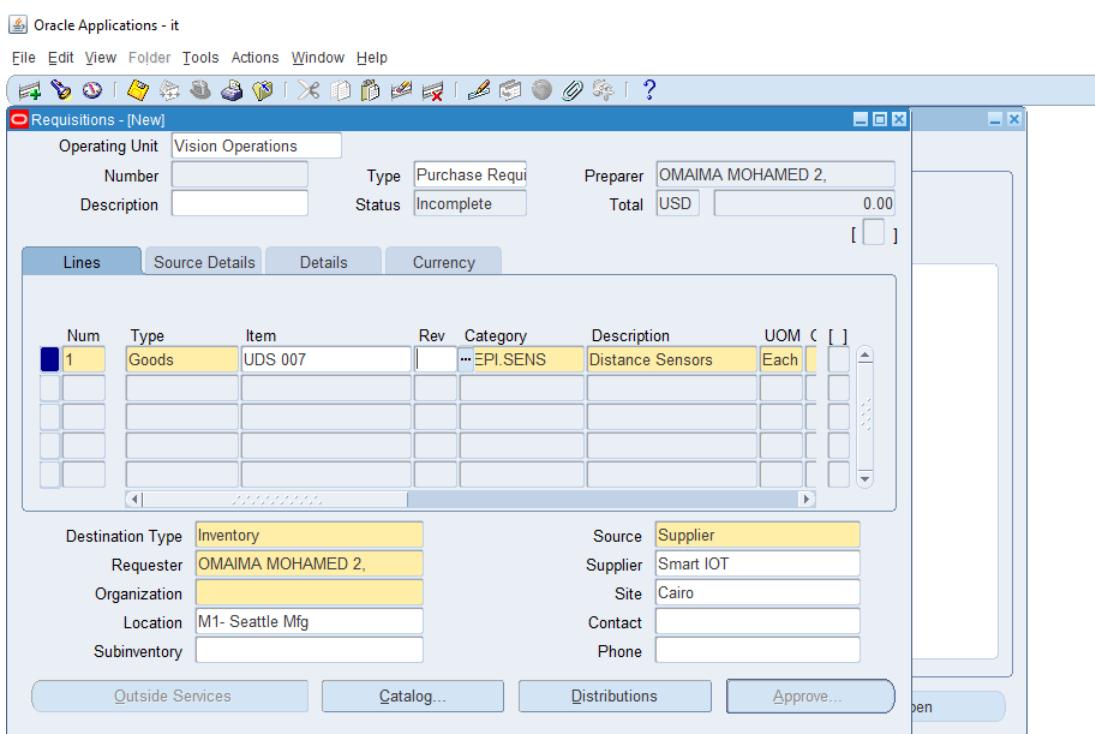
- Navigate to -> Supply Base -> Approved Supplier List
  - Choose Supplier Scheduling
  - In the Assignments Region:  
Click in the customer field.  
Go to File -> New.
  - Enter Assignment Details:
    - Assigned To: Item
    - Item/Category: UDS 007
    - Type: Sourcing Rule
    - Sourcing Rule: DEPI SOU 2
  - Save the Changes



## Step 7:

### Completing the Requisition for UDS 007

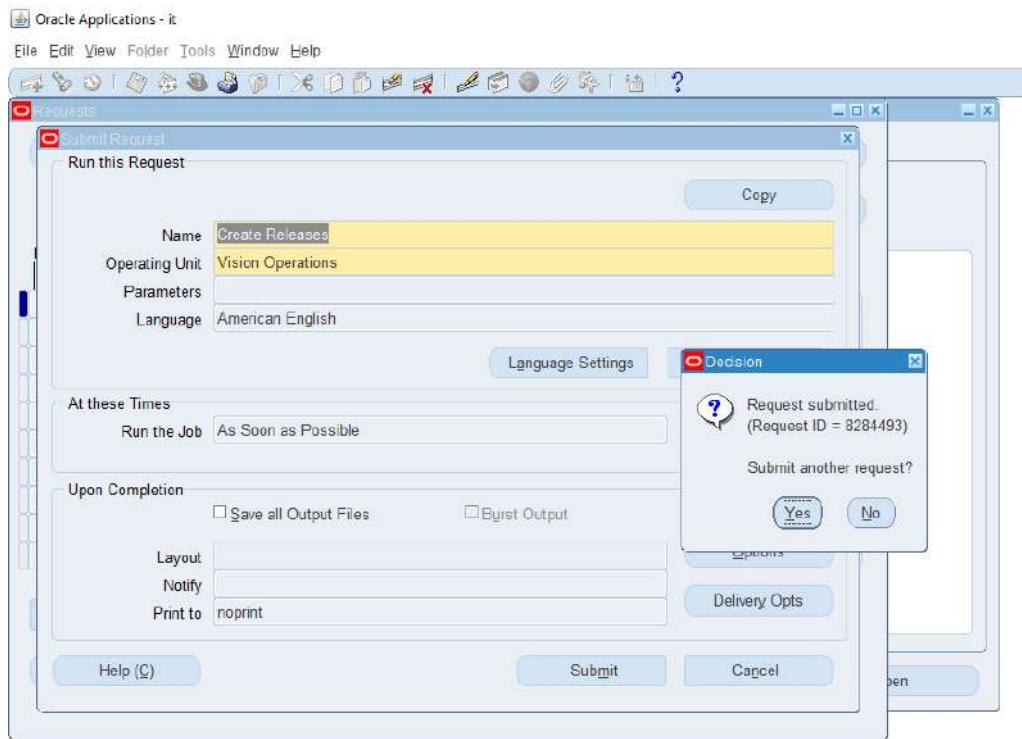
- Navigate to -> Requisitions -> Requisitions
- Enter the Item:
  - Item: UDS 007
- Source Line Details:
  - Source: Supplier
  - Supplier: Smart IOT
  - Site: Cairo
- Click Save.
- Click Approve.



## Step 8:

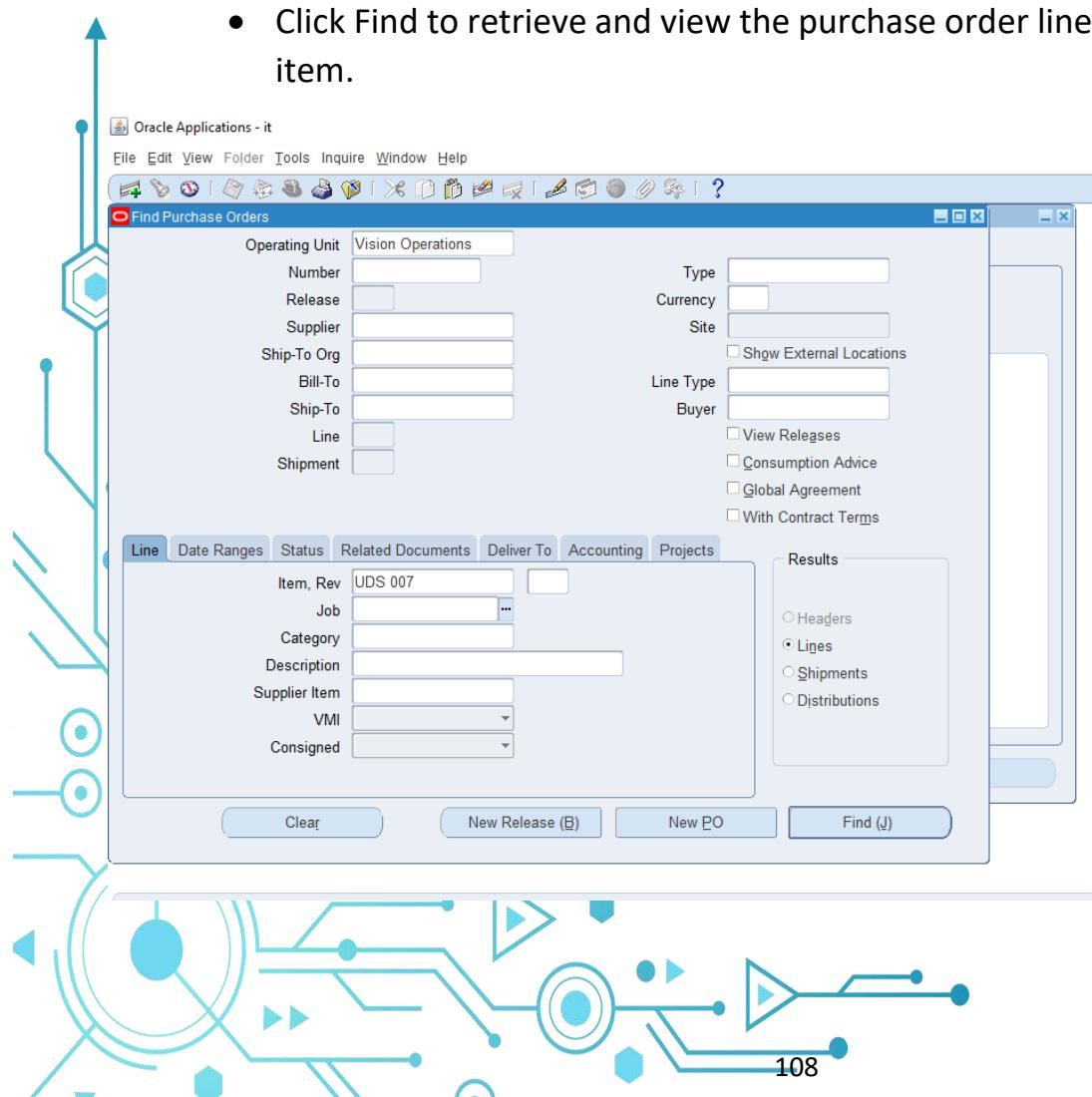
### Submitting a New Request for Creating Releases

- Navigate to -> View -> Requests
- Submit a New Request.
- Request Name: Create Releases
- Click Submit to finalize the request.



### Step 9:

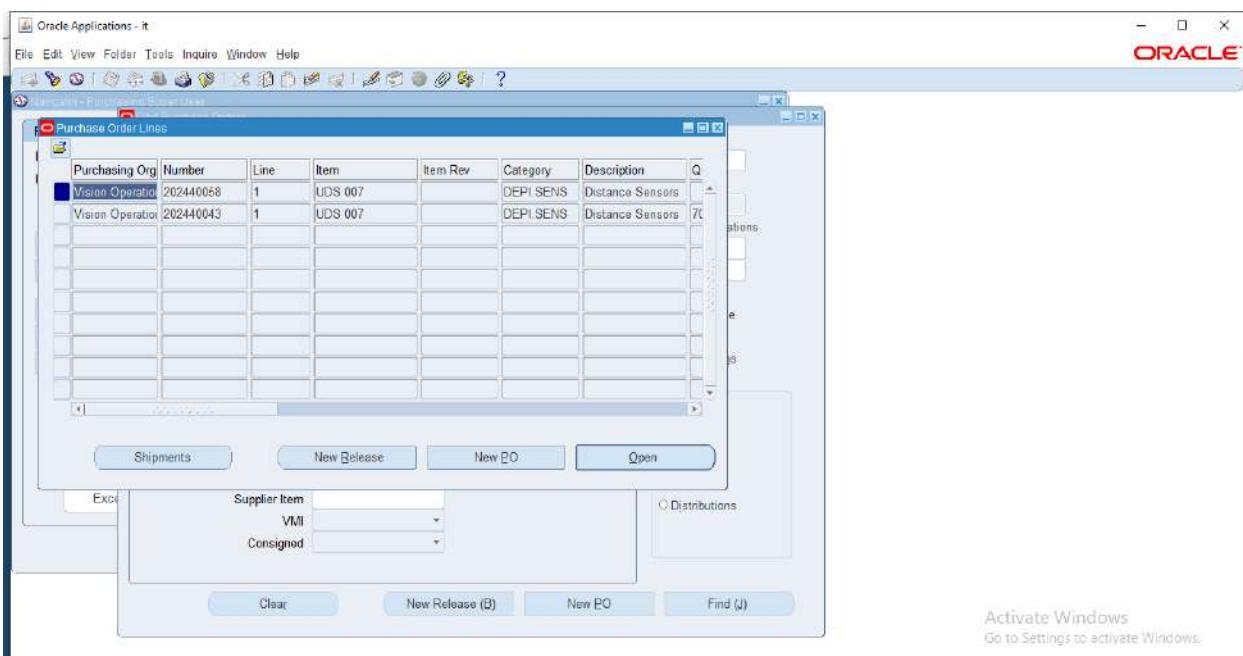
- Navigating to -> Purchase Orders -> Purchase Orders Summary
- Search for the Item:
- Enter Item: UDS 007 in the appropriate field.
- Open Purchase Order Lines.
- Click Find to retrieve and view the purchase order lines associated with the item.



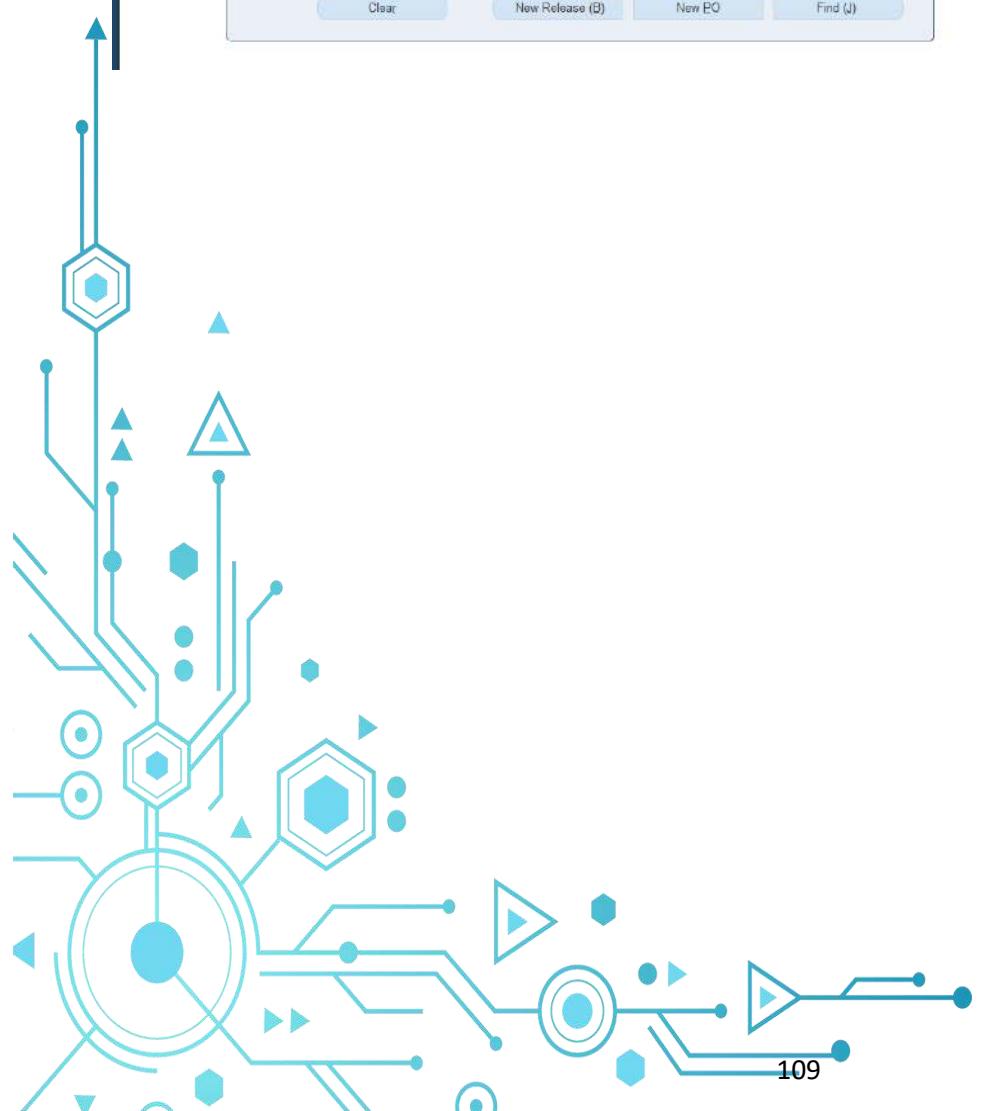
## Step 10:

### Creating a New Release

- Select the Purchase Order Line.
- In the Purchase Orders Summary, locate and select the line for the item UDS 007.
- Create a New Release.
- Click on New Release to initiate the release process.



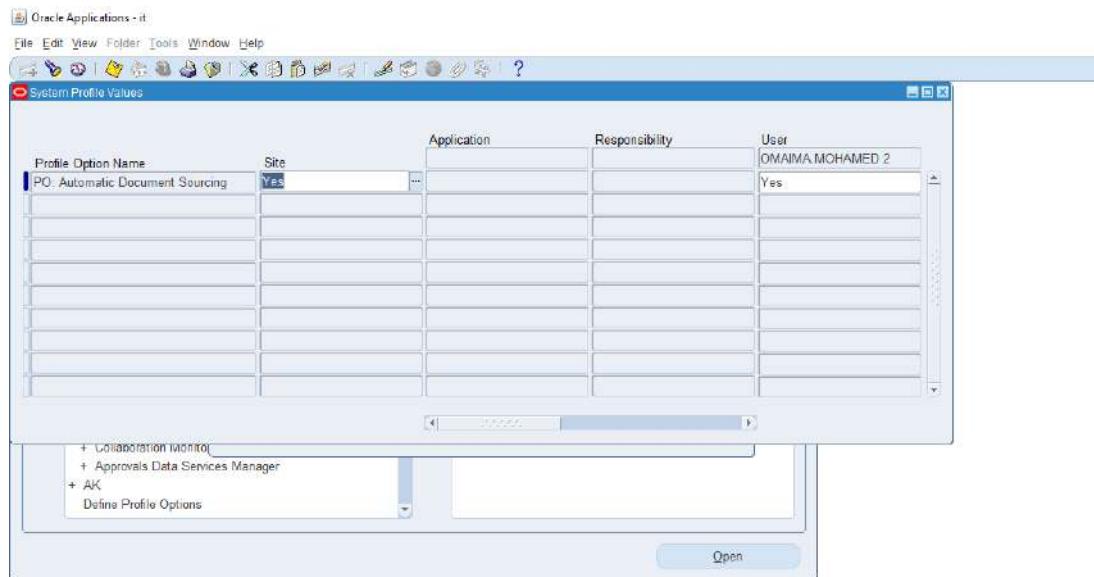
Activate Windows  
Go to Settings to activate Windows.



## 22. Automatic Sourcing

### Step 1:

- Navigate to the System Profiles Window.  
Path: Personal Profiles.
- Query the Profile:  
In the Personal Profiles window, use the query tool to search for PO%Auto%.
- Verify the Setting:  
Check that the profile PO: Automatic Document Sourcing is set to "Yes."



### Step 2:

#### Create a Requisition

- Navigate to -> Requisitions -> Requisitions.
- Choose Vision Operations from the Operating Unit dropdown.
- Enter Line Details:
  - Item: MQ 008 (Gas sensors)
  - Quantity: 100
  - Supplier: Smart IOT
- Click Save.



Oracle Applications - it

File Edit View Folder Tools Actions Window Help

**Requisitions - [New]**

Operating Unit	Vision Operations	Type	Purchase Requi	Preparer	OMAIMA MOHAMED 2,
Number	202430053	Status	Incomplete	Total	USD 1,000.00
Description					[ ]

Lines    Source Details    Details    Currency

Num	Type	Item	Rev	Category	Description	UOM	C
1	Goods	MQ 008		DEPI.SENS	Gas Sensors	Each	1

Destination Type: Inventory    Source: Supplier

Requester: OMAIMA MOHAMED 2,    Supplier: Smart IOT

Organization: Seattle Manufacturing    Site:

Location: M1- Seattle Mfg    Contact:

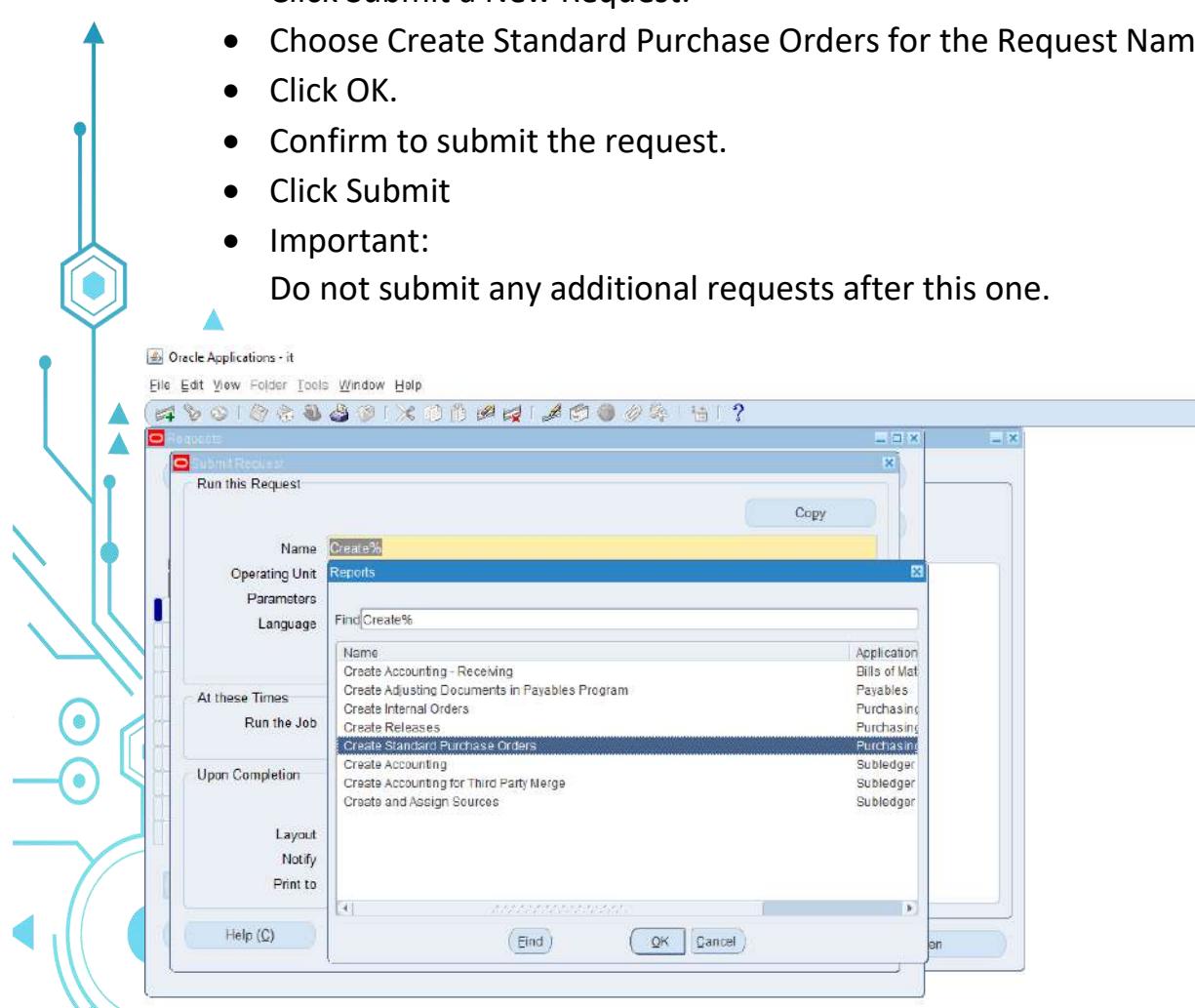
Subinventory: Phone:

Outside Services    Catalog...    Distributions    Approve...

### **Step 3:**

## **Submitting a New Request for Creating Purchase Orders**

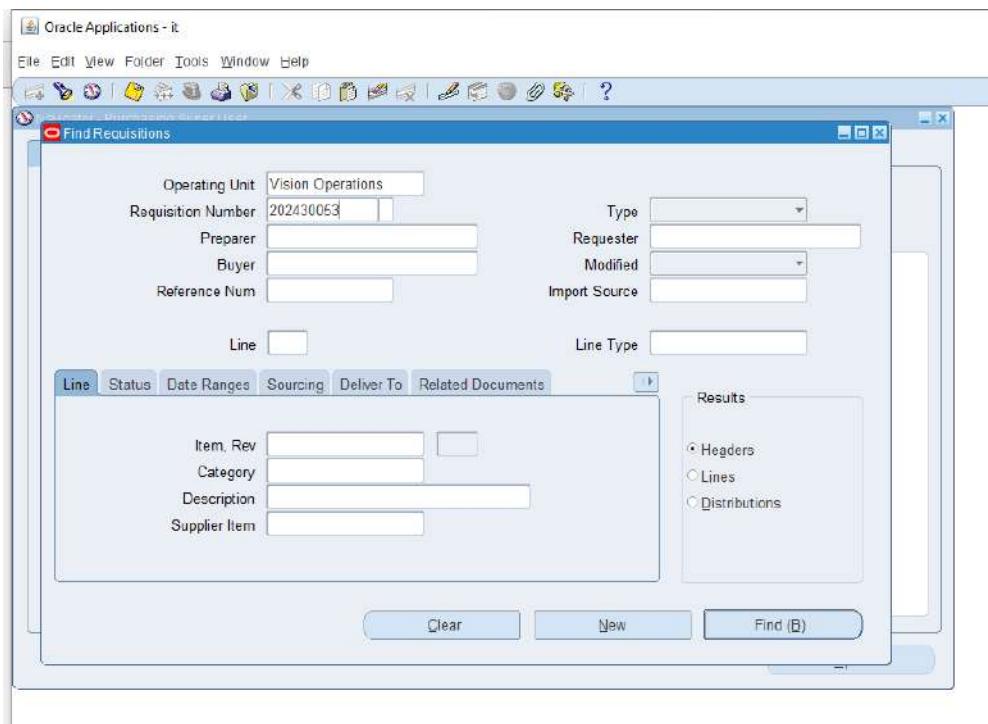
- From the Quick Requisition window.
  - Navigate to -> View -> Requests.
  - Click Submit a New Request.
  - Choose Create Standard Purchase Orders for the Request Name.
  - Click OK.
  - Confirm to submit the request.
  - Click Submit
  - Important:  
Do not submit any additional requests after this one.



## Step 4:

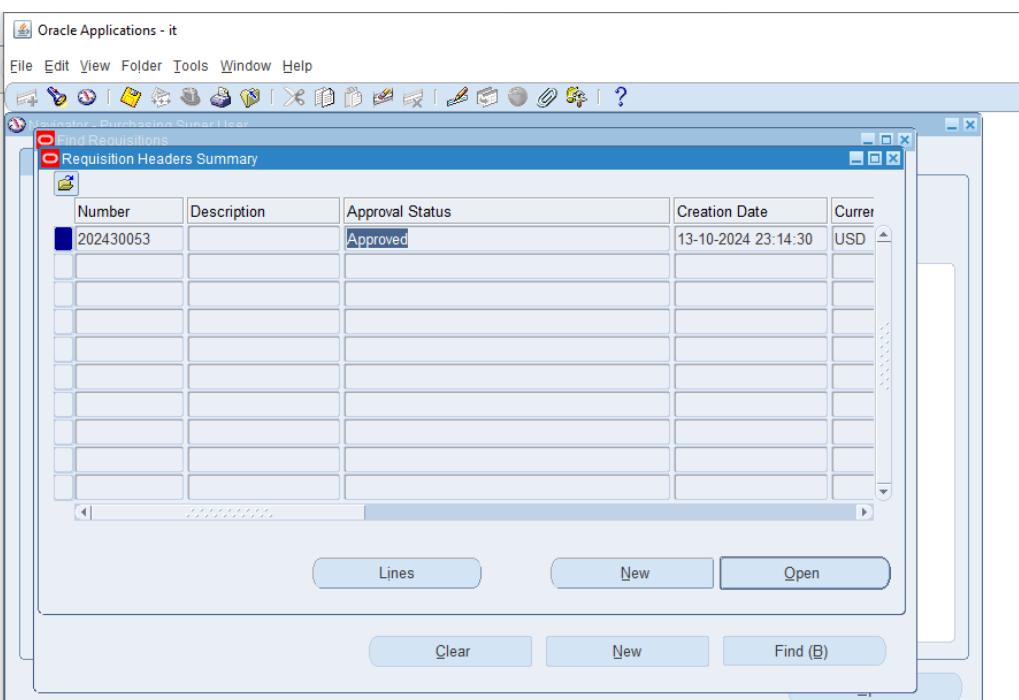
## Verifying Requisition and Purchase Order

- Sense the
- Navigate to Requisition Summary:
  - Navigate to -> Requisition -> Requisition Summary.
  - Find the Requisition.
  - In the Related Documents section, enter the requisition number 202430053 in the appropriate field.
  - Click on Find to search for the requisition.



## **Step 5:**

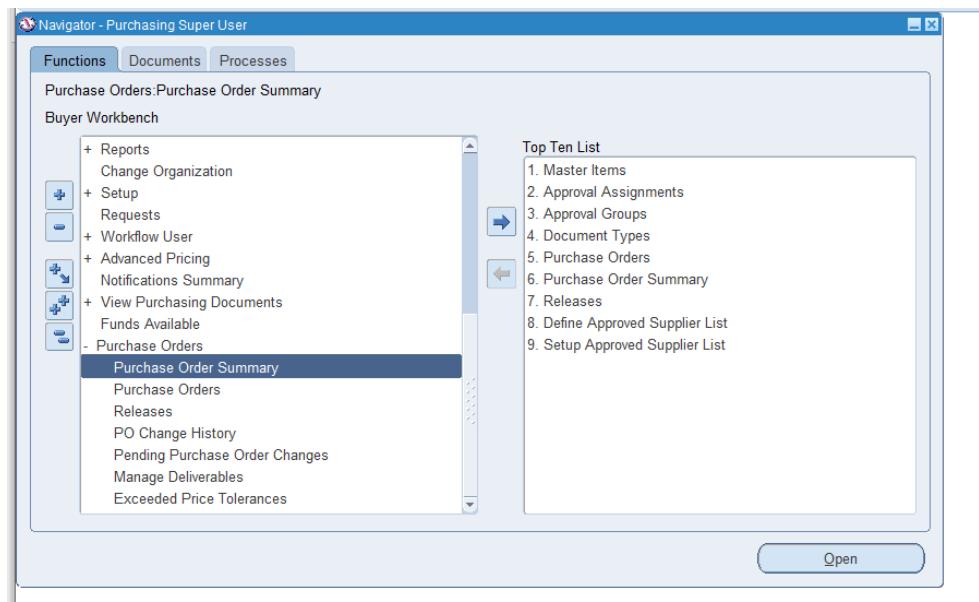
- Approval Status: is set to **Approved**.



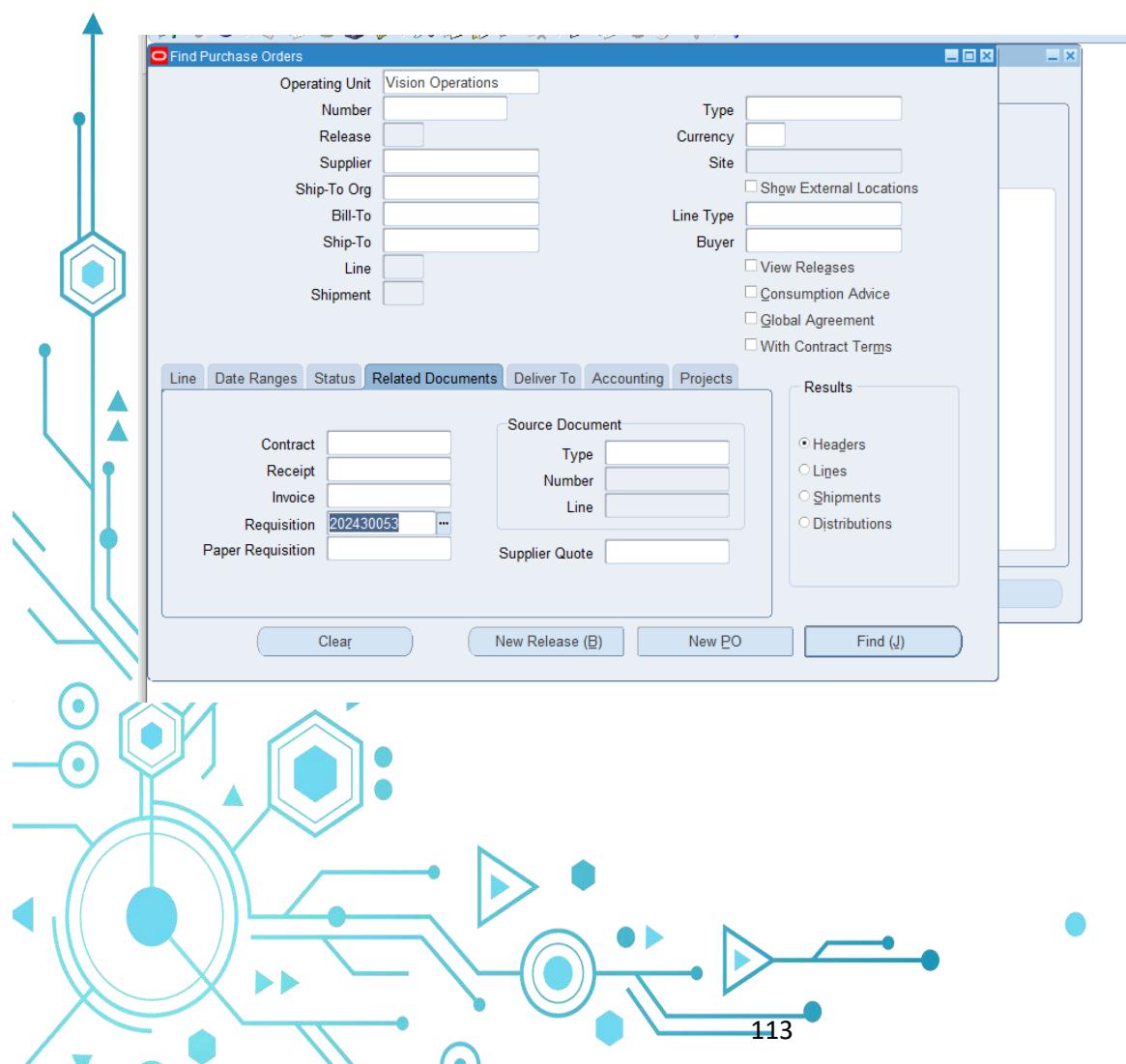
## Step 6:

Verify the purchase order creation:

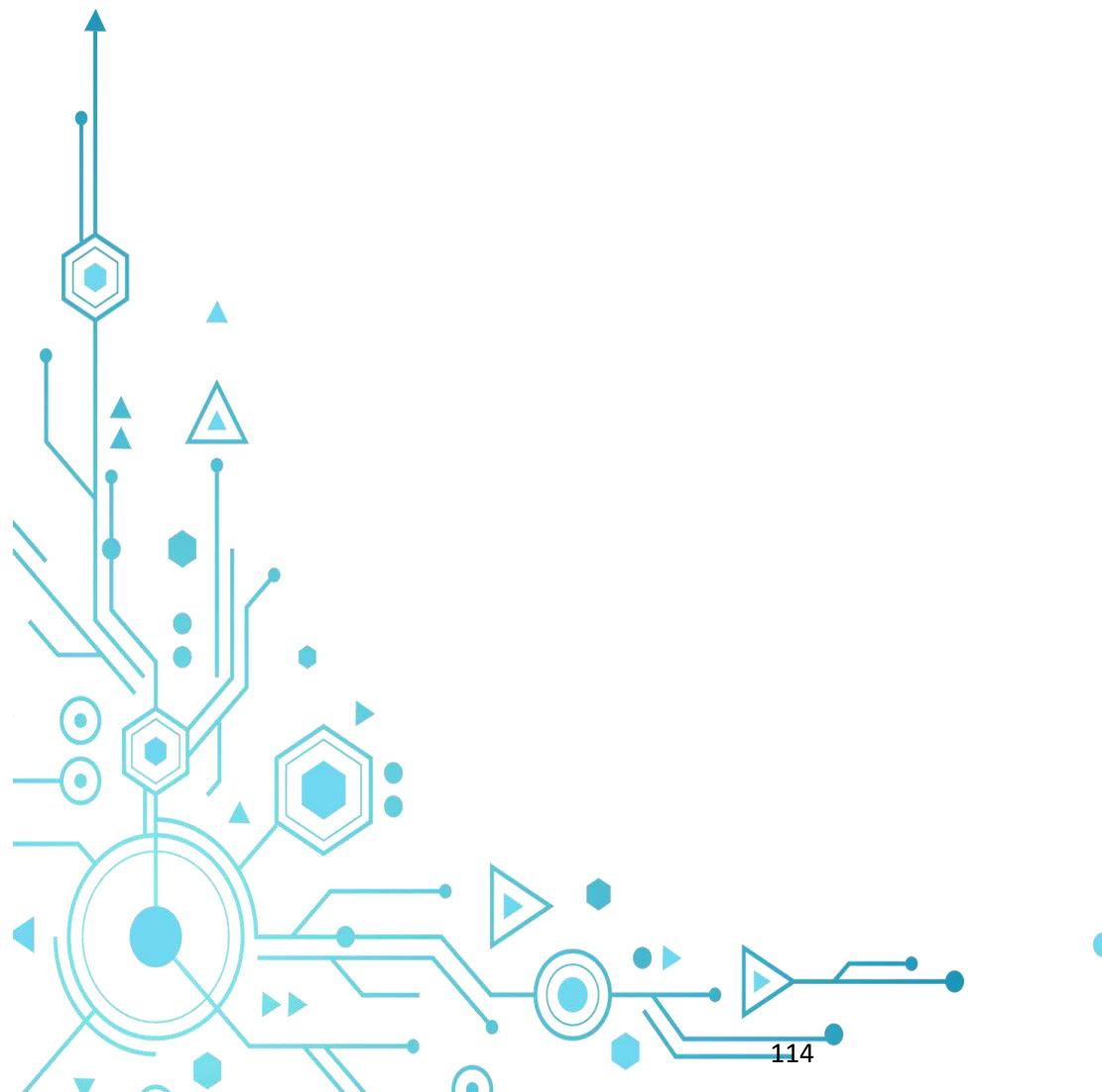
- Navigate to -> Purchase Orders -> Purchase Order Summary.



- In the Purchase Order Summary window.
- Enter 202430053 in the Requisition field.
- Click Find to initiate the search.



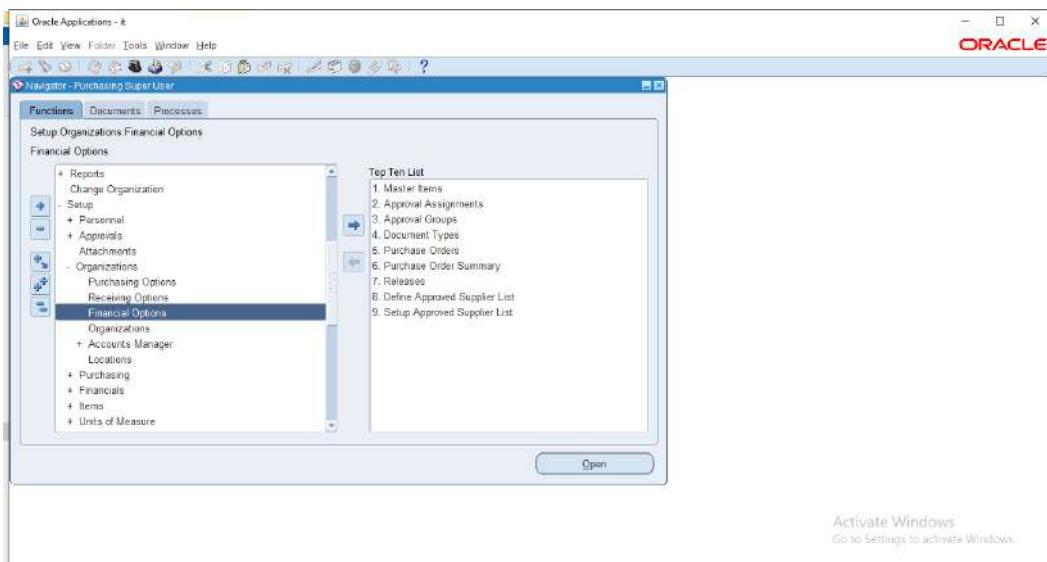
- Purchase Order Number: 202440061
  - PO Status: Approved



## 23. SUPERVISOR HIERARCHY

### Step 1:

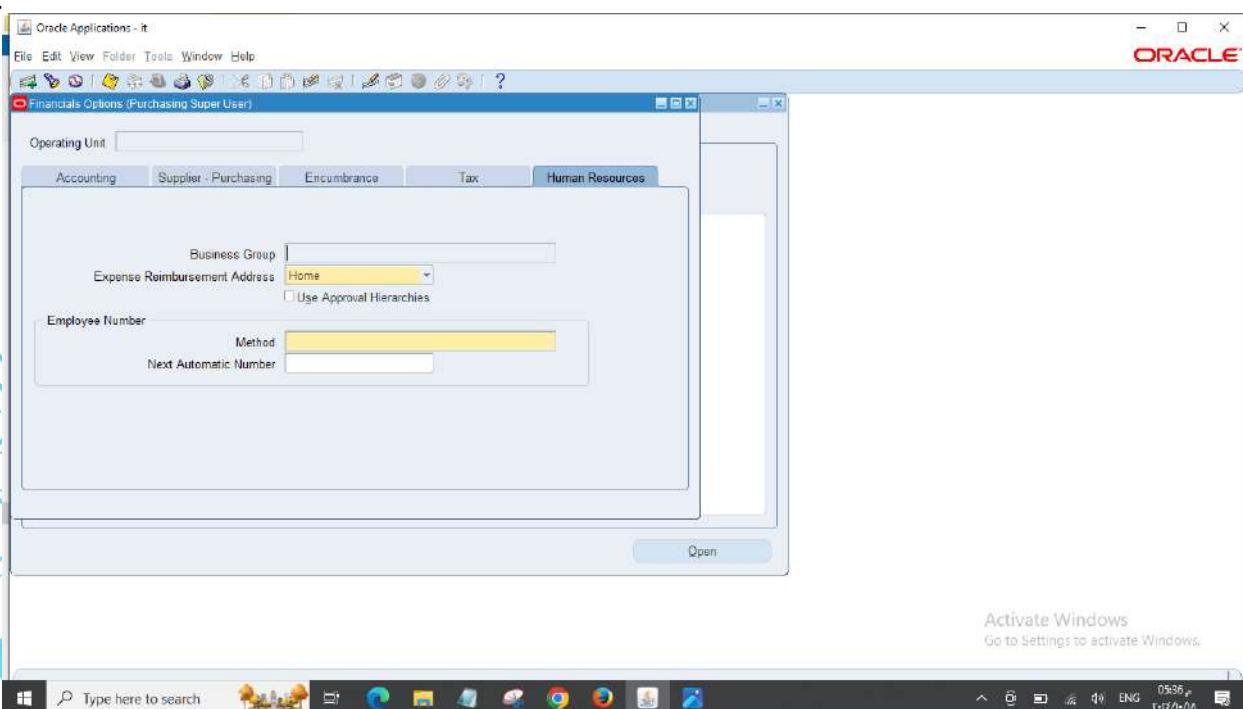
- Navigate to the Purchasing Responsibility.
- From the main menu, go to Setup.
- Then select Organizations.
- Finally, choose Financial Options.

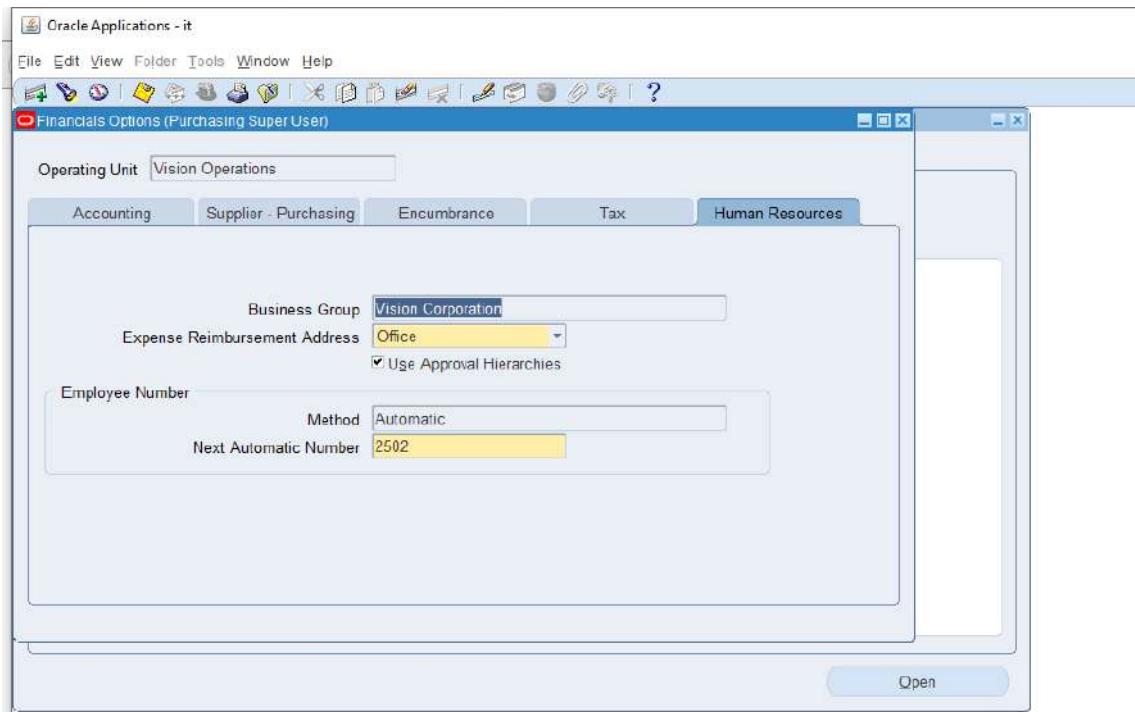


### Step 2:

To check the **Use Approval Hierarchies** setting in the Human Resources setup

- Navigate to the Human Resources Setup.
- Go to the Human Resources tab.
- Locate the Approval Hierarchies Setting.
- Look for the option labeled Use Approval Hierarchies.
- Ensure that this box is unchecked.

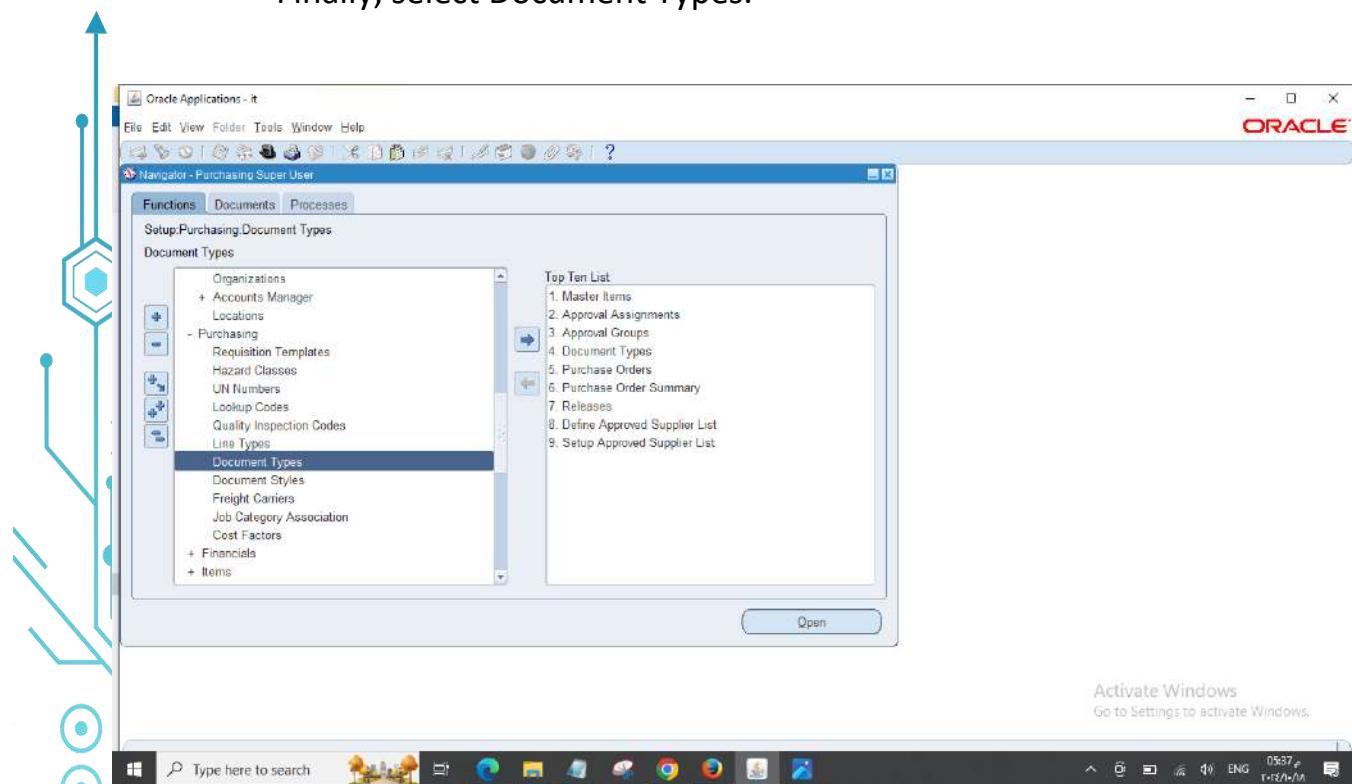




### Step 3:

Update Document Types in the Oracle system, follow these steps:

- Navigate to Document Types.
- Go to the menu and select Setup.
- From there, choose Purchasing.
- Finally, select Document Types.

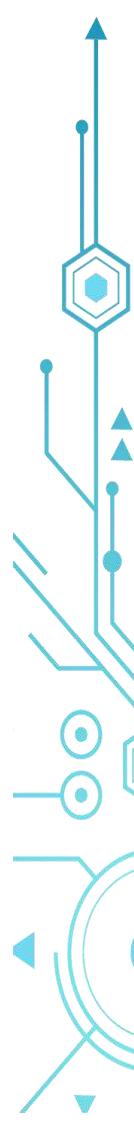


Activate Windows  
Go to Settings to activate Windows.

## Step 4:

Update the Requisition Purchase and Standard Purchase Orders document types

- Edit Document Type.
- For Requisition Purchase:  
Click on its icon in the Update column.
- Uncheck the Owner Can Approve option.
- Change the Forward Method to Direct.
- Click Apply to save changes



Update Document Type: Purchase Order Standard for Vision Operations

\* Indicates required field

Approval		Control	
<input type="checkbox"/> Owner Can Approve	<input checked="" type="checkbox"/> Approver Can Modify	Security Level: Public	Access Level: Full
<input checked="" type="checkbox"/> Can Change Forward-To		Archive On: Approve	
Approval Workflow: PO Approval	Workflow Start Process: PO Approval Top Process		
Approval Transaction Type: Forward Method	Direct	Direct	Hierarchy

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Activate Windows  
Go to Settings to activate Windows.

Privacy Statement



Update Document Type: Purchase Order Standard for Vision Operations

\* Indicates required field

Approval		Control	
<input checked="" type="checkbox"/> Owner Can Approve	<input checked="" type="checkbox"/> Approver Can Modify	Security Level: Public	Access Level: Full
<input checked="" type="checkbox"/> Can Change Forward-To		Archive On: Approve	
Approval Workflow: PO Approval	Workflow Start Process: PO Approval Top Process		
Approval Transaction Type: Forward Method	Hierarchy		

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Activate Windows  
Go to Settings to activate Windows.

Privacy Statement

## Step 5:

Modify the Requisition Purchase Document with the specified changes, follow these steps:

- Select Requisition Purchase Document

- Edit Document Type:

Click on the icon in the Update column for the Requisition Purchase document type.

- Uncheck the option Owner Can Approve.

- Change the Forward Method from Hierarchy to Direct.

- Apply Changes

**Update Document Type: Requisition Purchase for Vision Operations**

\* indicates required field

Document Name: Purchase Requisition

**Approval**

Owner Can Approve  
 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:

**Control**

Security Level: Public  
Access Level: Full  
Autocreate Workflow: PO Requisition Approval  
Autocreate Workflow Start Process: PO Requisition Approval

Use Contract Agreements for Auto-Sourcing  
 Include Non-Catalog Requests

**Spot Buy Options**

Spending Limit (USD):

Category	Threshold Limit (USD)	Delete
No results found		

Activate Windows  
Go to Settings to activate Windows.

**Update Document Type: Requisition Purchase for Vision Operations**

\* indicates required field

Document Name: Purchase Requisition

**Approval**

Owner Can Approve  
 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: Direct

**Control**

Security Level: Public  
Access Level: Full  
Autocreate Workflow: PO Requisition Approval  
Autocreate Workflow Start Process: PO Requisition Approval

Use Contract Agreements for Auto-Sourcing  
 Include Non-Catalog Requests

**Spot Buy Options**

Spending Limit (USD):

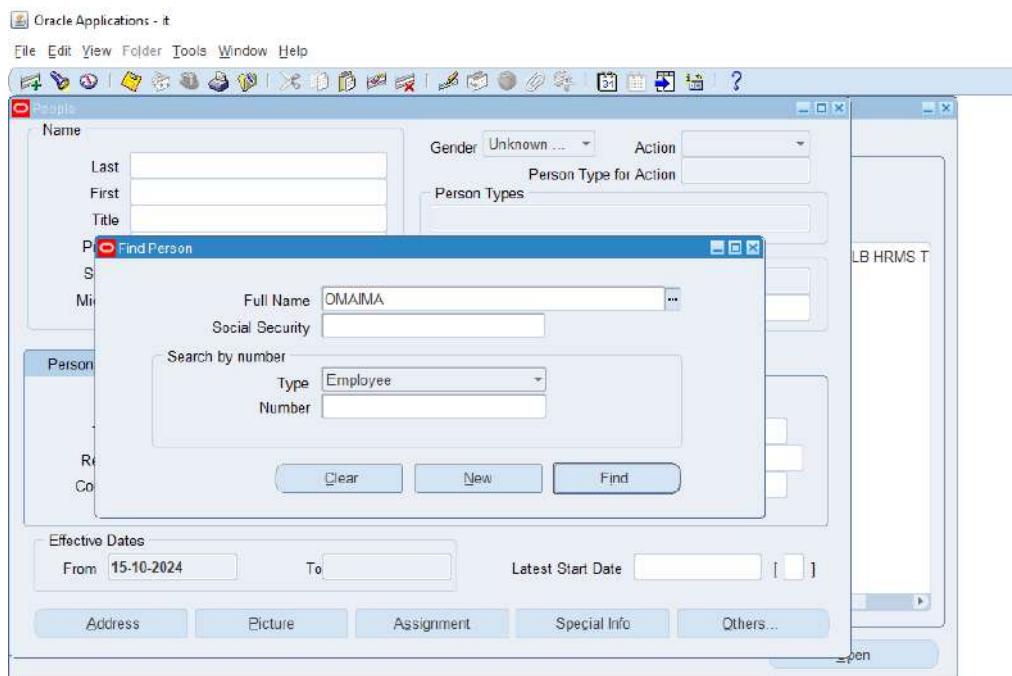
Category	Threshold Limit (USD)	Delete
No results found		

Activate Windows  
Go to Settings to activate Windows.

## Step 6:

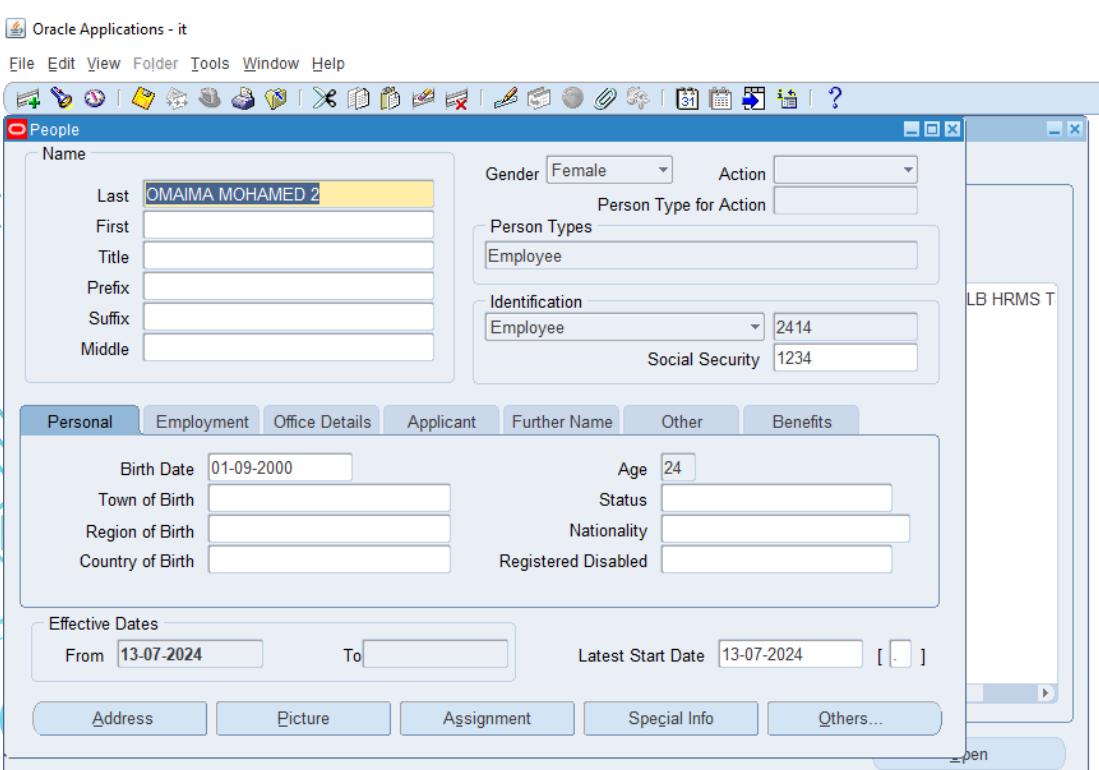
Assign a supervisor to the employee

- Navigate to Employee Management.
- Go to Global HRMS Responsibility > People > Enter & Maintain.
- Search for Employee:  
In the search window, enter the employee's full name (e.g., OMAIMA MOHAMED 2).
- Click Find to retrieve the employee's record.
- Select the Employee:
- Once you locate the employee in the search results, select their record.



The screenshot shows the Oracle Applications interface with the 'People' module selected. A 'Find Person' dialog box is open, displaying the search results for 'OMAIMA'. The 'Full Name' field is populated with 'OMAIMA'. Below the search results, there are tabs for 'Address', 'Picture', 'Assignment', 'Special Info', and 'Others...'. The main 'People' screen shows fields for 'Last', 'First', 'Title', 'Prefix', 'Suffix', and 'Middle' names, along with dropdowns for 'Gender', 'Action', and 'Person Type for Action'. There are also sections for 'Identification' (Employee ID: 2414, Social Security: 1234) and 'Effective Dates'.

- In the employee assignment screen, select the Supervisor tab.



The screenshot shows the Oracle Applications interface with the 'People' module selected. The 'Personal' tab is active. The 'Last' name field is highlighted with yellow, containing the value 'OMAIMA MOHAMED 2'. Other tabs include 'Employment', 'Office Details', 'Applicant', 'Further Name', 'Other', and 'Benefits'. The 'Identification' section shows 'Employee' as the type with ID '2414' and Social Security '1234'. The 'Personal' section includes fields for 'Birth Date' (01-09-2000), 'Age' (24), 'Status', 'Nationality', 'Town of Birth', 'Region of Birth', 'Country of Birth', and 'Effective Dates' (From: 13-07-2024, To: [empty], Latest Start Date: 13-07-2024). Buttons at the bottom include 'Address', 'Picture', 'Assignment', 'Special Info', and 'Others...'.

- Access Employee Assignment Screen.
- After finding and selecting the employee (e.g., OMAIMA MOHAMED 2), you should be in their assignment details.
- Save Changes.

Oracle Applications - it

File Edit View Folder Tools Window Help

People

Assignment(OMAIMA MOHAMED 2.)

Organization	Vision Operations	Group	.
Job	001.DEPI CEO	Position	Top Management.DEPI Chief Executive Office
Grade		Payroll	
Location	M1- Seattle Mfg	Status	Active Assignment
		Vacancy	
Assignment Number	2414	Collective Agreement	
Assignment Category		Employee Category	

Salary Information Supervisor Probation & Notice Period Standard Conditions Statutory Information

Name	Yusuf, Ms. Yousra
Worker Number	2401
Assignment Number	

Effective Dates

From 11-10-2024 To [ ]

Salary Entries Others...



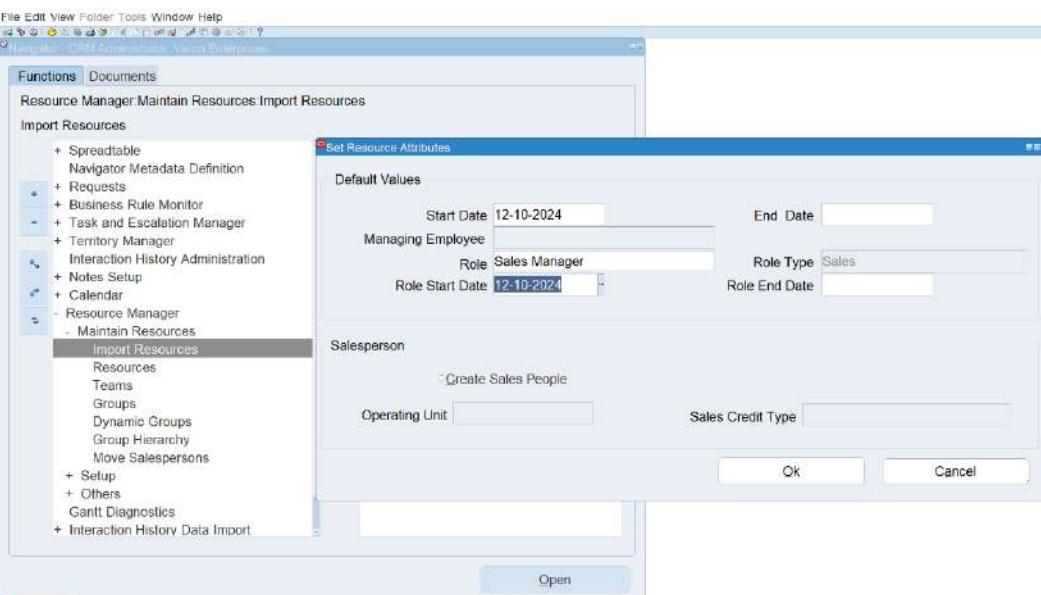
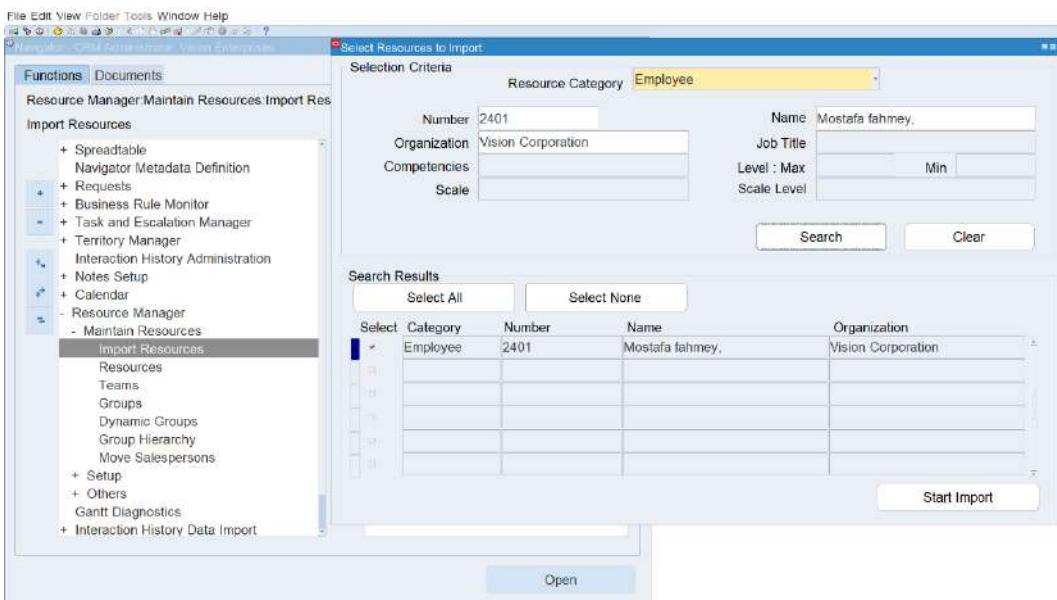
# III. ORDER MANAGEMENT



# 1. Sales person

## Step 1: Import sales person

- From CRM Administrator responsibility -> Maintain resource -> import resource
- Insert employee name -> then click Search -> then click start import
- Insert the start date and role then ok



- From review and import new resources window click save resources -> then Details

- Enter The employee details as a sales manager: Roles (role type, role) Receivable (number, sales credit type, date).

## 2. Create new customer

### Step 1: Create new customer organization

- Order management superuser -> Customers -> standard
- Enter the Customer Name - in the Organization Name field, Choose the Profile Class that applies to the customer, Account site address details

Home http://apps.example.com:8000/DA\_HTML/DA.jsp?page=/oracle/apps/ar/custstd/createcus/webui/ArcCreatePG&ln=12516174118&retainAM=Y&reddi= Google

ORACLE Trading Community Logged In As MOSTAFAA.FAHMEY

**Create Organization**

Customer Type: ORGANIZATION

**Customer Information**

\* Organization Name: Avengers Electronic  
 Alias:  
 Name Pronunciation:  
 D-U-N-S Number:  
 URL: Must include: https://  
 Context Value:  
 Line of Business of the Party:

**Account Information**

Account Description:  
 Profile Class: DEFAULT  
 Classification:  
 Account Type: External  
 Cust GL Class:  
 Tax Loc Code:  
 Sales Channel:  
 Reference:  
 Date Established: (27-09-2024)

Home http://apps.example.com:8000/DA\_HTML/DA.jsp?page=/oracle/apps/ar/custstd/createcus/webui/ArcCreatePG&ln=12516174118&retainAM=Y&reddi= Google

Cust Price Cls: Default  
 Customer Status: Default  
 Eliminations Dept:  
 Context Value:

**Account Site Address**

\* Country: Egypt  
 \* Address Line 1: CAIRO  
 Address Line 2:  
 Address Line 3:  
 Address Line 4:  
 City: cairo  
 County:  
 State:  
 Province:  
 Postal Code:  
 Address Description:  
 Global Location Number:  
 Identifying Address  
 Context Value:

**Account Site Details**

Operating Unit: Vision Operations  
 Category:  
 Territory:  
 Translation:  
 EDI Location:  
 Reference:  
 Status: Active

- Move to the bottom of the form and under Business Purposes - Choose Add Another Row. Set the purpose for the new row as 'Ship To' Choose the Save and Add Details

Account Site Details

Operating Unit	Vision Operations	Translation
Category		EDI Location
Territory		Reference

Status: Active

Context Value:

**Business Purposes**

Purpose	Location	Bill To Location	Primary	Remove	Record History
Bill To			<input type="checkbox"/>		
Ship To	(Site Bill-to)		<input type="checkbox"/>		

Additional Details:

Context Value:

Table Diagnostics

Diagnostic Console

Cancel | Save And Add Details | Apply

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About this Page | Privacy Statement

- enter customer details such as: name, status in simple search section

Customer Type: Organization

Search

Simple Search

Name: Avengers Electronic	Registry ID: <input type="text"/>
D-U-N-S Number: <input type="text"/>	Web Site: <input type="text"/>
Account Number: <input type="text"/>	Taxpayer ID: <input type="text"/>
Status: Active	<input type="button" value="Go"/> <input type="button" value="Clear"/>

Advanced Search

Create | ...

Name	Registry ID	D-U-N-S Number	Country	Primary URL	Status	Match (%)	Record History
Avengers Electronic	60725		Egypt		Active	100%	

Table Diagnostics

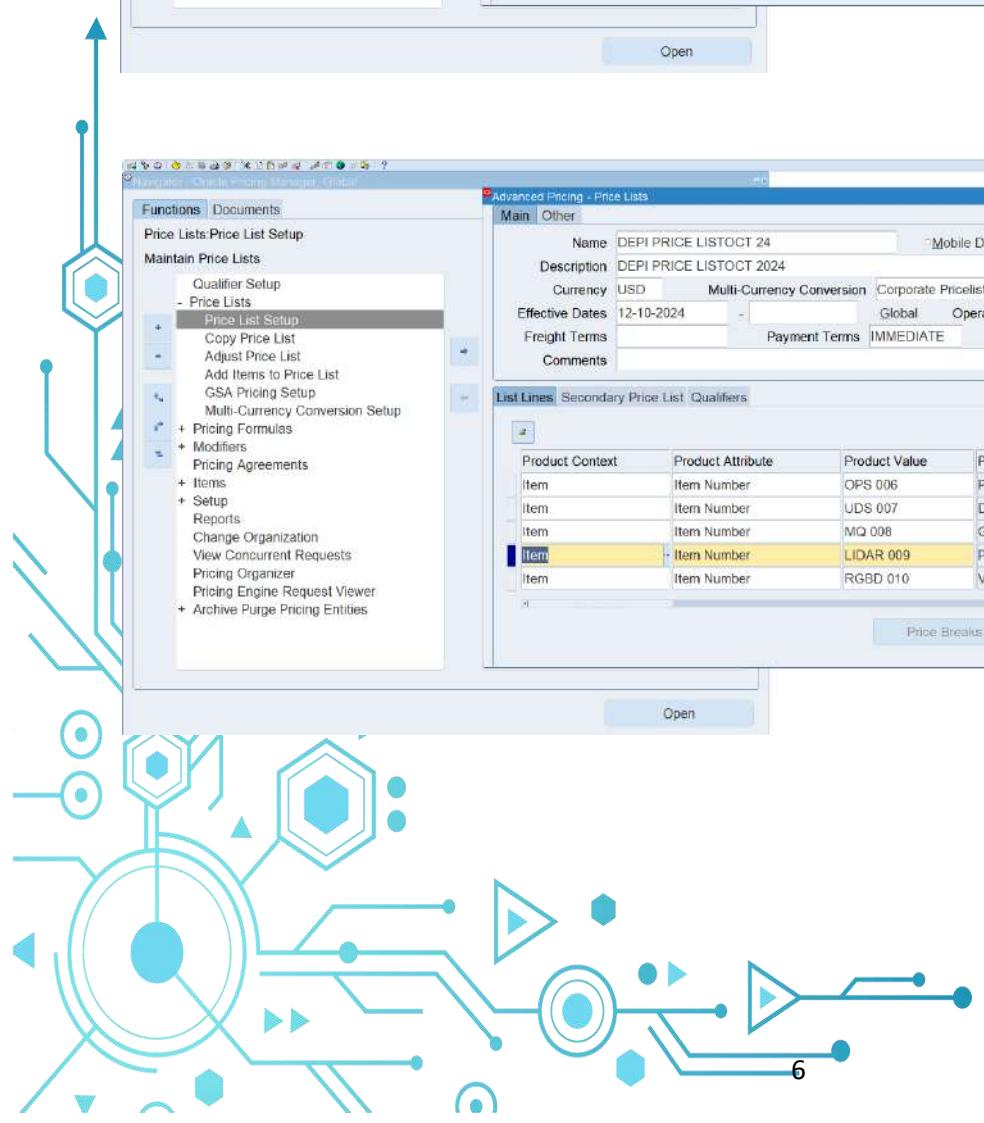
Accounts

Status: Active	<input type="button" value="Go"/>		
Create Account   ...			
Account Number: 11084	Account Description: DEFAULT	Profile Class: CAIRO, CAIRO, EGYPT	Primary Bill-To Address: Status Details Record History

### 3. Price list

#### Step 1:

- From Oracle pricing manager global responsibility -> price list -> price list set up
- Insert mandatory fields of the price list (name, currency, Ulti currency conversion, operating unit), mark Active Check box
- Select (product context, product Attribute)
- Insert item details (item number, description, UOM, Value)
- Then save



The screenshot shows two instances of the Oracle Advanced Pricing - Price Lists window. Both windows have the title bar "Advanced Pricing - Price Lists" and are in the "Main" tab.

**Top Window (Screenshot 1):**

Name	Mobile Download	Active
Description	Multi-Currency Conversion	Round To
Currency	USD	Global
Effective Dates	12-10-2024	Operating Unit
Freight Terms	Payment Terms	Freight Carriers
Comments		

**Bottom Window (Screenshot 2):**

Name	DEPI PRICE LIST OCT 24	Mobile Download	Active
Description	DEPI PRICE LIST OCT 2024	Corporate Pricelist Conv.	Round To -2
Currency	USD	Multi-Currency Conversion	Global
Effective Dates	12-10-2024	Operating Unit	Vision Operations
Freight Terms	Payment Terms	IMMEDIATE	Freight Carriers
Comments			

**Common Fields (Both Screenshots):**

**List Lines / Secondary Price List / Qualifiers:**

Product Context	Product Attribute	Product Value	Product Description
Item	Item Number	OPS 006	Proximity Sensors
Item	Item Number	UDS 007	Distance Sensors
Item	Item Number	MQ 008	Gas Sensors
Item	Item Number	LIDAR 009	Proximity and Distance Sensors
Item	Item Number	RGBD 010	Vision Sensors

Advanced Pricing - Price Lists

Main Other

List Source Document Number		List Source Code	QP																														
Pricing Transaction Entity	ORDFUL	System Source Code	QP																														
Sales Agreement		Customer Number																															
Customer		Shareable																															
<a href="#">List Lines</a> <a href="#">Secondary Price List</a> <a href="#">Qualifiers</a>																																	
<table border="1"> <thead> <tr> <th>Product Context</th> <th>Product Attribute</th> <th>Product Value</th> <th>Product Description</th> <th>U</th> </tr> </thead> <tbody> <tr><td>Item</td><td>Item Number</td><td>RTD 0001</td><td>Temperature Sensors</td><td>E</td></tr> <tr><td>Item</td><td>Item Number</td><td>CAPS 0002</td><td>Pressure Sensors</td><td>E</td></tr> <tr><td>Item</td><td>Item Number</td><td>THS 003</td><td>Humidity Sensors</td><td>E</td></tr> <tr><td>Item</td><td>Item Number</td><td>LDR 004</td><td>Light Sensors</td><td>E</td></tr> <tr><td>Item</td><td>Item Number</td><td>PIR 005</td><td>Motion Sensors</td><td>E</td></tr> </tbody> </table>				Product Context	Product Attribute	Product Value	Product Description	U	Item	Item Number	RTD 0001	Temperature Sensors	E	Item	Item Number	CAPS 0002	Pressure Sensors	E	Item	Item Number	THS 003	Humidity Sensors	E	Item	Item Number	LDR 004	Light Sensors	E	Item	Item Number	PIR 005	Motion Sensors	E
Product Context	Product Attribute	Product Value	Product Description	U																													
Item	Item Number	RTD 0001	Temperature Sensors	E																													
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Item	Item Number	THS 003	Humidity Sensors	E																													
Item	Item Number	LDR 004	Light Sensors	E																													
Item	Item Number	PIR 005	Motion Sensors	E																													
<a href="#">Price Breaks</a> <a href="#">Pricing Attributes</a>																																	

## Step 2:

- From other tab ensure the pricing transaction (ORDFUL) the system source code (QP) means it is for order management

### A. Copy price list

- From Oracle pricing manager global responsibility -> price list -> copy price list
- Insert price list name (copy from/copy to) then submit
- A concurrent request is created

Navigation: Oracle Pricing Manager - Global

Functions Documents

Price Lists: Copy Price List

Copy Price List

- Qualifier Setup
- Price Lists
  - Price List Setup
  - Copy Price List**
  - Adjust Price List
  - Add Items to Price List
  - GSA Pricing Setup
  - + Multi-Currency Conversion Setup
- + Pricing Formulas
- + Modifiers
- + Pricing Agreements
- + Items
- + Setup
- Reports
- Change Organization
- View Concurrent Requests
- Pricing Organizer
- Pricing Engine Request Viewer
- + Archive Purge Pricing Entities

Copy Price List

Copy From

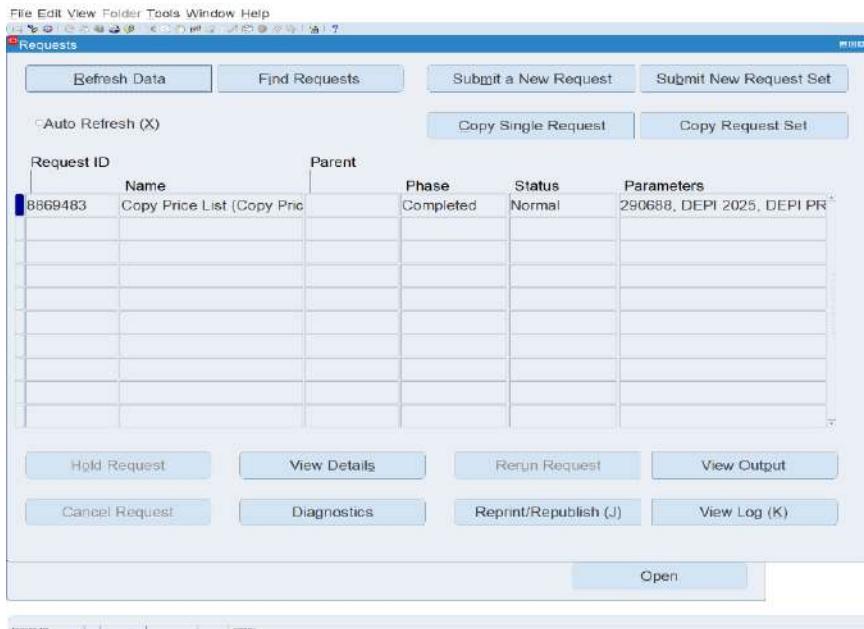
Price List	DEPI PRICE LIST OCT 24
Currency	USD
Description	DEPI PRICE LIST OCT 24
Items	
Item Category Set	
Item Category	
<input type="checkbox"/> Include Discounts <input type="checkbox"/> Retain Effective Dates	

Copy To

Price List	DEPI 2025
Description	DEPI PRICE LIST 2025
Effective Dates	<input type="checkbox"/> Global <input type="checkbox"/> Operating Unit
<input type="checkbox"/> Request ID <input type="checkbox"/> Submit	

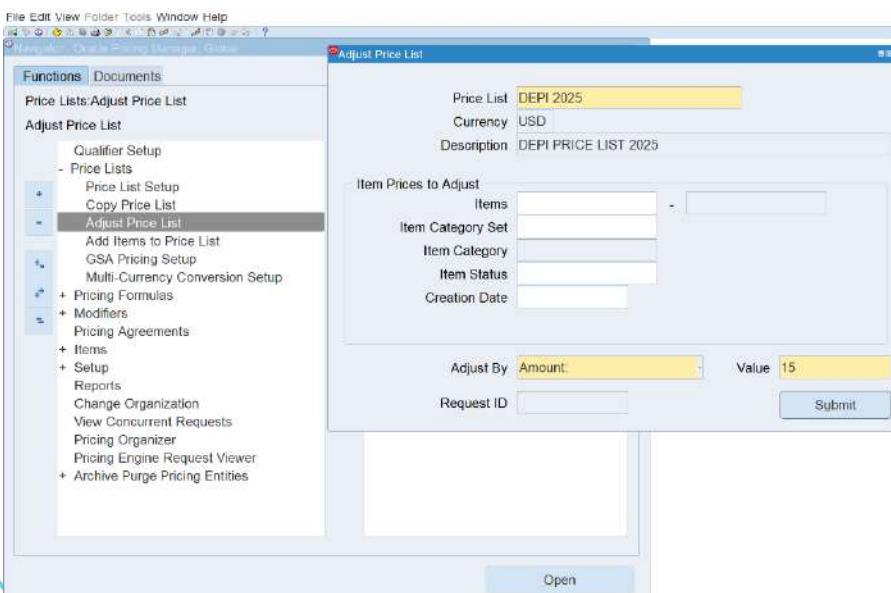
Open

- From view -> requests -> find: the request is completed normal

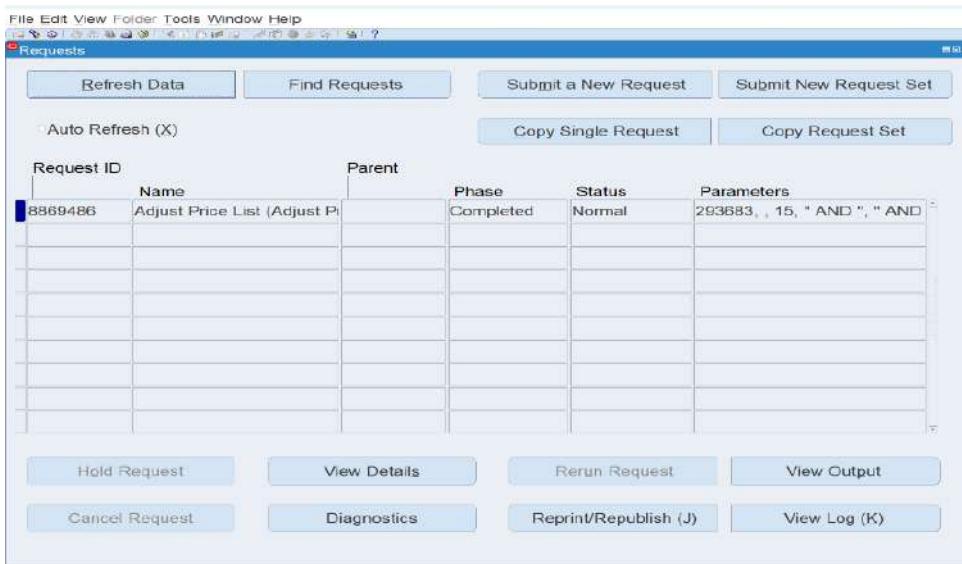


## B. Adjust price list

- From Oracle pricing manager global responsibility -> price list -> adjust price list
- Insert price list name then insert (adjust by and value) then submit
- A concurrent request is created (completed, normal)



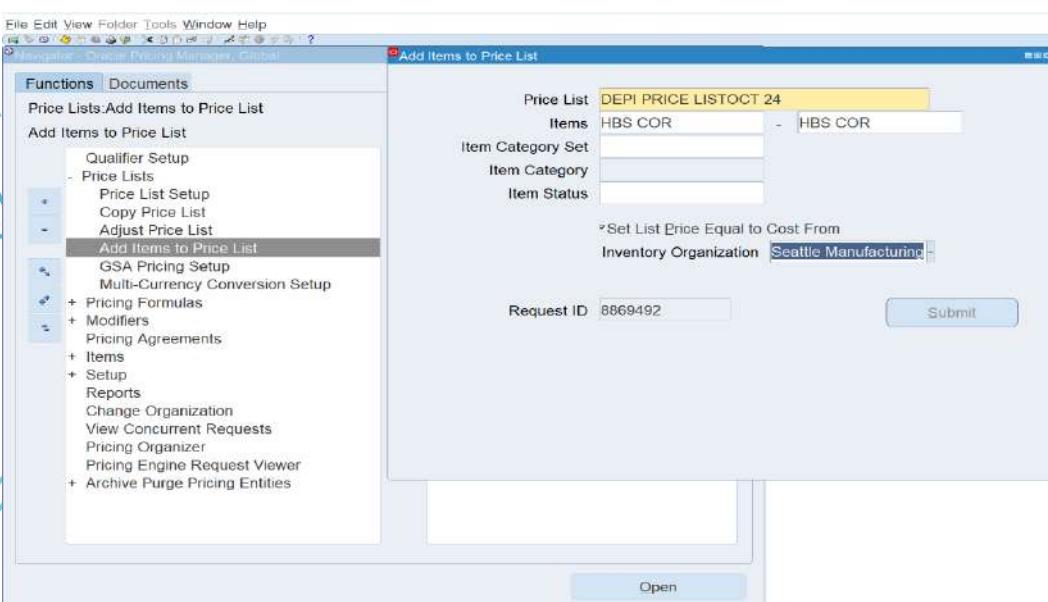
- The amount adjusted by (15) from 10 to 25



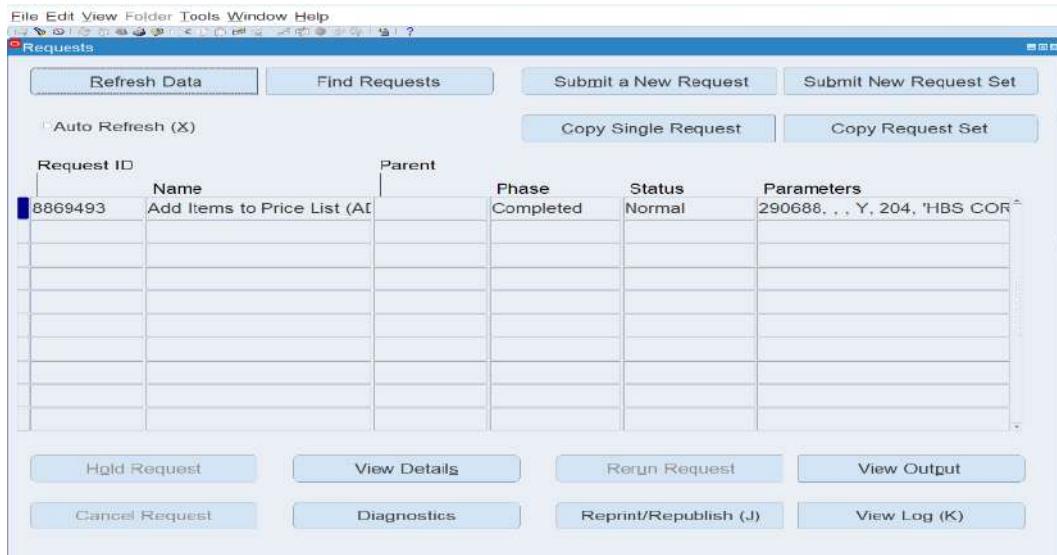
This screenshot shows the Oracle EPM Requests interface. At the top, there are buttons for Refresh Data, Find Requests, Submit a New Request, and Submit New Request Set. Below these are buttons for Auto Refresh (X), Copy Single Request, and Copy Request Set. The main area displays a table with columns: Request ID, Name, Parent, Phase, Status, and Parameters. A single row is selected, showing Request ID 8869486, Name 'Adjust Price List (Adjust P...', Parent blank, Phase Completed, Status Normal, and Parameters '293683, , 15, " AND ", " AND "'. Below the table are buttons for Hold Request, View Details, Rerun Request, View Output, Cancel Request, Diagnostics, Reprint/Republish (J), and View Log (K).

### C. Add item in price list

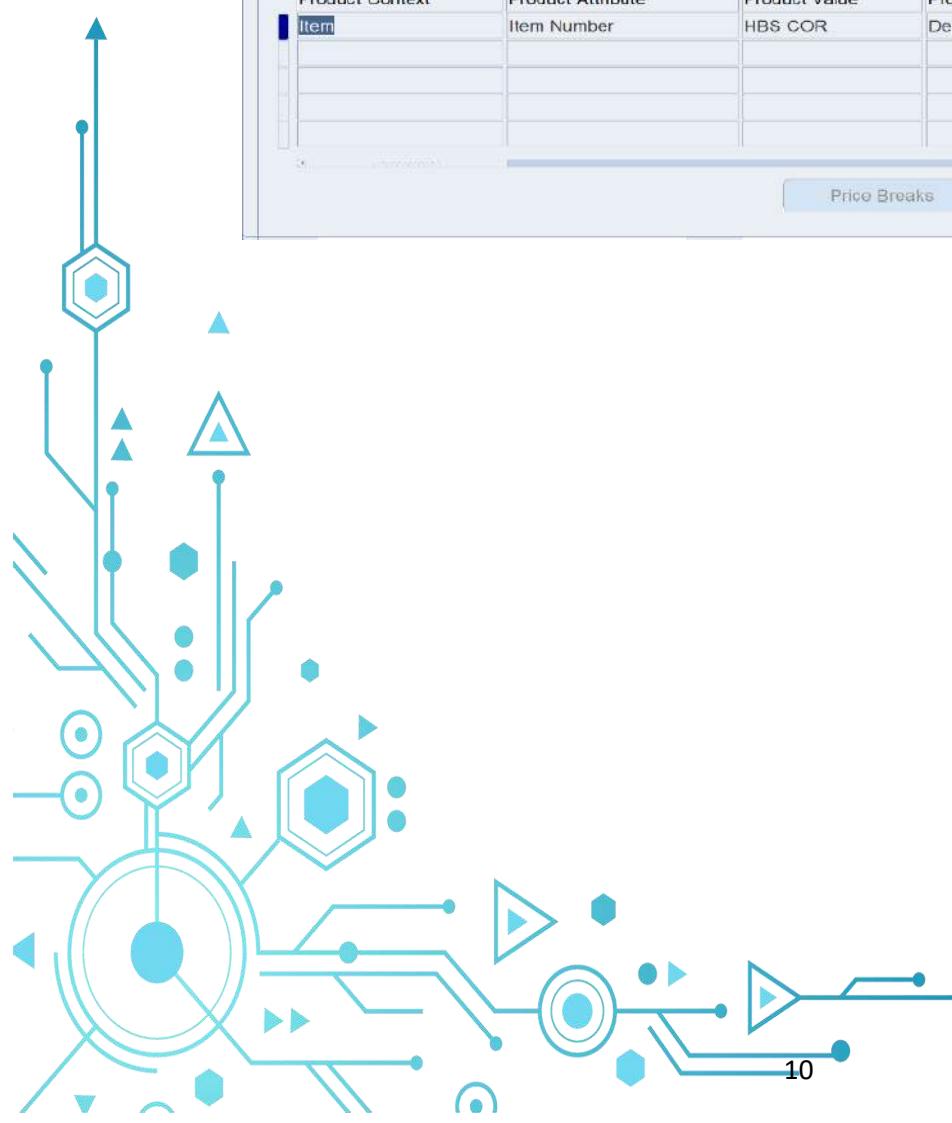
- From Oracle pricing manager global responsibility -> price list -> add item to price list
- Insert price list name then insert item name
- Select the inventory organization and mark the check box (set list price equal to cost form)
- Click submit
- A concurrent request is created (completed, normal)



This screenshot shows the Oracle EPM Pricing Manager interface. On the left, a navigation tree is open under 'Price Lists: Add Items to Price List'. The 'Add Items to Price List' node is selected. The main window title is 'Add Items to Price List'. It contains fields for 'Price List' (set to 'DEPI PRICE LIST OCT 24'), 'Items' (set to 'HBS COR'), 'Item Category Set', 'Item Category', and 'Item Status'. There is a checked checkbox for 'Set List Price Equal to Cost From' and a dropdown for 'Inventory Organization' set to 'Seattle Manufacturing'. At the bottom, there is a 'Request ID' field containing '8869492' and a 'Submit' button. A large decorative graphic of interconnected nodes and arrows surrounds the central window.



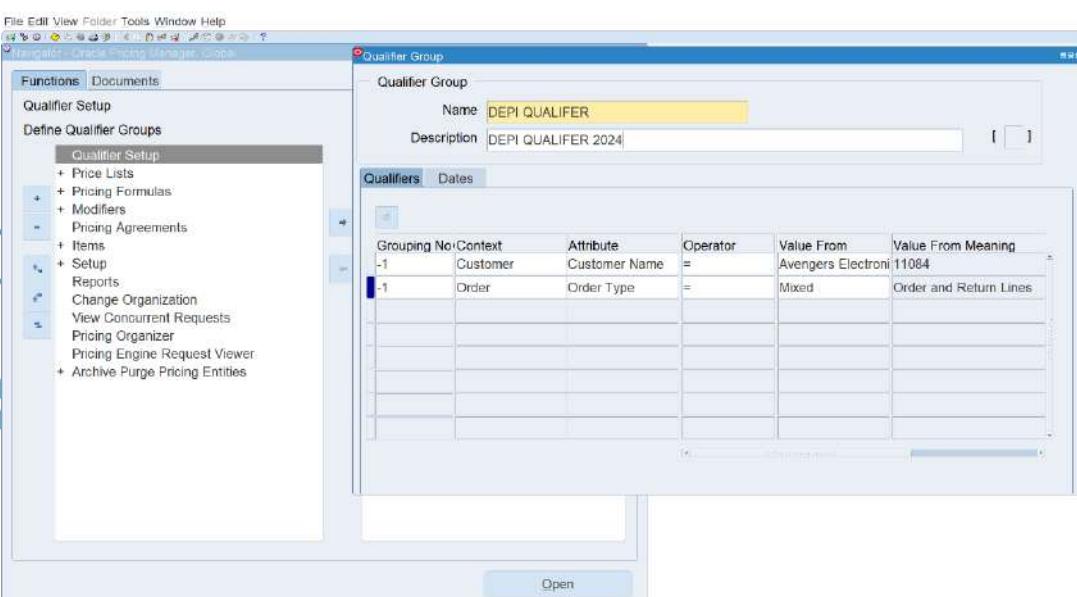
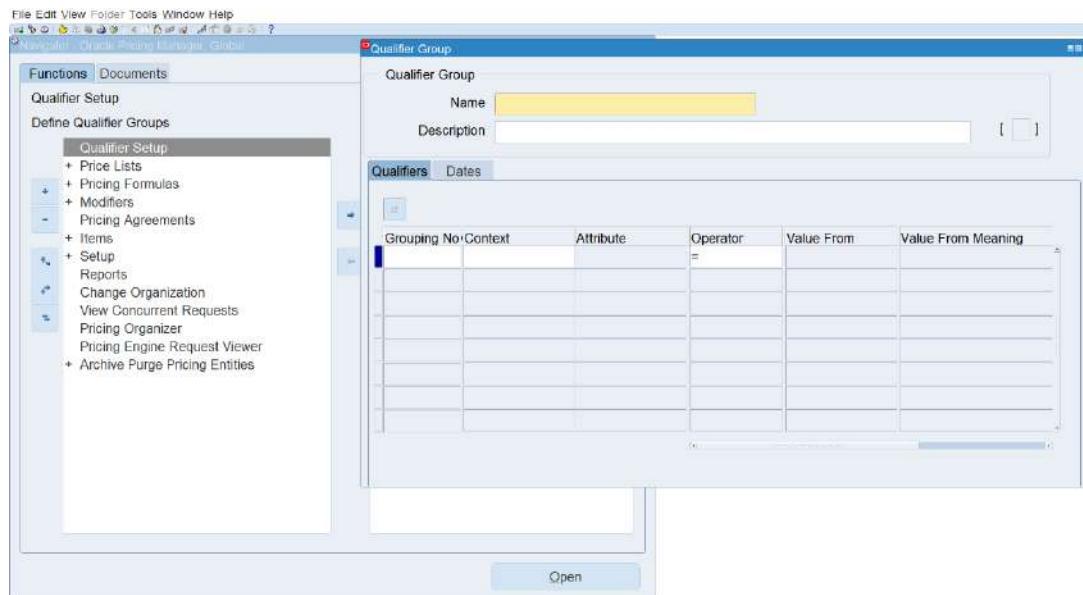
- The price list window shows the item is added



## 4. Modifier & Qualifier

### Step 1 :

- To specify a price list to (customer, sales order, order)
- Oracle pricing manager global (responsibility) -> qualifier set up (menu)
- Insert the name and description
- In grouping number (-1, -1) means logical gate (and), then the two condition in value form should be fulfilled



### Step 2: Identify discount types (5 types)

- Oracle pricing manager global (responsibility) -> Modifiers (menu)-> Modifier set up (sub menu)
- Insert modifier details in the header section such as (type, number, name, operating unit)
- Click save

- A modifier No will appear in details section, Select the remaining data according to business needs.
- In this case the discount amount is 5

**Advanced Pricing - Define Modifier**

Type: Discount List	Number: 2024	Active: <input checked="" type="checkbox"/>	Automatic: <input type="checkbox"/>																														
Name: DEPI MODIFIER	Global: <input checked="" type="checkbox"/>	Operating Unit: Vision Operations																															
Version:	Start Date: [ ]																																
Currency: USD	Description: DISCOUNT LIST	[ ]																															
<input type="button" value="List Limits"/> <input type="button" value="List Qualifiers"/>																																	
<input type="button" value="Modifiers Summary"/> <input type="button" value="Discounts/Charges"/> <input type="button" value="Promotion Upgrades"/> <input type="button" value="Promotion Terms"/> <input type="button" value="Coupons"/> <input type="button" value="Price Breaks"/>																																	
<table border="1"> <thead> <tr> <th>Modifier No</th> <th>Level</th> <th>Modifier Type</th> <th>Override</th> <th>Pricing Phase</th> <th>Incompatibility Group</th> </tr> </thead> <tbody> <tr> <td>321304</td> <td>Line</td> <td>Discount</td> <td></td> <td>List Line Adjustment</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Modifier No	Level	Modifier Type	Override	Pricing Phase	Incompatibility Group	321304	Line	Discount		List Line Adjustment																			
Modifier No	Level	Modifier Type	Override	Pricing Phase	Incompatibility Group																												
321304	Line	Discount		List Line Adjustment																													
<input type="button" value="Line Limits"/> <input type="button" value="Exclude"/> <input type="button" value="Pricing Attributes"/> <input type="button" value="Line Qualifiers"/> <input type="button" value="Define Details"/>																																	

**Open**

**Advanced Pricing - Define Modifier**

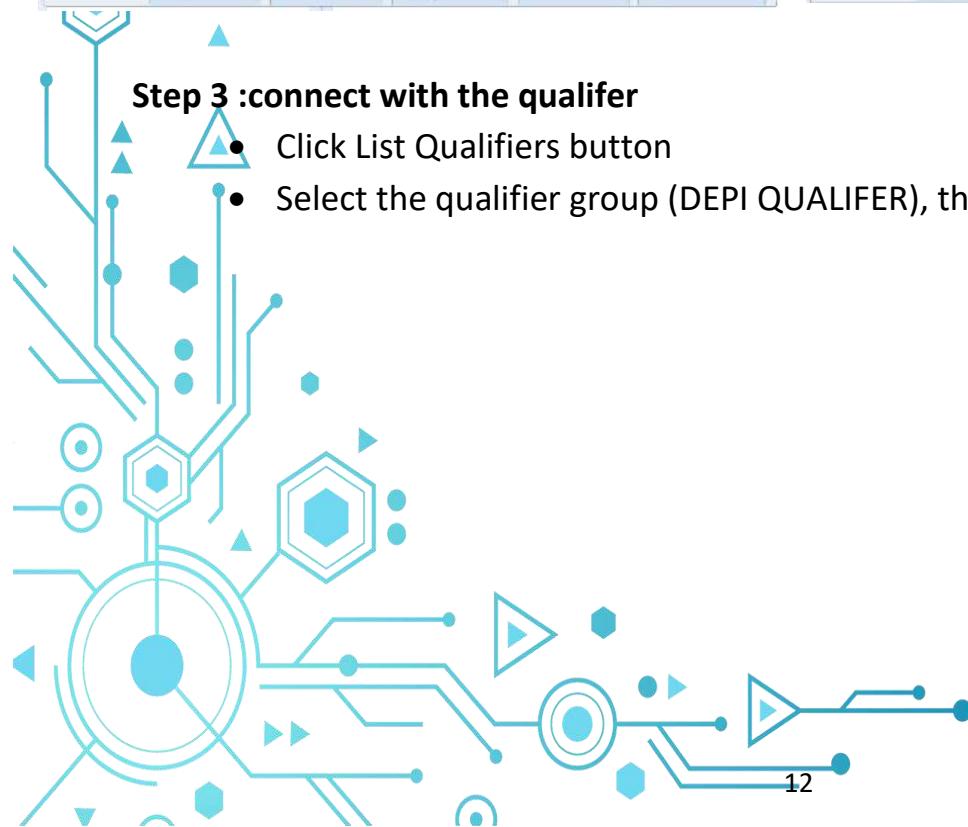
Type: Discount List	Number: 2024	Active: <input checked="" type="checkbox"/>	Automatic: <input type="checkbox"/>																																			
Name: DEPI MODIFIER	Global: <input checked="" type="checkbox"/>	Operating Unit: Vision Operations																																				
Version:	Start Date: [ ]																																					
Currency: USD	Description: DISCOUNT LIST	[ ]																																				
<input type="button" value="List Limits"/> <input type="button" value="List Qualifiers"/>																																						
<input type="button" value="Modifiers Summary"/> <input type="button" value="Discounts/Charges"/> <input type="button" value="Promotion Upgrades"/> <input type="button" value="Promotion Terms"/> <input type="button" value="Coupons"/> <input type="button" value="Price Breaks"/>																																						
<table border="1"> <thead> <tr> <th>Modifier No</th> <th>Level</th> <th>Modifier Type</th> <th>Start Date</th> <th>End Date</th> <th>Automatic</th> <th>Override</th> </tr> </thead> <tbody> <tr> <td>321304</td> <td>Line</td> <td>Discount</td> <td>13-10-2024</td> <td>15-10-2024</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Modifier No	Level	Modifier Type	Start Date	End Date	Automatic	Override	321304	Line	Discount	13-10-2024	15-10-2024																							
Modifier No	Level	Modifier Type	Start Date	End Date	Automatic	Override																																
321304	Line	Discount	13-10-2024	15-10-2024																																		
<input type="button" value="Line Limits"/> <input type="button" value="Exclude"/> <input type="button" value="Pricing Attributes"/> <input type="button" value="Line Qualifiers"/> <input type="button" value="Define Details"/>																																						

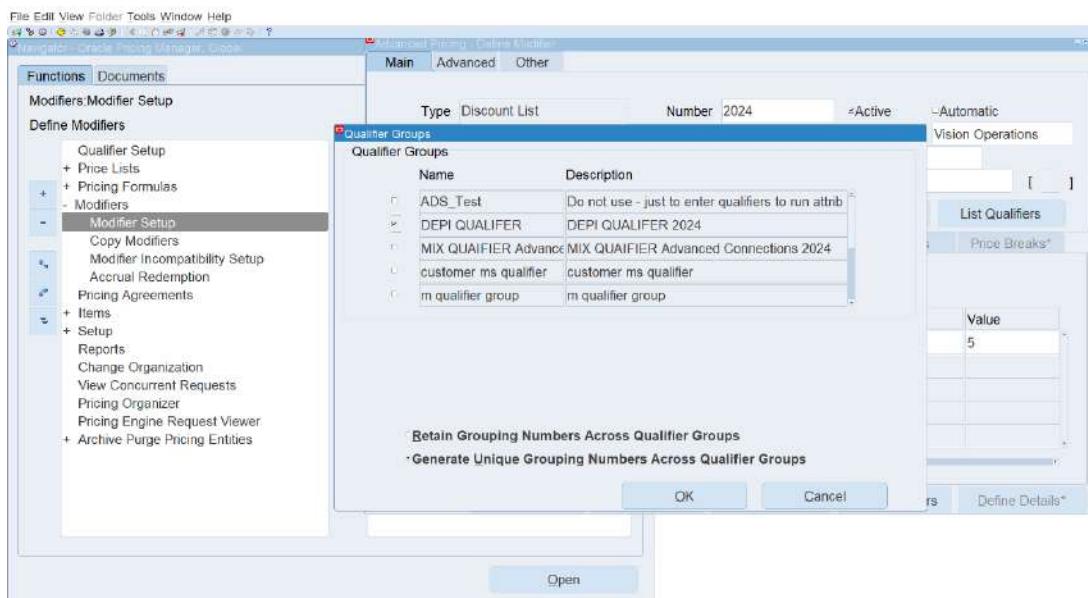
**Advanced Pricing - Define Modifier**

Type: Discount List	Number: 2024	Active: <input checked="" type="checkbox"/>	Automatic: <input type="checkbox"/>																																			
Name: DEPI MODIFIER	Global: <input checked="" type="checkbox"/>	Operating Unit: Vision Operations																																				
Version:	Start Date: [ ]																																					
Currency: USD	Description: DISCOUNT LIST	[ ]																																				
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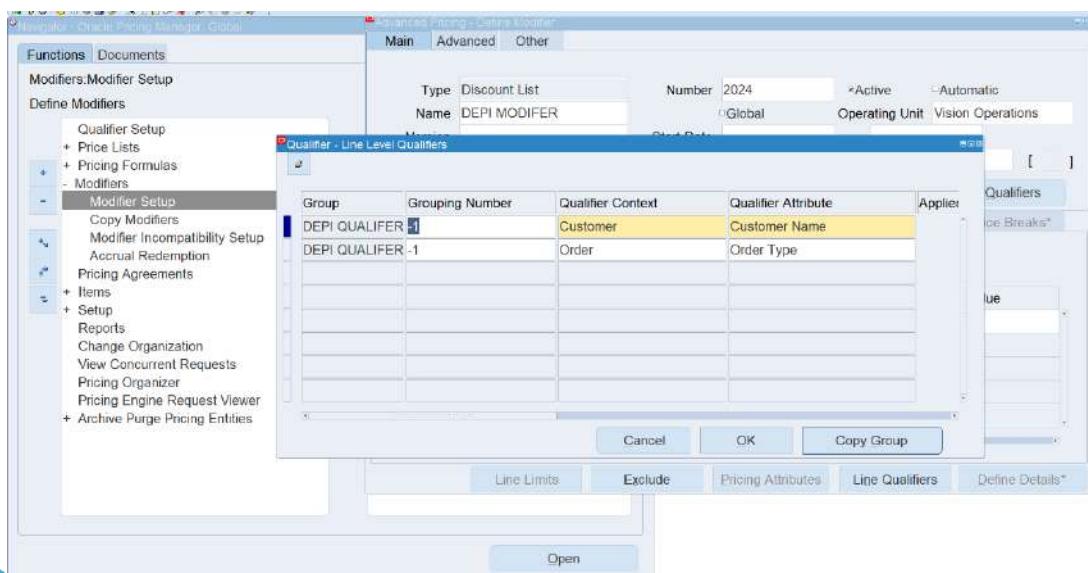
### Step 3 :connect with the qualifier

- Click List Qualifiers button
- Select the qualifier group (DEPI QUALIFER), then OK





- Insert the conditions then save



#### step 4: Review the discount (proof of concept)

- From Oracle management super user (responsibility) -> orders, returns (menu) -> sales order (sub menu)
- Create sales order the, then click action the view tha discount
- Click apply, the selling price decreased from 20 to 15 by (5)

Sales Orders (Vision Operations) - 69365, Avengers Electronic

**Order Information**

Line	Ordered Item	Qty
1.1	CAPS 0002	1

Line Total: 20.00 Description: Pressure Sensors

**Line Items**

Main	Pricing	Shipping	Address
Line 1	Item CAPS 0002	Description Pressure Sensors	Qty 1 UOM Ea List Price 20.00 Selling Price 20.00

**Adjustments - Mixed, 69365**

Line	Line 1	Item	Description	Qty	UOM	List Price	Selling Price
1.1	CAPS 0002	CAPS 0002	Pressure Sensors	1	Ea	20.00	20.00

**Adjustments**

Level	Modifier Number	Name	Type	List Line	Rate	Amount Reduced
Line	2024	-DEPI MODIFIER	Discount	321304	5	5

Description: DISCOUNT LIST Effective Date:

Cancel Attributes Related Details Apply

Sales Orders (Vision Operations) - 69365, Avengers Electronic

**Order Information**

Main	Pricing	Shipping	Addresses	Returns	Services	Others
Line 1.1	Ordered Item CAPS 0002 Qty 1 UOM Ea Unit Selling Price 15.00 Request Date 13-10-2024 13:06:52 Schedule Ship Date 31-12-2020 23:59:00 Service Total 0.00					

Line Total: 15.00 Line Qty: 1 Service Total: 0.00 Description: Pressure Sensors

**Actions**

## 5. Copy Modifiers

- From Oracle pricing manager global responsibility -> Modifiers -> copy modifiers
- Insert modifiers number (copy from/copy to) then submit
- A concurrent request is created

File Edit View Folder Tools Window Help

Copy Modifiers

**Functions**

- Modifiers:Copy Modifiers
- Copy Modifiers
  - + Price Lists
  - + Pricing Formulas
  - Modifiers
    - Modifier Setup
    - Copy Modifiers
    - Modifier Incompatibility Setup
    - Accrual Redemption
    - Pricing Agreements
    - + Items
    - + Setup
    - Reports
    - Change Organization
    - View Concurrent Requests
    - Pricing Organizer
    - Pricing Engine Request Viewer
    - + Archive/Purge Pricing Entities

**Copy From**

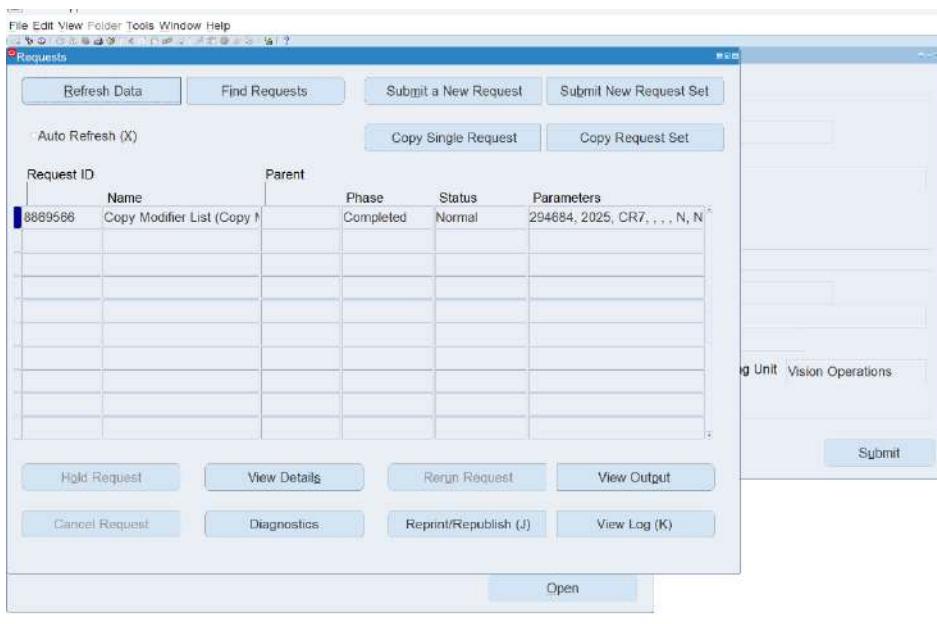
Number	2024
Currency	USD
Name	DEPI MODIFIER
Retain Effective Dates	

**Copy To**

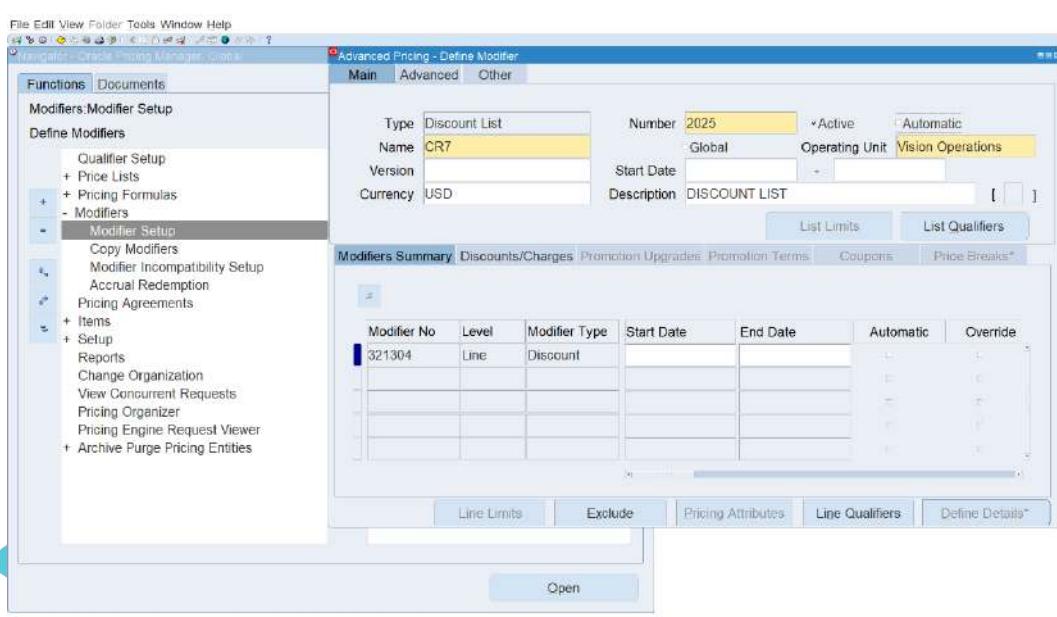
Number	2025
Name	CR7
Effective Dates	Global
Operating Unit: Vision Operations	

Request ID: Submit Open

- From view -> requests -> find: the request is completed normal



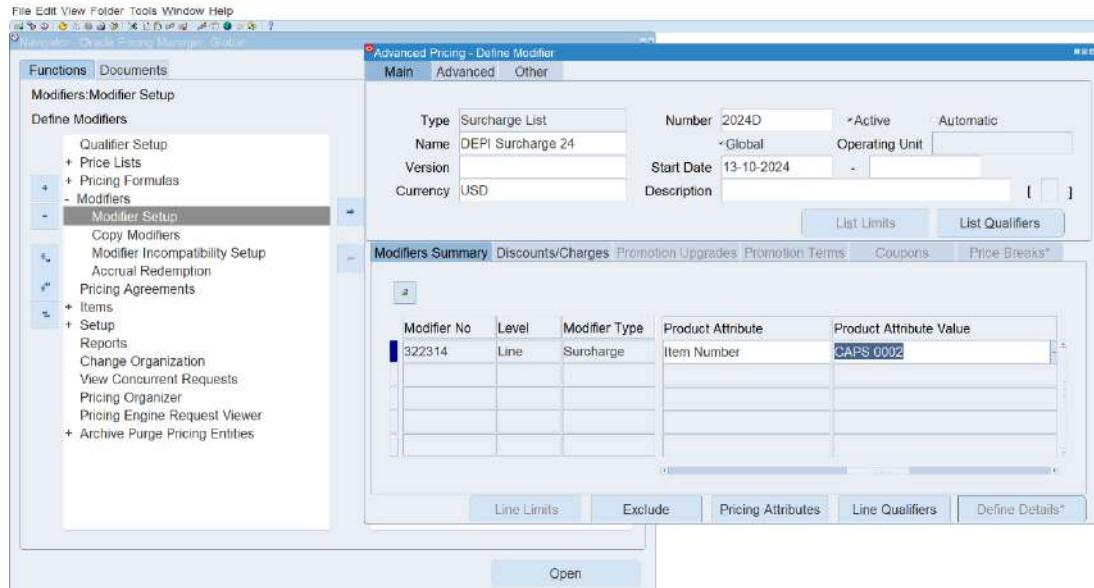
- define modifier window shows that the list (2025) is copied



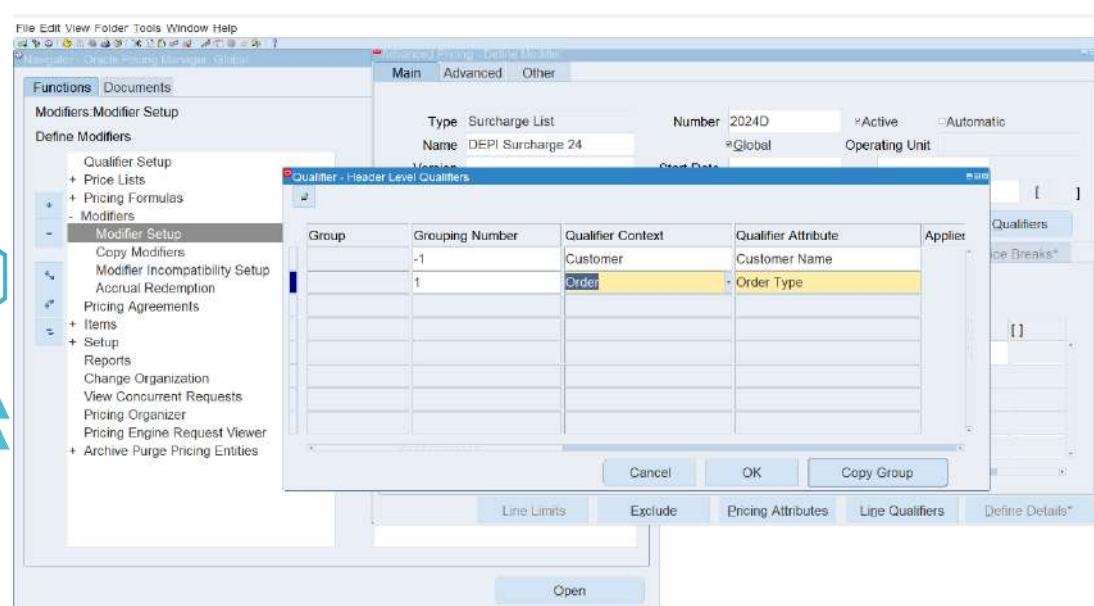
## 6. Surcharges

To add charges after discount

- oracle pricing manager global (responsibility) ->Modifiers (menu)-> Modifier set up (sub menu)
- in type field select: surcharge, then the remaining data, then save



- Click list qualifier
- Insert the conditions (1, -1) means (or), then save

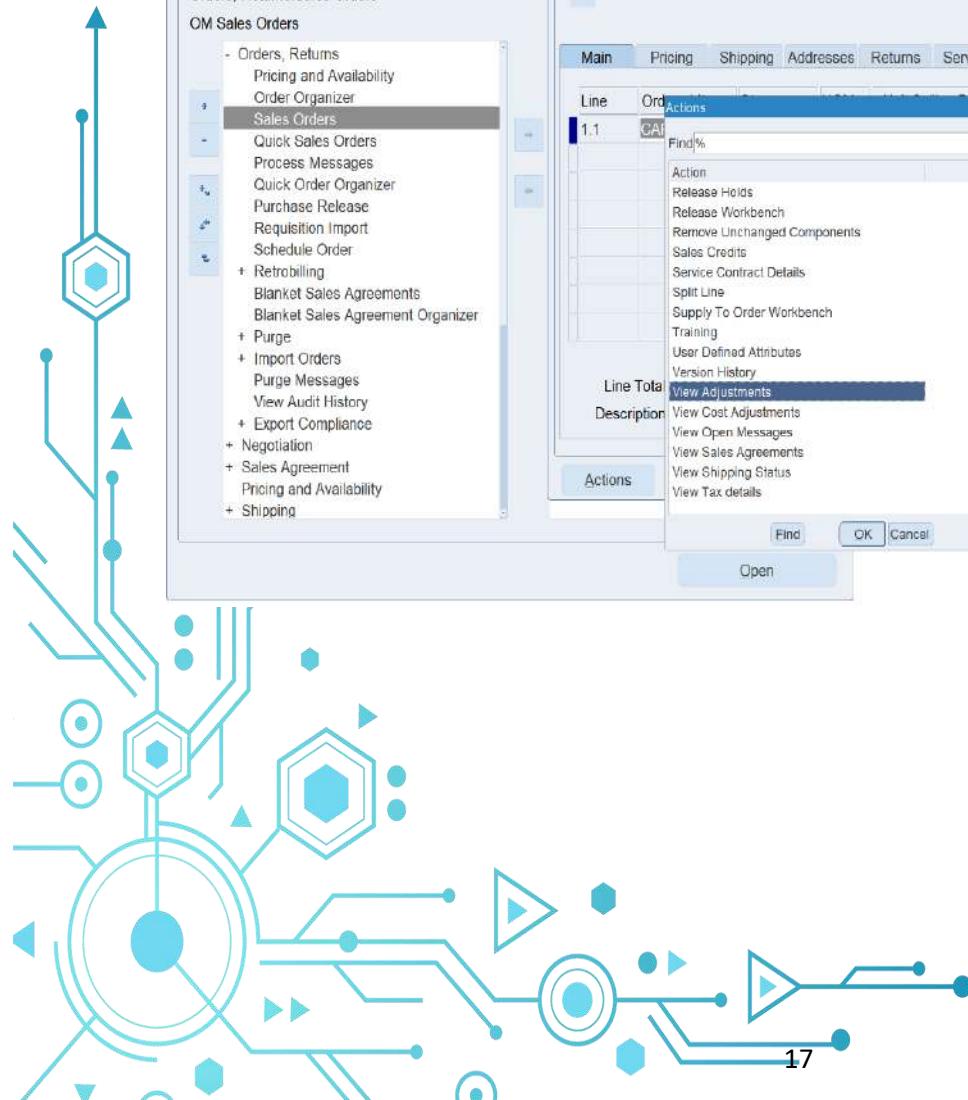


### POC (Proof of concept)

- From Oracle management super user (responsibility) -> orders, returns (menu) -> sales order (sub menu)
- Create sales order the, then click book order
- Click action -> view adjustment
- Click apply, the selling price changed from 20 to 27

The screenshot shows the NetSuite interface for managing sales orders. The top navigation bar includes File, Edit, View, Folder, Tools, Window, and Help. The main title is "Sales Orders (Vision Operations) - 60366, Avengers Electronic". On the left, a sidebar titled "Functions Documents Processes" lists "Orders, Returns/Sales Orders" and "OM Sales Orders". Under "OM Sales Orders", "Sales Orders" is selected and highlighted. A detailed list of sales order management features follows, categorized by plus signs: Quick Sales Orders, Process Messages, Click Order Organizer, Purchase Release, Requisition Import, Schedule Order, Retробilling, Blanket Sales Agreements, Blanket Sales Agreement Organizer, Purge, Import Orders, Purge Messages, View Audit History, Export Compliance, Negotiation, Sales Agreement, Pricing and Availability, and Shipping. The main workspace displays the "Line Items" tab of the sales order. The table has columns for Line, Ordered Item, Qty, UOM, Unit Selling Price, Request Date, Schedule Ship Date, and \$ (Total). One line item is listed: Line 1.1, Ordered Item CAPS 0002, Qty 10, UOM Ea, Unit Selling Price 20.00, Request Date 13-10-2024 14:32:27, Schedule Ship Date 31-12-2020 23:59:00, and Total \$200.00. Below the table, summary fields show Line Total 200.00, Line Qty 10, Service Total 0.00, and Description Pressure Sensors. Action buttons at the bottom include Actions, Related Items, Configurator, Availability, Book Order, and Open.

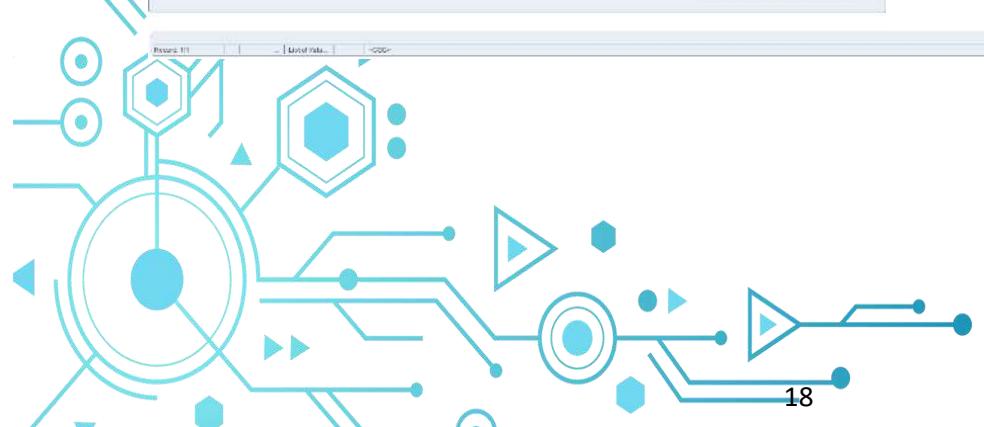
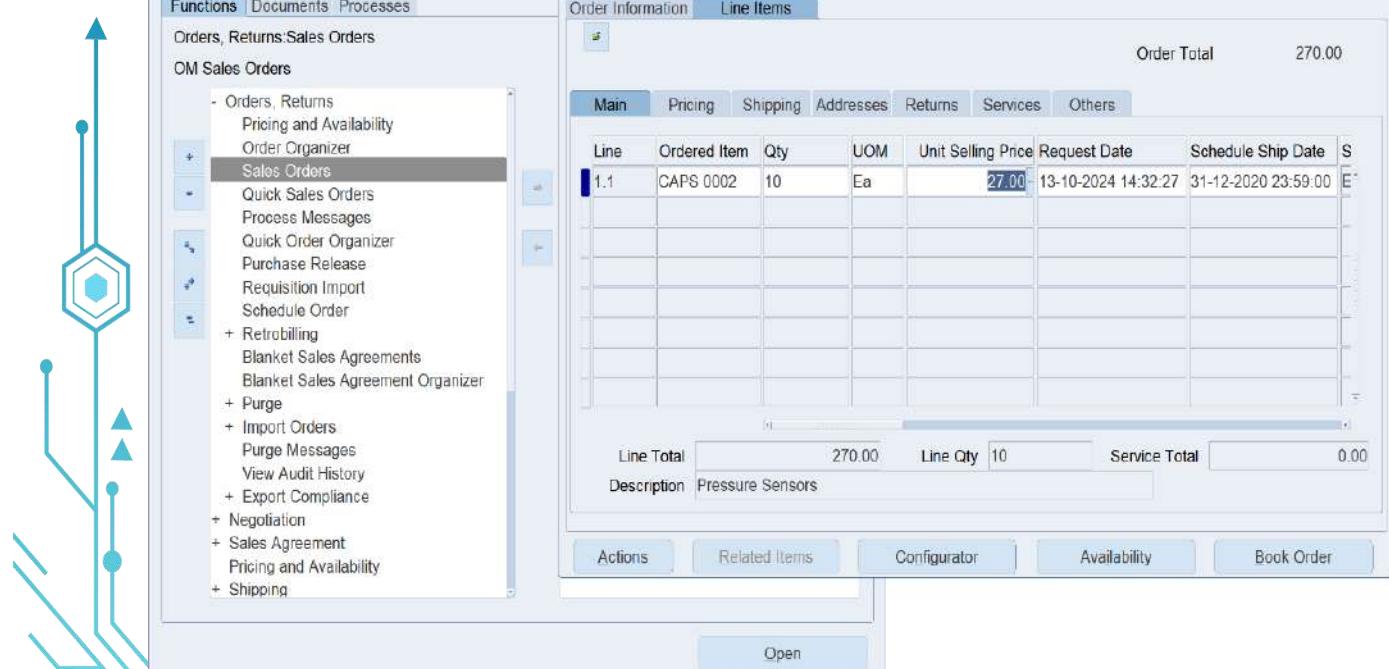
The screenshot shows the SAP Business One application interface. On the left, there's a navigation tree under 'OM Sales Orders' with various options like 'Orders, Returns', 'Sales Orders', and 'Sales Agreement'. The 'Sales Orders' option is currently selected. The main area has tabs for 'Order Information' and 'Line Items'. In the 'Line Items' tab, a context menu is open over a specific line item. The menu includes actions like 'Find%', 'Action', 'Release Holds', etc., with 'View Adjustments' being the highlighted option. At the bottom of the menu, there are 'Find', 'OK', and 'Cancel' buttons. The top right corner of the screen shows the total values: 'Order Total' at 200.00 and 'Service Total' at 0.00.





Sense the Future

The screenshot shows the Oracle Sales Orders application interface. The top menu bar includes File, Edit, View, Folder, Tools, Window, Help, and various icons. The title bar indicates the current window is "Sales Orders (Visible Conditions) - 60365 Avenger's Electronic". On the left, a navigation tree under "Functions" shows categories like Orders, Returns, Sales Orders, OM Sales Orders, and Sales Orders. Under Sales Orders, several sub-options are listed, including "Sales Orders" which is currently selected. The main workspace has tabs for "Order Information" and "Line Items". The "Line Items" tab is active, displaying a table with columns: Line, Item, Description, Qty, UOM, List Price, Selling Price, and Unit Price. A single row is shown for "CAPS 0002" with a quantity of 10, UOM of Ea, List Price of 20.00, and Selling Price of 20.00. To the right of the table, there are fields for "Unit Price" (20.00), "Last Update Date" (3/5/2024), and "Status" (S). Below the table, there are tabs for "Adjustments", "Reason", and "Accruals". The "Adjustments" tab is selected, showing a table with columns: Level, Modifier Number, Name, Type, List Line, Rate, and Amount Reduced. One row is visible for "2024D DEPI Surcharge 24" with a rate of 7. At the bottom, there are buttons for "Cancel", "Attributes", "Related Details", and "Apply".

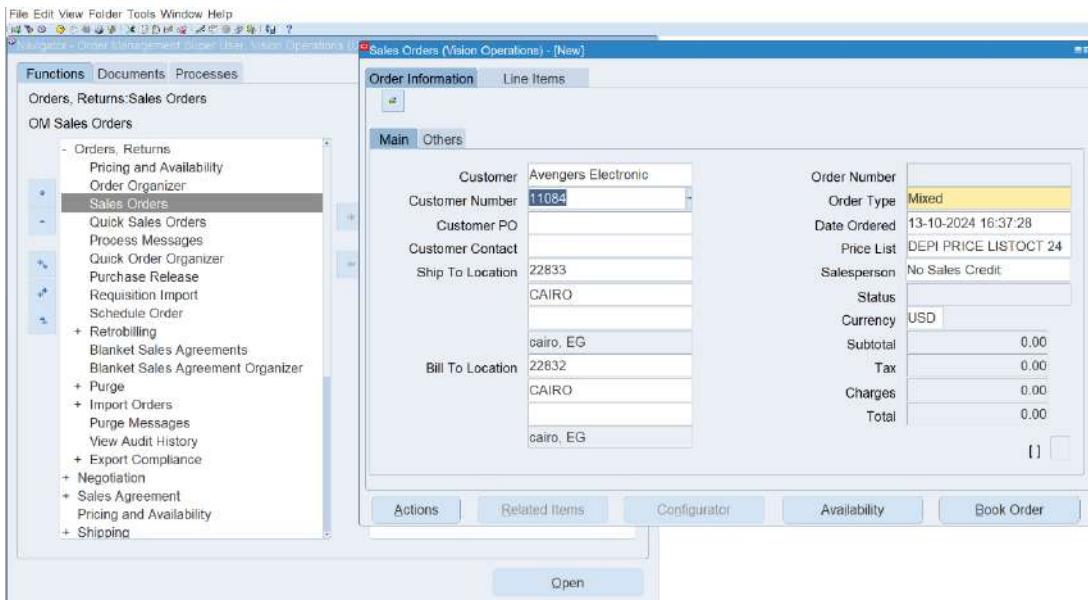


# Sense the Future

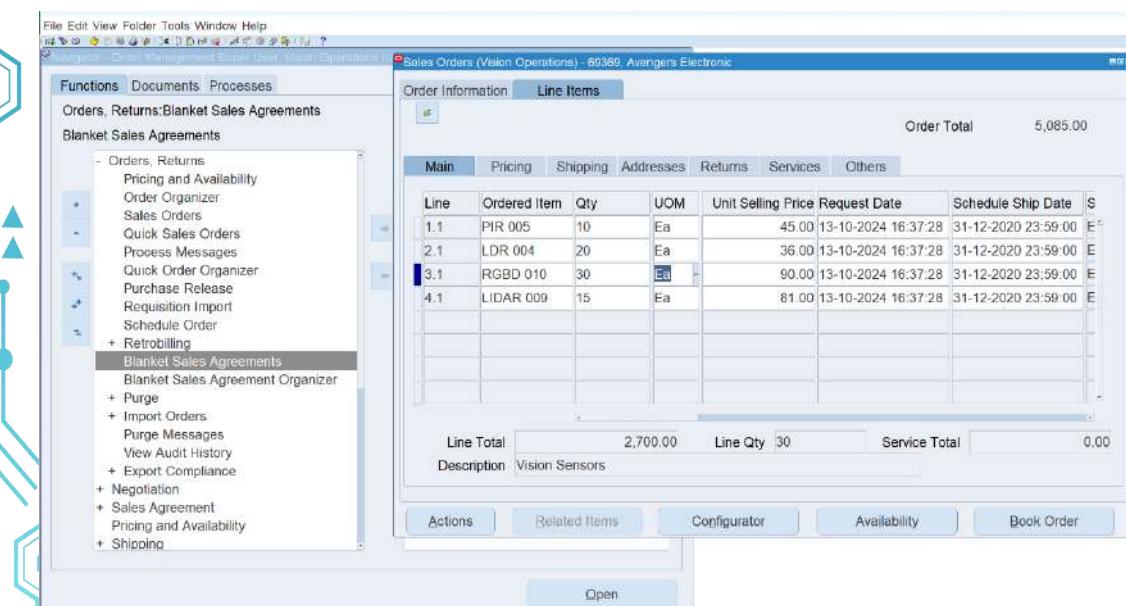
## 7. Sales order

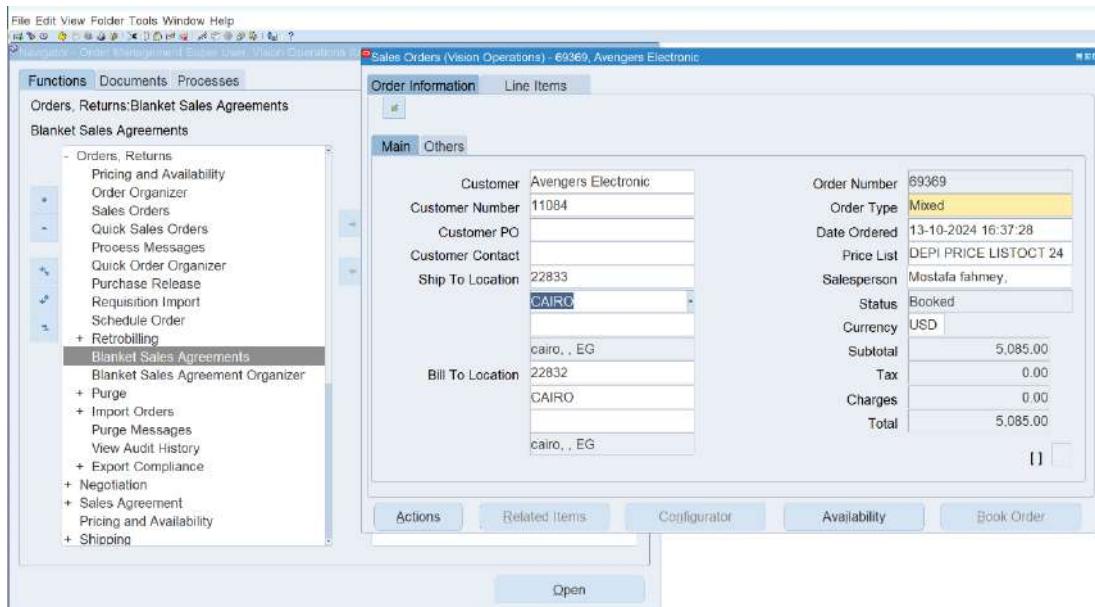
### Step 1: book sales order

- Order management super user -> orders, return ->sales order
- Insert the customer or sales person details, order type, price list then, save
- Insert the details on (line item): ordered item, quantity, etc.
- Book order



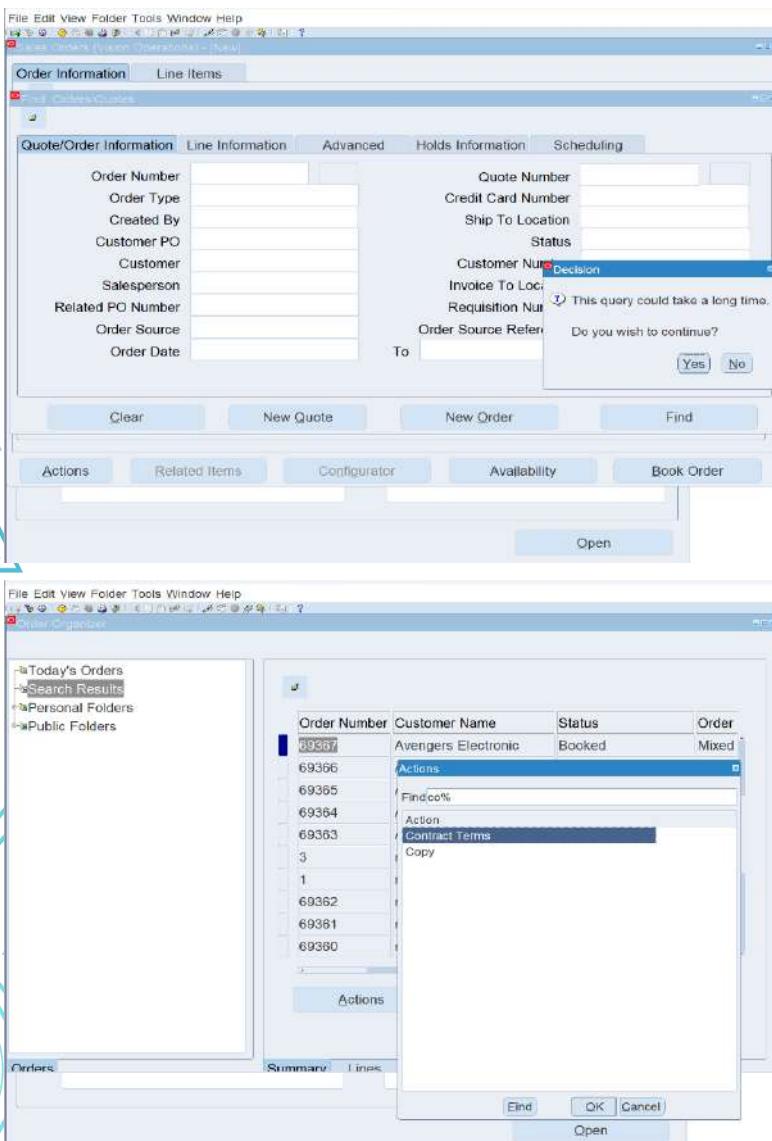
- Order management super user -> orders, returns -> blanket sales agreement
- Insert the details on (line item): ordered item, quantity, etc.
- Book order, the status: booked with number (69369)



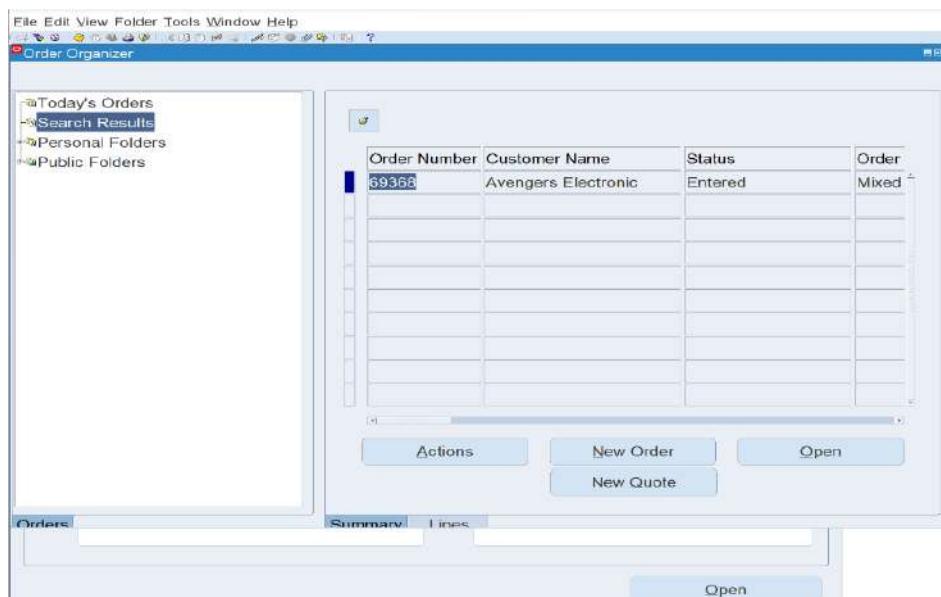
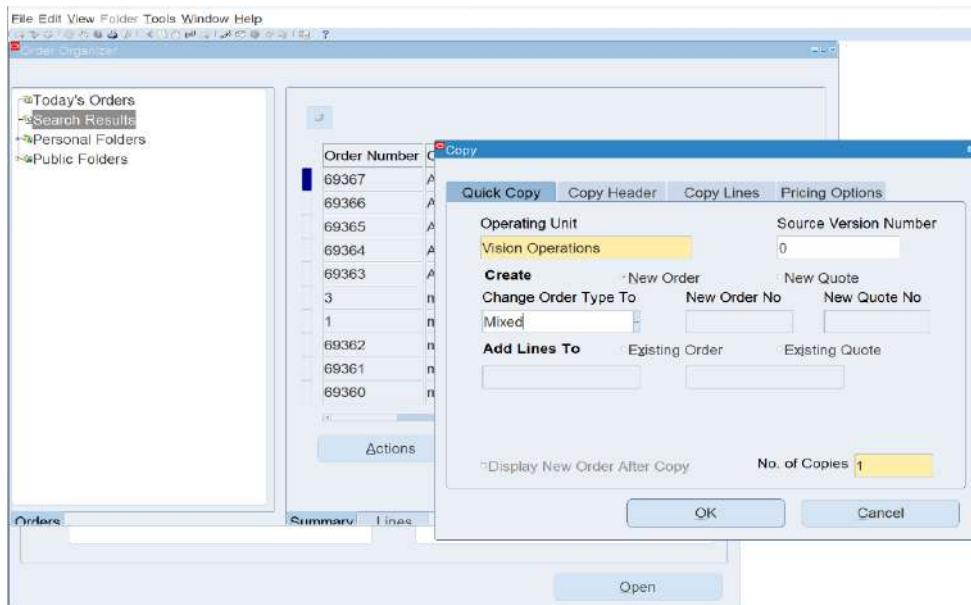


## 8. Copy sales order

- Order management super user -> orders, return ->sales order
- Insert order number then find
- From action select copy

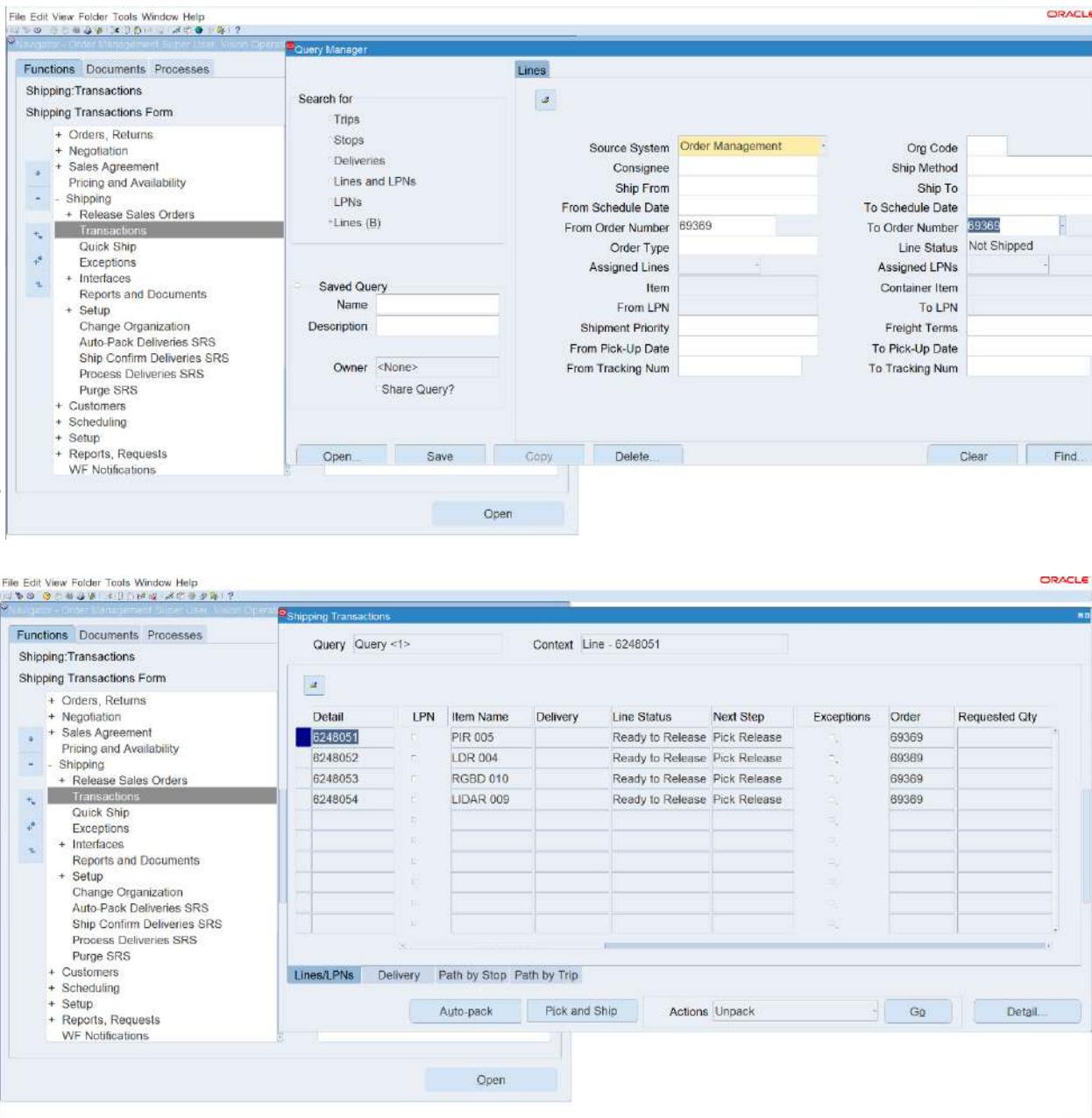


- Insert the order type to be changed, the number of copies
- Click ok



## 9. Shipping

- Order management super user -> Shipping -> Transactions
- Query Manager Window opens. Enter your order number in the fields From Order Number and To Order Number. Select not shipped in the Line Status field.
- Click Find
- The Shipping Transactions window opens to display your order details with the statuses.



The screenshot displays two windows from the Oracle Order Management application:

**Query Manager Window:**

- Left Panel:** Functions, Documents, Processes. Under Shipping Transactions Form, the "Transactions" node is selected.
- Right Panel:** Lines search interface. Fields include:
  - Source System: Order Management
  - Consignee: [empty]
  - Ship From: [empty]
  - From Schedule Date: [empty]
  - From Order Number: 89369
  - Order Type: [empty]
  - Assigned Lines: [empty]
  - Item: [empty]
  - From LPN: [empty]
  - Shipment Priority: [empty]
  - From Pick-Up Date: [empty]
  - From Tracking Num: [empty]
- Buttons:** Open, Save, Copy, Delete, Clear, Find.

**Shipping Transactions Window:**

- Left Panel:** Functions, Documents, Processes. Under Shipping Transactions Form, the "Transactions" node is selected.
- Right Panel:** Shipping Transactions grid. The grid shows order details:
 

Detail	LPN	Item Name	Delivery	Line Status	Next Step	Exceptions	Order	Requested Qty
6248051	PIR 005			Ready to Release	Pick Release		69369	
6248052	LDR 004			Ready to Release	Pick Release		69389	
6248053	RGBD 010			Ready to Release	Pick Release		69369	
6248054	LIDAR 009			Ready to Release	Pick Release		69369	
- Bottom Buttons:** Lines/LPNs, Delivery, Path by Stop, Path by Trip, Auto-pack, Pick and Ship, Actions, Unpack, Go, Detail...

- On item line open action and select: auto pick release, auto create delivery

File Edit View Folder Tools Window Help

Shipping:Transactions

Shipping Transactions Form

- + Orders, Returns
- + Negotiation
- + Sales Agreement Pricing and Availability
- Shipping
  - + Release Sales Orders
  - Transactions**
    - Quick Ship
    - Exceptions
    - + Interfaces Reports and Documents
    - + Setup Change Organization Auto-Pack Deliveries SRS Ship Confirm Deliveries SRS Process Deliveries SRS Purge SRS
    - + Customers
    - + Scheduling
    - + Setup
    - + Reports, Requests WFN Notifications

Line - 6248051

Line/LPN

Item	PIR 005	Consignee	Avengers Electronic	Status	Ready to Release
Item Description	Motion Sensors	Ship to	49401 - CAIRO-cairo--EG	Exceptions	
LPN		Intermediate Ship to		FOB	Destination
Delivery		Ship Instructions		Carrier	DHL
Ship from	M1- Seattle Mfg : 3455 10	Packing Instructions		Freight Terms	Prepaid
Requested Qty UOM	Ea	Ship Method	DHL	Weight UOM	
Requested Qty	10	Parent LPN		Gross Weight	
Picked Qty		Seal Code		Tare Weight	
Shipped Qty		Tracking Number		Net Weight	
Backordered Qty		Details Required		Volume UOM	
Stage Qty		Pending Overpick		Volume	

Actions

- Launch Pick Release
- Pack
- Packing Workbench
- Pick and Ship
- Reset Weight/Vol
- Split Line

Auto-pack Pick and Ship Open Go Done

File Edit View Folder Tools Window Help

Shipping:Transactions

Shipping Transactions Form

- + Orders, Returns
- + Negotiation
- + Sales Agreement Pricing and Availability
- Shipping
  - + Release Sales Orders
  - Transactions**
    - Quick Ship
    - Exceptions
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Requested Qty UOM	Ea	Ship Method	DHL	Weight UOM	
Requested Qty	10	Parent LPN		Gross Weight	
Picked Qty		Seal Code		Tare Weight	
Shipped Qty		Tracking Number		Net Weight	
Backordered Qty		Details Required		Volume UOM	
Stage Qty		Pending Overpick		Volume	

Actions

- Auto-create Deliveries
- Auto-create Trip
- Auto-pack
- Auto-pack Master
- Create LPNs
- Ignore For Planning

Auto-pack Pick and Ship Open Go Done

File Edit View Folder Tools Window Help

Shipping Transactions

Query Query <1> Context Line - 6248051

Detail	LPN	Item Name	Delivery	Line Status	Next Step	Exceptions	Order	Req
6248051		PIR 005	6258834	Released to Warehouse	Transact Move Order		69369	
6248052		LDR 004	6258831	Released to Warehouse	Transact Move Order		69369	
6248053		RGBD 010	6258832	Released to Warehouse	Transact Move Order		69369	
6248054		LIDAR 009	6258833	Released to Warehouse	Transact Move Order		69369	

Lines/LPNs Delivery Path by Stop Path by Trip

Auto-pack Pick and Ship Actions Auto-create Deliveries Go Detail...

Open

- Order management super user -> move order -> transact move order
- Select the inventory organization, insert sales order number then ok
- Select the sales order numbers then transact

File Edit View Folder Tools Window Help

Organizations

Find %

C... Name

EM1 Seattle Maintenance  
FAC Facility Maintenance Op...  
G12 Operating\_Unit\_X  
HIIH Operating\_Unit\_H  
M1 Seattle Manufacturing  
M2 Boston Manufacturing  
M3 Dallas Manufacturing

Find OK Cancel

+ ABC Codes  
+ Accounting Close Cycle  
+ Reports  
Requests  
+ Setup  
Change Organization  
Notification Summary  
Workflow Monitor  
Notification List  
Workflow Background Engine  
- Move Orders  
Move Orders  
Move Orders  
Transact Move Orders  
HTML Move Orders

Top Ten List

1. Sales Orders
2. Shipping Transactions Form
3. Transact Move Orders
4. OMT Transaction Types
5. Document Sequences
6. Document Sequence Assignments
7. Processing Constraints
8. Sales Agreements
9. Customers: Standard
10. Shipping Networks

Open

File Edit View Folder Tools Window Help

Transact Move Orders (M1)

Transaction Date: [ ]

Select

Allocations Number	Type	Line	Transaction Type	Item	Rev	Source Su
	Pick Wave					
	Headers	Lines	Source and Destination	Pick Wave		
	Sales Order	Sales Order Number	69369			
	Work Order	Type	Job			
		Job				
		Line				
		Start Date				
		Assembly	Dept			

Pick Slip Number: [ ]

Sales Order Number: 69369

Work Order Type: Job

Line: [ ]

Start Date: [ ]

Assembly: [ ] Dept: [ ]

Clear Find OK Cancel Combinations Clear Help

Description: [ ]

Allocate View/Update Allocations Transact

File Edit View Folder Tools Window Help

Transact Move Orders (M1)

Transaction Date: 13-10-2024 17:00:25

Select

Allocations Number	Type	Line	Transaction Type	Item	Rev	Source Su
6423343	Pick Wave	1	Sales Order Pick	PIR 005		
6423344	Pick Wave	1	Sales Order Pick	LDR 004		
6423345	Pick Wave	1	Sales Order Pick	RGBD 010		
6423346	Pick Wave	1	Sales Order Pick	LIDAR 009		

Description: Proximity and Distance Sensors

Allocate View/Update Allocations Transact

File Edit View Folder Tools Window Help

Transact Move Orders (M1)

Transaction Date: 13-10-2011 17:03:31

Select

Allocations Number	Type	Line	Transaction Type	Item	Rev	Source Su
6423344	Pick Wave	1	Sales Order Pick	LDR 004		
6423345	Pick Wave	1	Sales Order Pick	RGBD 010		

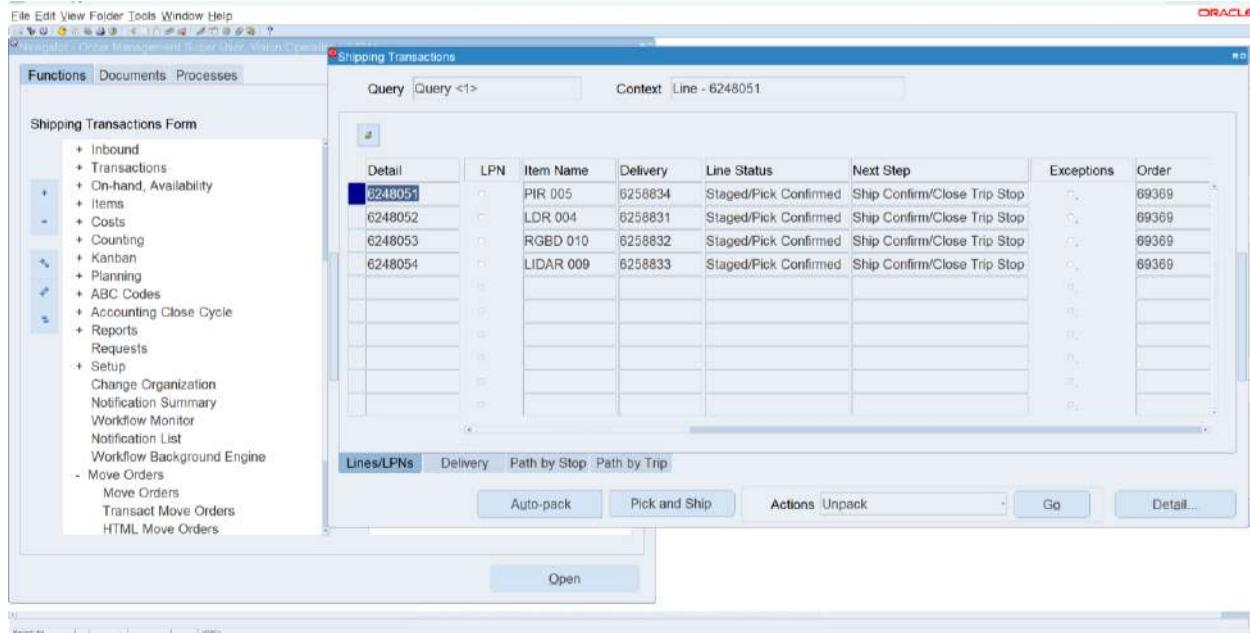
Note: The material pick release and pick confirmation process completed without errors.

OK

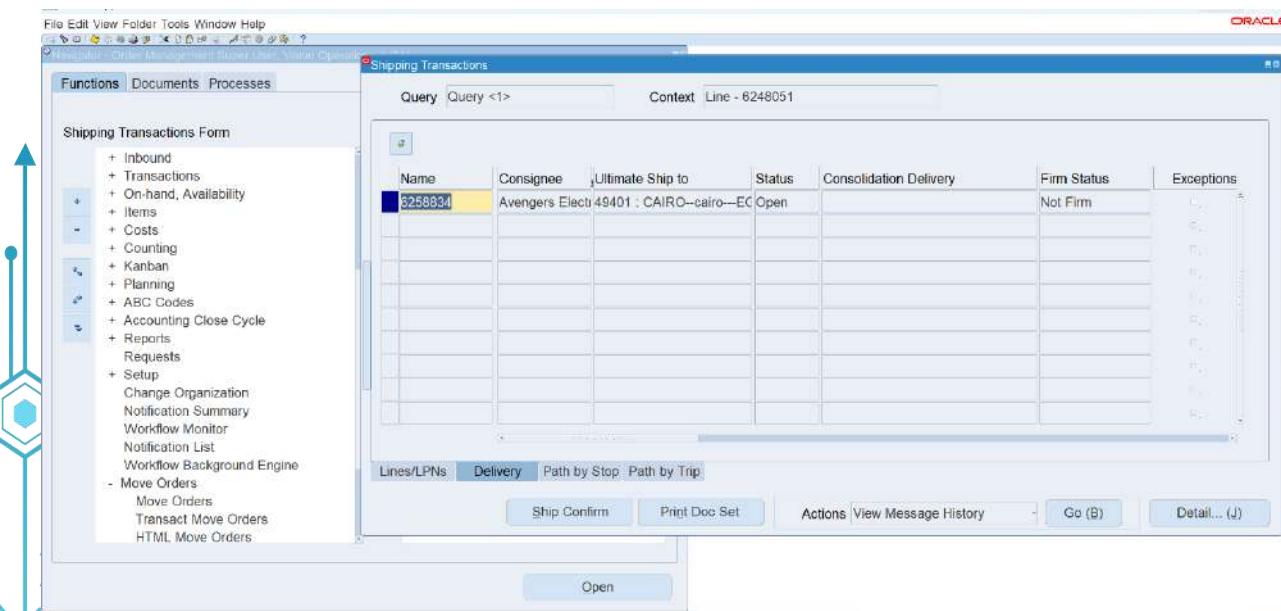
Description: Light Sensors

Allocate View/Update Allocations Transact

- A confirmation message appears click ok
- Shipping transaction window opens



- Click on delivery tab, the delivery is auto created, then click on ship confirm



- Insert ship method then ok  
 ● A message confirming the delivery, click ok

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Inventory - Order Management Super User, Vision Operator

Shipping Transactions

**Confirm Delivery**

Ship Confirm Rule: Auto Ship

Ship Options

- Ship Entered Quantities
- Unspecified Quantities **Ship**
- Ship All
- Backorder All
- Cycle Count All
- Backorder Reason

Create Delivery for Staged Quantities

**Trip Options**

- Ship Method: DHL
- Actual Departure Date: 13-10-2024 17:08
- Set Delivery In-Transit
- Create Bill of Lading
- Close Trip
- Defer Interface

Document Set: Ship Confirm Documents

OK Cancel Open

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Inventory - Order Management Super User, Vision Operator

Shipping Transactions

**Confirm Delivery**

Ship Confirm Rule: Auto Ship

Ship Options

- Ship Entered Quantities
- Unspecified Quantities **Ship**
- Ship All
- Backorder All
- Cycle Count All
- Backorder Reason

Delivery was successfully confirmed

**Trip Options**

- Actual Departure Date: 13-10-2024 17:08
- Set Delivery In-Transit
- Create Bill of Lading
- Close Trip
- Defer Interface

Document Set: Ship Confirm Documents

OK Cancel Details

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Material Transactions (MT)

Location	Intransit	Reason, Reference	Transaction ID	Transaction Type	Consumption Advice		
LIDAR 009	Sales order	69369.Mixed.ORDER E Sales order issue		Issue from stores	Ea	-15	26327165
RGBD 010	Sales order	69369.Mixed ORDER E Sales order issue		Issue from stores	Ea	-30	26327158
LDR 004	Sales order	69369.Mixed ORDER E Sales order issue		Issue from stores	Ea	-20	26327151
PIR 005	Sales order	69369.Mixed ORDER E Sales order issue		Issue from stores	Ea	-10	26327144
XP9007	Sales order	65154.Order Only.ORD Sales order issue		Issue from stores	Ea	-8	23109980
XP9007	Sales order	65155.Order Only.ORD Sales order issue		Issue from stores	Ea	-12	23109979
XP9006	Sales order	65155.Order Only.ORD Sales order issue		Issue from stores	Ea	-6	23109978
XP9005	Sales order	65155.Order Only.ORD Sales order issue		Issue from stores	Ea	-9	23109977
XP9005	Sales order	65154.Order Only.ORD Sales order issue		Issue from stores	Ea	-8	23109976
XP9004	Sales order	65147.Order Only.ORD Sales order issue		Issue from stores	Ea	-17	23109975

Item Description: Motion Sensors  
 Primary UOM: Ea  
 Secondary UOM:   
 Date: 13-10-2011 17:06:33  
 Primary Quantity: -10  
 Secondary Quantity:   
 Distributions  Lot / Serial   
 Open

## 10. Quotes

- Create Transaction Type
- Order management super user->set up ->transaction types ->define
- Enter transaction type, order category, effective date
- Click assign line workflow, click ok
- A request submitted (8880429)

Operating Unit: Vision Operations  
Transaction Type: DEPI QUT SALES  
Order Category: Mixed  
Effective Dates: 01-01-2021  
Layout Template  
Contract Template  
Retain Document Number  
Approvals  
Validate Workflow  
Use Approvals Management Engine  
Assign Line Flows

Line Type	Item Type	Process Name	Start Date	End Date	Workflow
Standard (Line Invoice)		Line Flow - Generic	01-01-2020		Generic

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Navigator - Order Management Super User, Vision Order Management

Transaction Types

**Functions Documents Processes**

Setup: Transaction Types: Define

ONT transaction types

- + Shipping
- + Customers
- + Scheduling
- Setup
- + Orders
- + Items
- + Bills
- + Financials
- + Sales
- + Shipping
- + Documents
- + Customers
- + Rules
- + UOM
- + QuickCodes
- + Tax
- Profiles
- Shipping Tolerances
- + Documents
- Transaction Types
- Define**
- Approvals

Operating Unit Vision Operations

Description DEPI OUT SALES

Order Category Mixed

Fulfillment Flow Order Flow - Generic

Effective Dates 01-01-2020 -

Layout Template

Contract Template

Transaction Type DEPI OUT SALES

Sales Document Type Sales Order

Transaction Type Code Order

Negotiation Flow Negotiation Flow - Gener

Default Transaction Phase [ ]

Retain Document Number Approvals Validate Workflow

Use Approvals Management Engine Assign Line Flows

Main Shipping Finance

Document

Agreement Type Default Return Line Type Return (Receipt)

Agreement Required Default Order Line Type Standard (Line Invo)

Purchase Order Required

Pricing

Enforce List Price Price List DEPI PRICE LIST OCT 24

Minimum Margin Percent

Credit Check Rule

Ordering Packing

Picking/Purchase Release Shipping

Credit Card

Request of Credit Card Authorization and De-authentication



Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Navigator - Order Management Super User, Vision Order Management

Transaction Types

**Functions Documents Processes**

Setup: Transaction Types: Define

ONT transaction types

- + Shipping
- + Customers
- + Scheduling
- Setup
- + Orders
- + Items
- + Bills
- + Financials
- + Sales
- + Shipping
- + Documents
- + Customers
- + Rules
- + UOM
- + QuickCodes
- + Tax
- Profiles
- Shipping Tolerances
- + Documents
- Transaction Types
- Define**
- Approvals

Operating Unit Vision Operations

Description DEPI OUT SALES

Order Category Mixed

Fulfillment Flow Order Flow - Generic

Effective Dates 01-01-2020 -

Layout Template

Contract Template

Transaction Type DEPI OUT SALES

Sales Document Type Sales Order

Transaction Type Code Order

Negotiation Flow Negotiation Flow - Gener

Default Transaction Phase [ ]

Retain Document Number Approvals Validate Workflow

Use Approvals Management Engine Assign Line Flows

Main Shipping Finance

Document

Agreement Type Request submitted. Your request ID is 8880429

Agreement Required OK

Purchase Order Required

Pricing

Enforce List Price Price List

Minimum Margin Percent

Credit Check Rule

Ordering Packing

Picking/Purchase Release Shipping

Credit Card

Request of Credit Card Authorization and De-authentication

- Enter (main, shipping, finance) tabs details

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Navigator - Order Management Super User, Vision Order Management

Transaction Types

**Functions Documents Processes**

Setup: Transaction Types: Define

ONT transaction types

- + Shipping
- + Customers
- + Scheduling
- Setup
- + Orders
- + Items
- + Bills
- + Financials
- + Sales
- + Shipping
- + Documents
- + Customers
- + Rules
- + UOM
- + QuickCodes
- + Tax
- Profiles
- Shipping Tolerances
- + Documents
- Transaction Types
- Define**
- Approvals

Operating Unit Vision Operations

Description DEPI OUT SALES

Order Category Mixed

Fulfillment Flow Order Flow - Generic

Effective Dates 01-01-2020 -

Layout Template

Contract Template

Transaction Type DEPI OUT SALES

Sales Document Type Sales Order

Transaction Type Code Order

Negotiation Flow Negotiation Flow - Gener

Default Transaction Phase [ ]

Retain Document Number Approvals Validate Workflow

Use Approvals Management Engine Assign Line Flows

Main Shipping Finance

Warehouse Seattle Manufacturing

Shipment Priority Freight Terms

FOB Shipping Source Type

Demand Class Scheduling Level

Inspection Required Auto Schedule

Line Set Fulfillment Set

Bill Only

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Navigation - Order Management Super User, Vision Operations

### Transaction Types

**Functions Documents Processes**

**Setup: Transaction Types: Define**

**ONT transaction types**

- + Shipping
- + Customers
- + Scheduling
- Setup
- Orders
- + Items
- + Bills
- + Financials
- + Sales
- + Shipping
- + Documents
- + Customers
- + Rules
- + UOM
- + QuickCodes
- + Tax
- Profiles
- Shipping Tolerances
- + Documents
- Transaction Types

  - Define
  - Approvals

**Operating Unit**: Vision Operations

**Description**: Mixed

**Fulfillment Flow**: Order Flow - Generic

**Effective Dates**: 01-01-2020

**Layout Template**

**Contract Template**

**Transaction Type**: DEPI QUT SALES

**Sales Document Type**: Sales Order

**Transaction Type Code**: Order

**Negotiation Flow**: Negotiation Flow - Gener

**Default Transaction Phase**

**Retain Document Number**

**Approvals**

**Validate Workflow**

**Use Approvals Management Engine**

**Assign Line Flows**

**Main Shipping Finance**

**Rule**: Invoicing Rule

**Accounting Rule**

**Source**: Invoice Source ORDER ENTRY Non Delivery Invoice Source ORDER ENTRY

**Credit Method For**: Invoices With Rules Split Term Invoices

**Receivables Transaction Type**: Invoice

**Tax Event**

**Cost of Goods Sold Account**

**Currency**: USD

**Conversion Type**: Corporate

- Review automation: Documents -> Assign

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Navigation - Order Management Super User, Vision Operations

### Sequence Assignments

**Functions Documents Processes**

**Setup:Documents:Assign**

**Assign document sequences**

- + Orders, Returns
- + Negotiation
- + Sales Agreement
- Pricing and Availability
- Shipping
- + Customers
- + Scheduling
- Setup
- Orders
- + Items
- + Bills
- + Financials
- + Sales
- + Shipping
- Documents
- Define
- Categories
- Assign**
- + Customers
- + Rules
- + UOM
- + QuickCodes

**Open**

Application	Category	Start Date	End Date	Sequence
Order Management	DEPI QUT SALES	01-01-2020		DEPI QUT SALES
Order Management	DEPI QUT SALES-Quo	01-01-2020		DEPI QUT SALES

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Navigation - Order Management Super User, Vision Operations

### Sequence Assignments

**Functions Documents Processes**

**Setup:Documents:Assign**

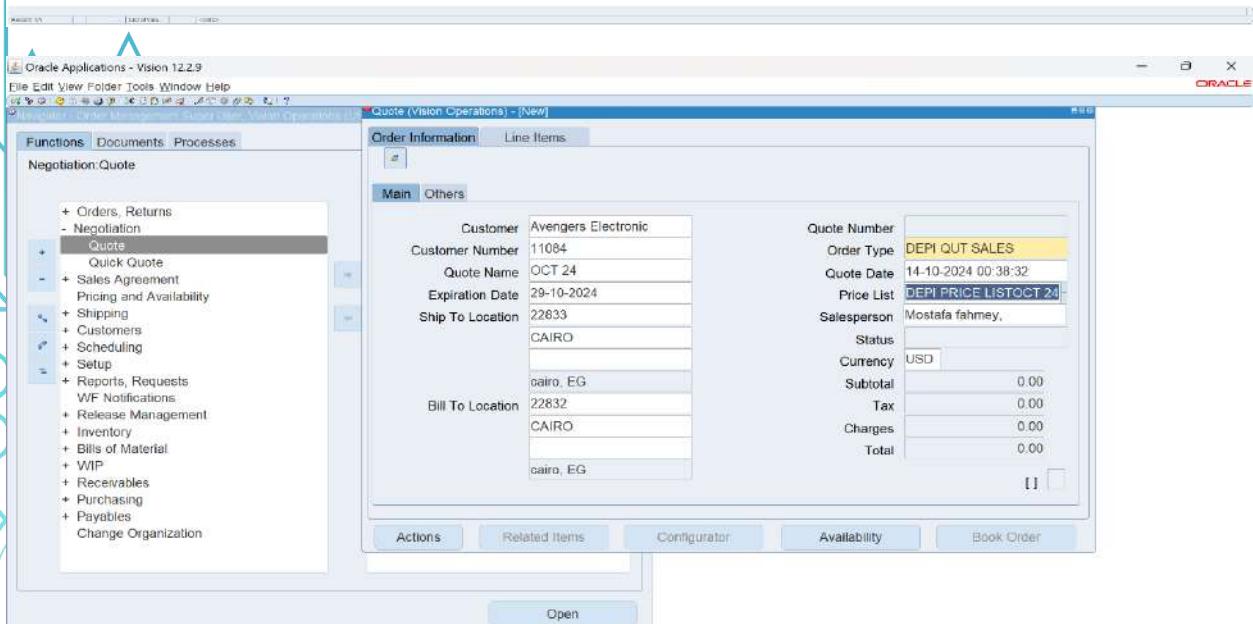
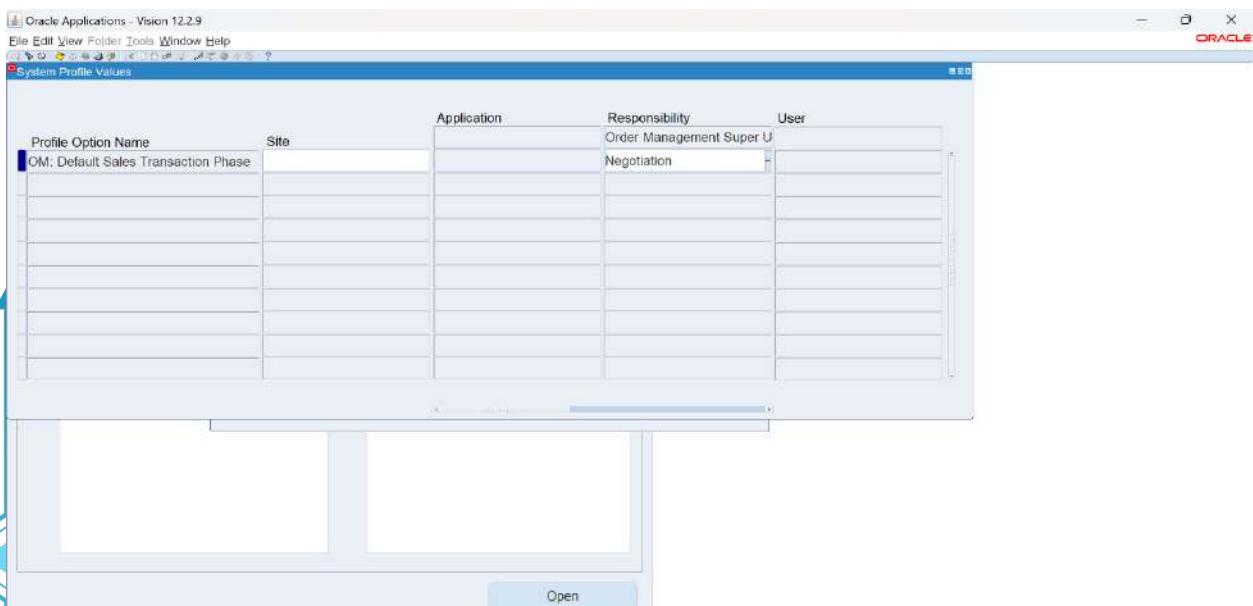
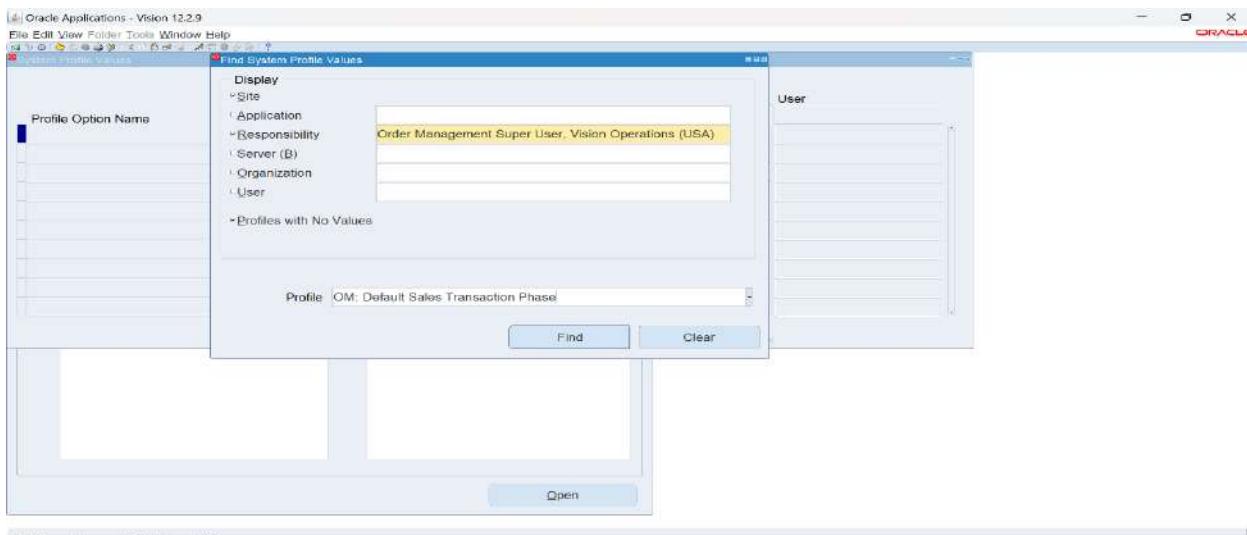
**Assign document sequences**

- + Orders, Returns
- + Negotiation
- + Sales Agreement
- Pricing and Availability
- Shipping
- + Customers
- + Scheduling
- Setup
- Orders
- + Items
- + Bills
- + Financials
- + Sales
- + Shipping
- Documents
- Define
- Categories
- Assign**
- + Customers
- + Rules
- + UOM
- + QuickCodes

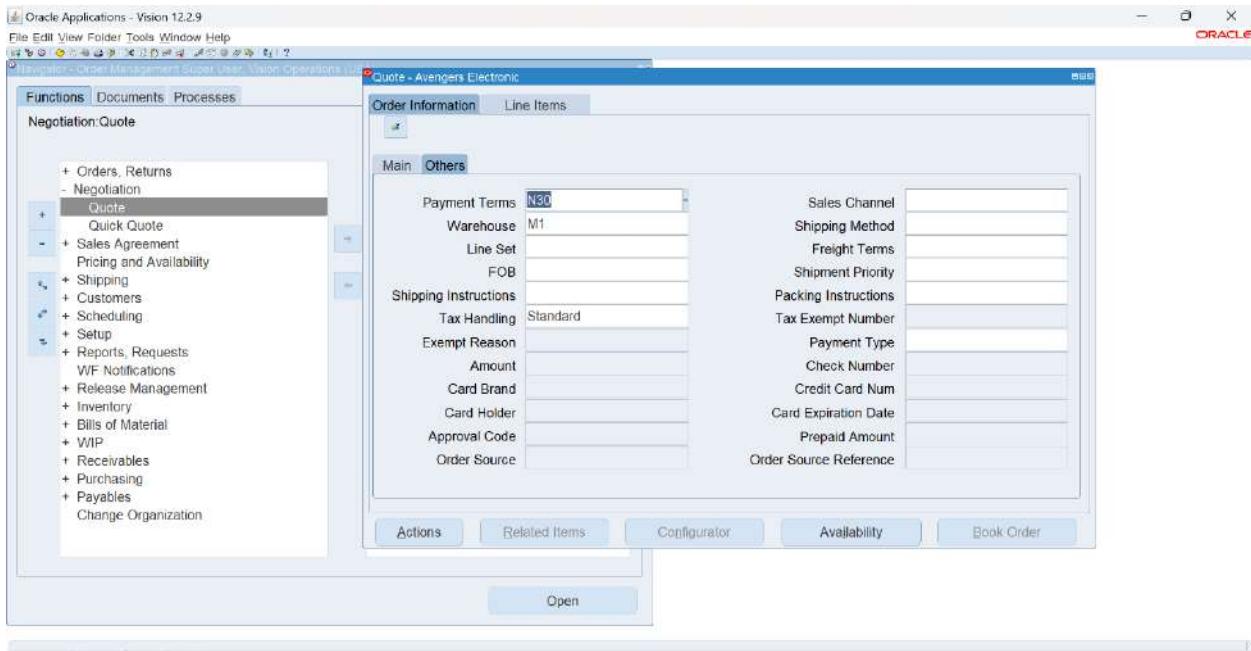
**Open**

Application	Category	Ledger	Method
Order Management	DEPI QUT SALES	Vision Operations (USA)	Automatic
Order Management	DEPI QUT SALES-Quo	Vision Operations (USA)	Automatic

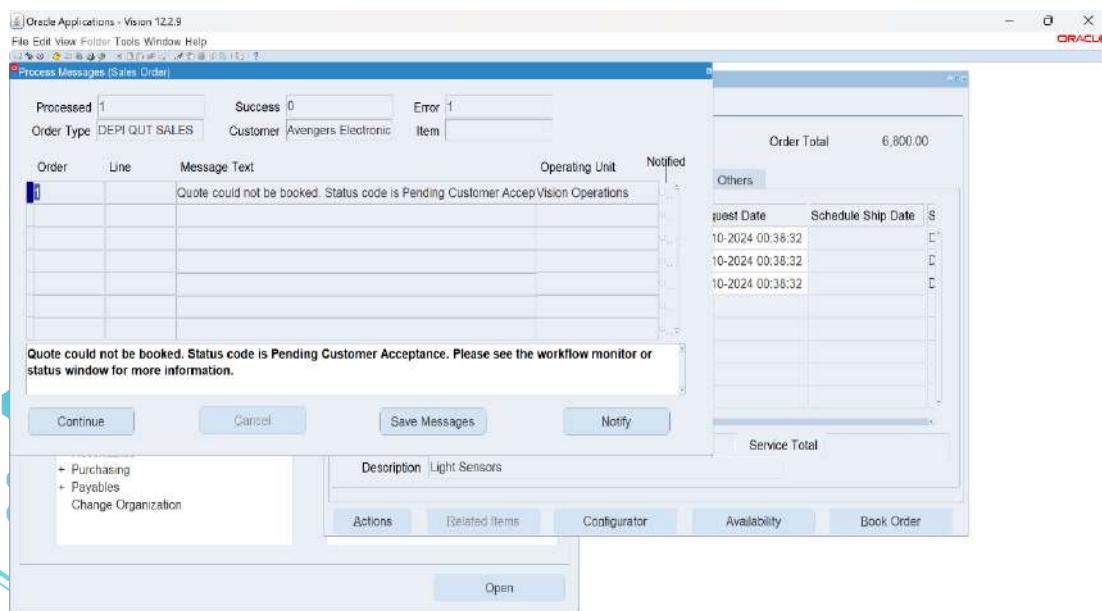
- Defaulting rule: Set profile option
- System admin -> system -> profile (enter the responsibility and profile) then find.
- On responsibility level choose negotiation



- Create quote: negotiation ->quotes
- Enter the main and offer tabs details: (customer name, price list, order type, payment terms, etc.)



- Enter line details for the quote
- The quote status is pending
- Action: customer acceptance



Oracle Applications - Vision 12.9

File Edit View Folder Tools Window Help

Sales Orders (Vision Operations) - 1. Avengers Electronic

Functions Documents Processes

Negotiation Quote

- + Orders, Returns
- Negotiation
- + Quick Quote
- + Sales Agreement
- Pricing and Availability
- + Shipping
- + Customers
- + Scheduling
- + Setup
- + Reports, Requests
- WF Notifications
- + Release Management
- + Inventory
- + Bills of Material
- + WIP
- + Receivables
- + Purchasing
- + Payables
- Change Organization

**Order Information**

Main Others

Customer: Avengers Electronic

Actions	Find %
Expiration Date	Action
Ship To Location	Add Customer
Bill To Location	Apply Automatic Attachments
Actions	
Customer Acceptance	
Customer Rejected	
Get Cost	
Lost	
Notification	
Payments	
Preview and Print	
Price Quote	
Process Quote	

Quote Number: 1

Order Type: DEPI QUT SALES

Quote Date: 14-10-2024 00:38:32

Price List: DEPI PRICE LIST OCT 24

Salesperson: Mostafa fahmey,

Status: Pending Customer Acceptance

Currency: USD

Subtotal: 6,600.00

Tax: 0.00

Charges: 200.00

Total: 6,800.00

Availability Book Order

Open OK Cancel

Oracle Applications - Vision 12.9

File Edit View Folder Tools Window Help

Acceptance

Transaction Name: OCT 24

Customer: Avengers Electronic

Customer Contact:

Quote Number: 1

Version: 0

Customer Number: 11084

Status: Pending Customer Acceptance

Acceptance

Customer: Signed By: mohamed

Supplier: Signed By: samir

Signed Date:

Signed Date:

Cancel Customer Accepted

Bill To Location: 22832 CAIRO cairo, , EG

Actions Related Items Configurator Availability Book Order

Open

**Order Information**

Main Others

Customer: Avengers Electronic

Actions	Find %
Expiration Date	Action
Ship To Location	Add Customer
Bill To Location	Apply Automatic Attachments
Actions	
Customer Acceptance	
Customer Rejected	
Get Cost	
Lost	
Notification	
Payments	
Preview and Print	
Price Quote	
Process Quote	

Quote Number: 1

Order Type: DEPI QUT SALES

Quote Date: 14-10-2024 00:38:32

Price List: DEPI PRICE LIST OCT 24

Salesperson: Mostafa fahmey,

Status: Pending Customer Acceptance

Currency: USD

Subtotal: 6,600.00

Tax: 0.00

Charges: 200.00

Total: 6,800.00

Availability Book Order

Oracle Applications - Vision 12.9

File Edit View Folder Tools Window Help

Sales Orders (Vision Operations) - 1. Avengers Electronic

Functions Documents Processes

Negotiation: Quote

- + Orders, Returns
- Negotiation
- + Quick Quote
- + Sales Agreement
- Pricing and Availability
- + Shipping
- + Customers
- + Scheduling
- + Setup
- + Reports, Requests
- WF Notifications
- + Release Management
- + Inventory
- + Bills of Material
- + WIP
- + Receivables
- + Purchasing
- + Payables
- Change Organization

**Order Information**

Main Others

Customer: Avengers Electronic

Actions	Find %
Customer Number	11084
Quote Name	OCT 24
Expiration Date	29-10-2024
Ship To Location	22833 CAIRO cairo, , EG
Bill To Location	22832 CAIRO cairo, , EG
Actions	
Related Items	
Configurator	
Availability	
Book Order	

Quote Number: 1

Order Type: DEPI QUT SALES

Quote Date: 14-10-2024 00:38:32

Price List: DEPI PRICE LIST OCT 24

Salesperson: Mostafa fahmey,

Status: Entered

Currency: USD

Subtotal: 6,600.00

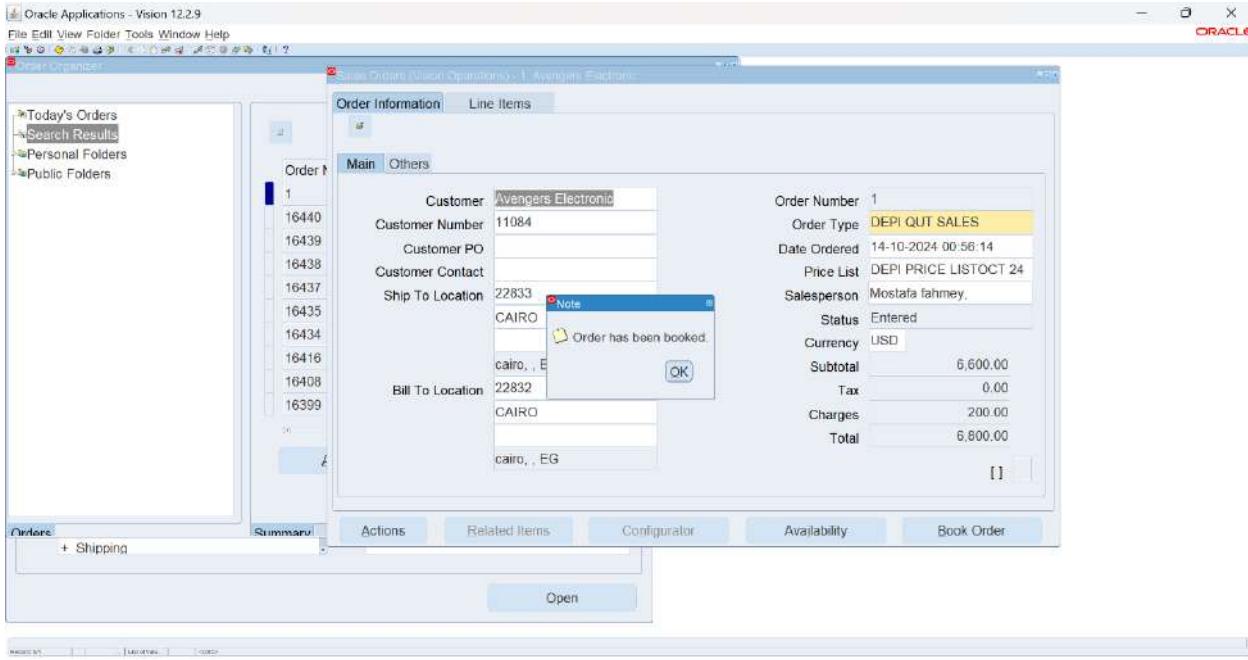
Tax: 0.00

Charges: 200.00

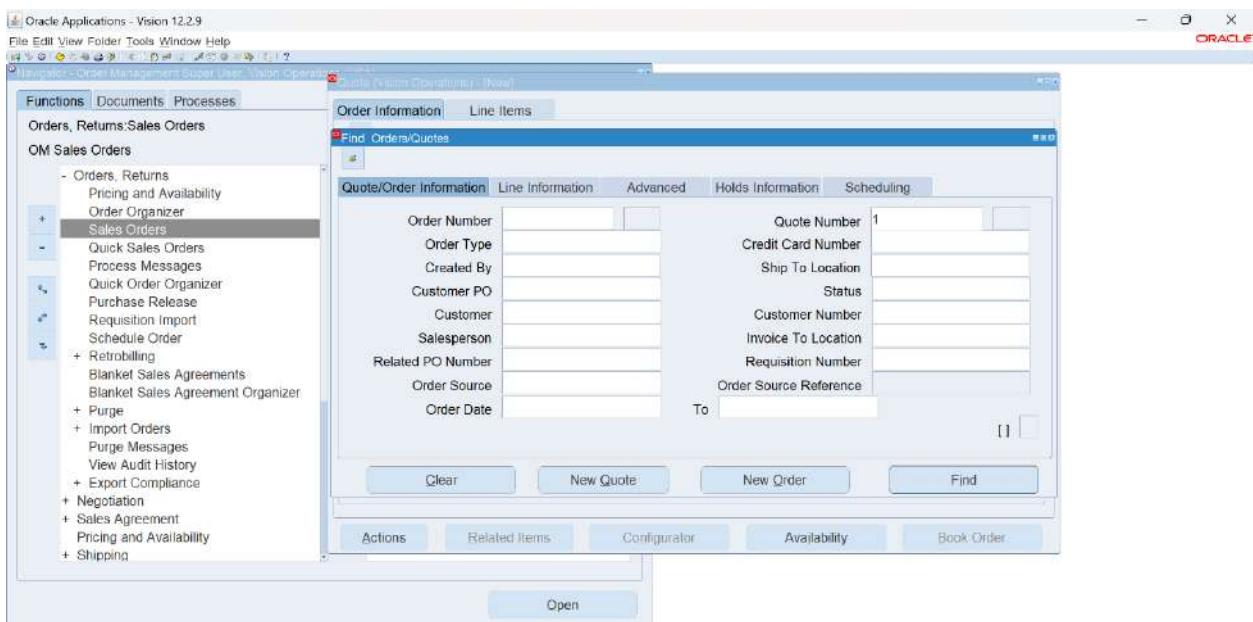
Total: 6,800.00

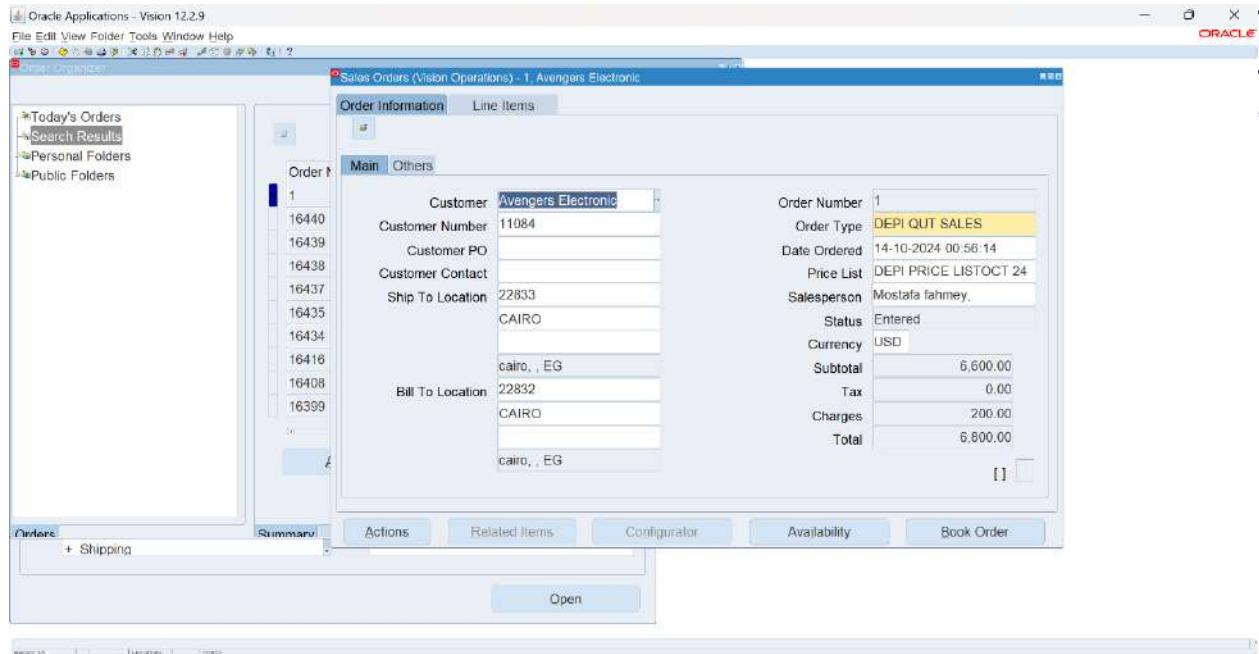
Availability Book Order

Open



- Once Quote is Approve, it automatically converted in Sales order. System will Automatically Assign the Order Header level and line level workflow to Sales Order and Lines
- From sales order window click book order





## 11. Shipping the order:

- Order management super user -> Shipping -> Transactions

Detail	LPN	Item Name	Delivery	Line Status	Next Step	Exceptions	Order	Requested Qty
6249051		PIR 005		Ready to Release	Pick Release		1	
6249052		LDR 004		Ready to Release	Pick Release		1	

Detail	LPN	Item Name	Delivery	Line Status	Next Step	Exceptions	Order	Requested Qty
6249051	6259831	PIR 005	6259831	Released to Ware	Transact Move		1	
6249052	6259832	LDR 004	6259832	Released to Ware	Transact Move		1	

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Transact Move Orders (M1)

Transaction Date: 14-10-2024 01:38:29

Select

Allocations Number	Type	Line	Transaction Type	Item	Rev	Source SU
6424343	Pick Wave	1	Sales Order Pick	PIR 005		
6424344	Pick Wave	1	Sales Order Pick	LDR 004		

Description: Light Sensors

Allocate      View/Update Allocations      Transact

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Material Transactions (M1)

Location	Intransit	Reason, Reference	Transaction ID	Transaction Type	Consumption Advice		
PIR 005	Sales order	1.DEP1 QUT SALES.OF Sales order issue		Issue from stores	Ea	-40	26331156
PIR 005	Sales order	1.DEP1 QUT SALES.OF Sales Order Pick		Staging transfer	Ea	40	26331150
PIR 005	Sales order	1.DEP1 QUT SALES.OF Sales Order Pick		Staging transfer	Ea	-40	26331149
LDR 004	Sales order	1.DEP1 QUT SALES.OF Sales order issue		Issue from stores	Ea	-100	26331144
LDR 004	Sales order	1.DEP1 QUT SALES.OF Sales Order Pick		Staging transfer	Ea	100	26330143
LDR 004	Sales order	1.DEP1 QUT SALES.OF Sales Order Pick		Staging transfer	Ea	-100	26330142

Item Description: Motion Sensors

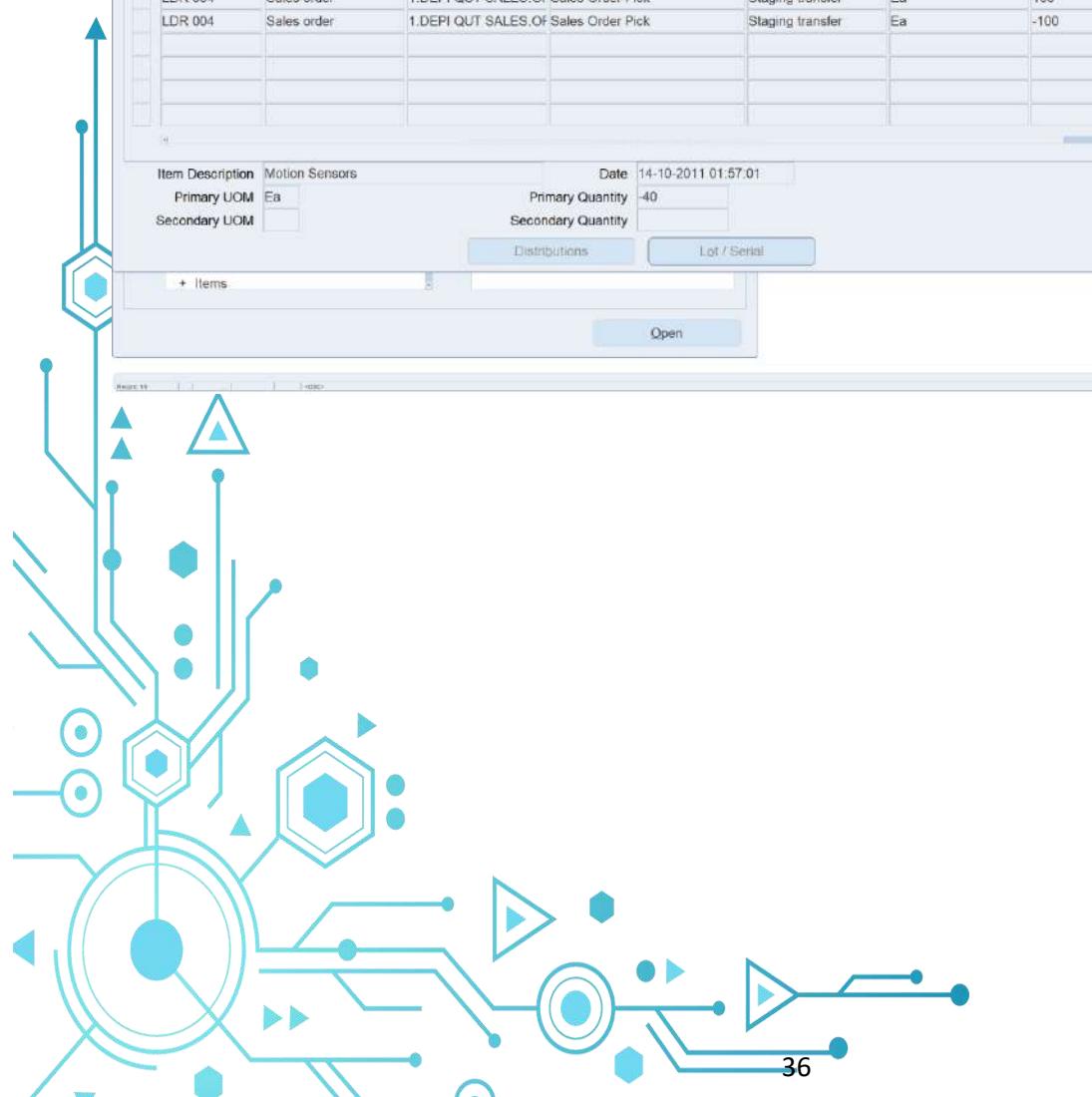
Date: 14-10-2011 01:57:01

Primary UOM: Ea      Primary Quantity: -40

Secondary UOM:      Secondary Quantity:

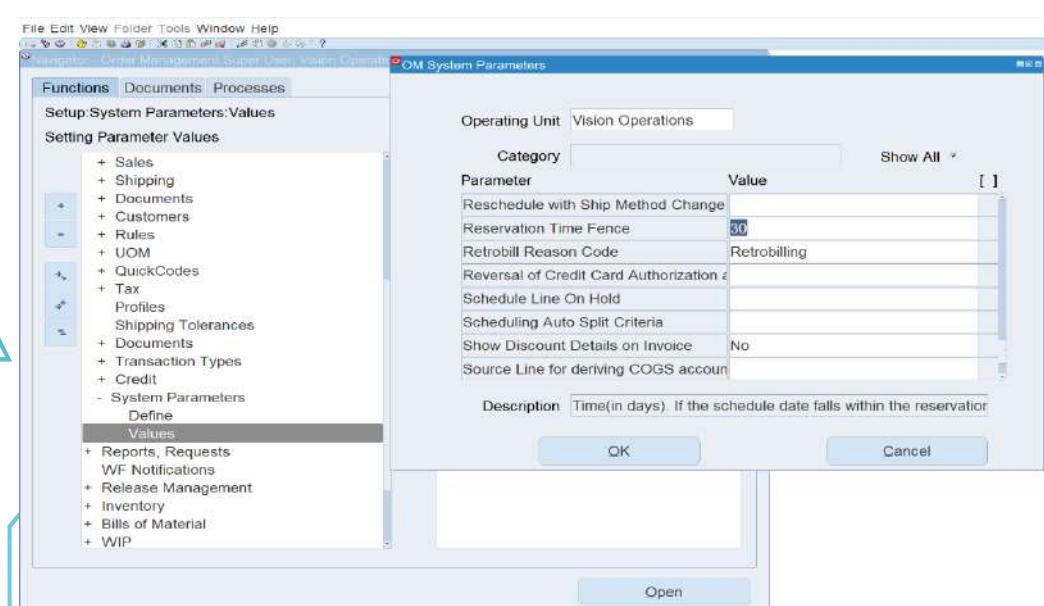
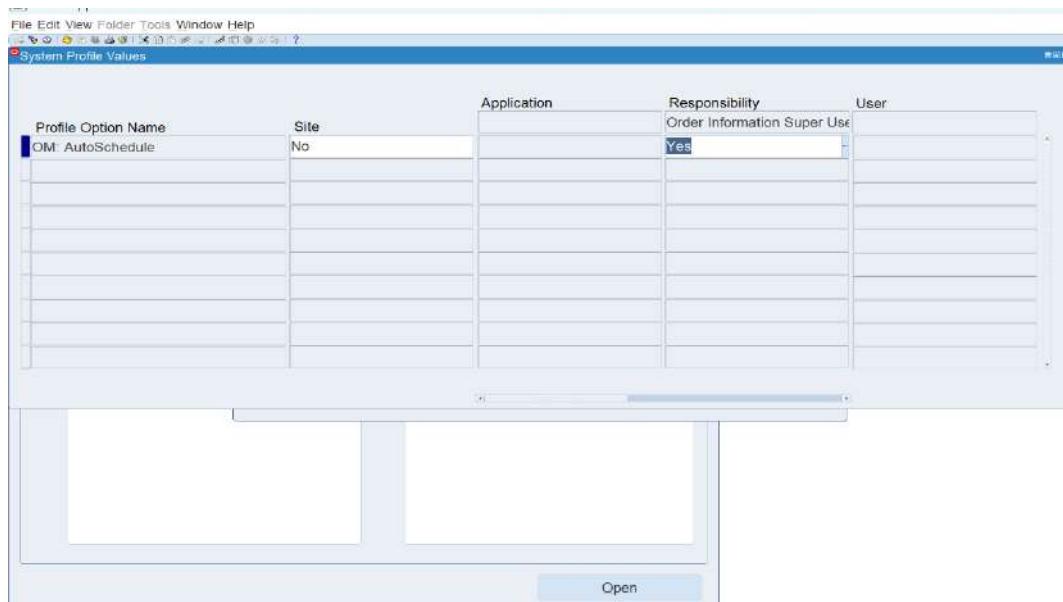
Distributions      Lot / Serial

+ Items      Open

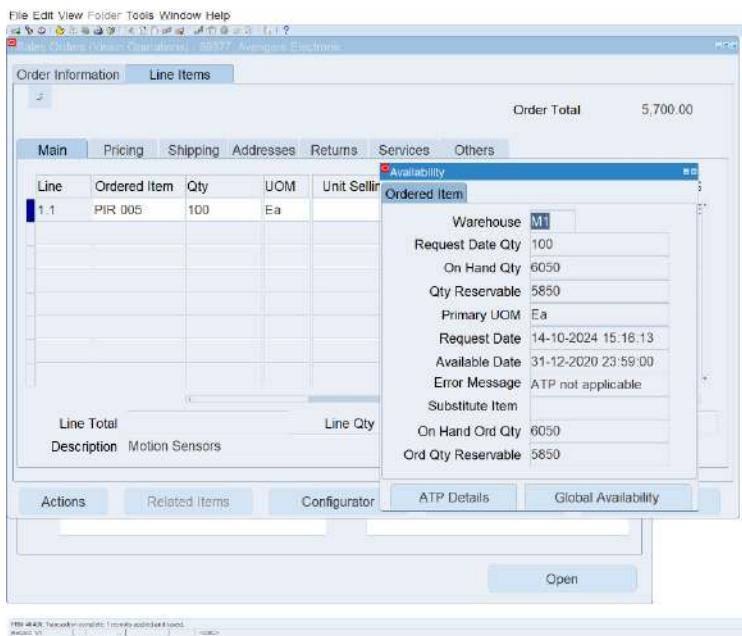


## 12. Manual Reservation

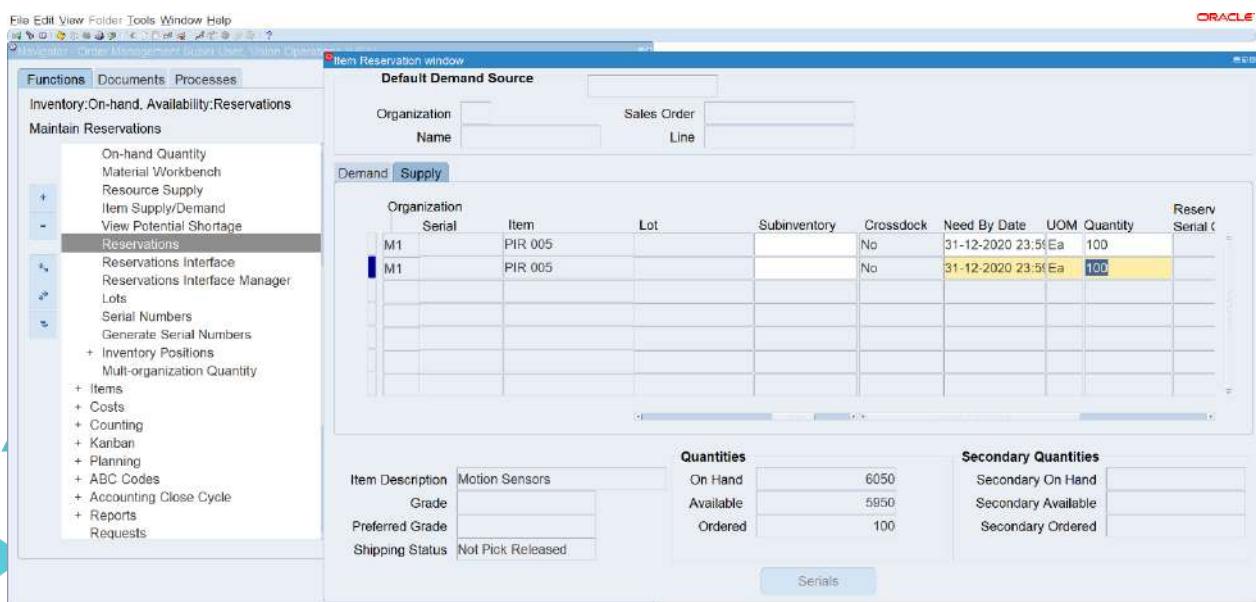
- In the system administration Responsibility-> Profile -> system.
- Set the following profile option: – OM: Auto Schedule = yes on responsibility level, then save
- Order management super user-> Setup-> System Parameters -> Values, Reservation Time Fence = 30., ok



- From sales order window select the order line check availability

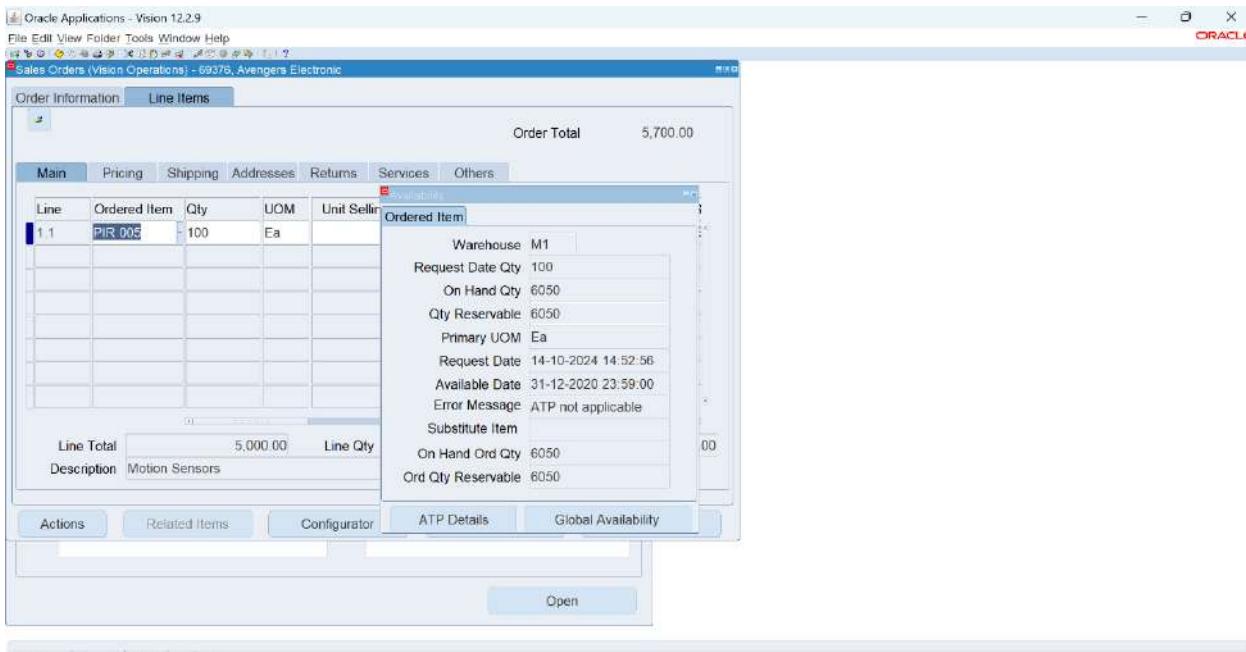


- Order management super user -> inventory -> on hand availability ->reservation
- Displays the items and the quantity to reserve (100)

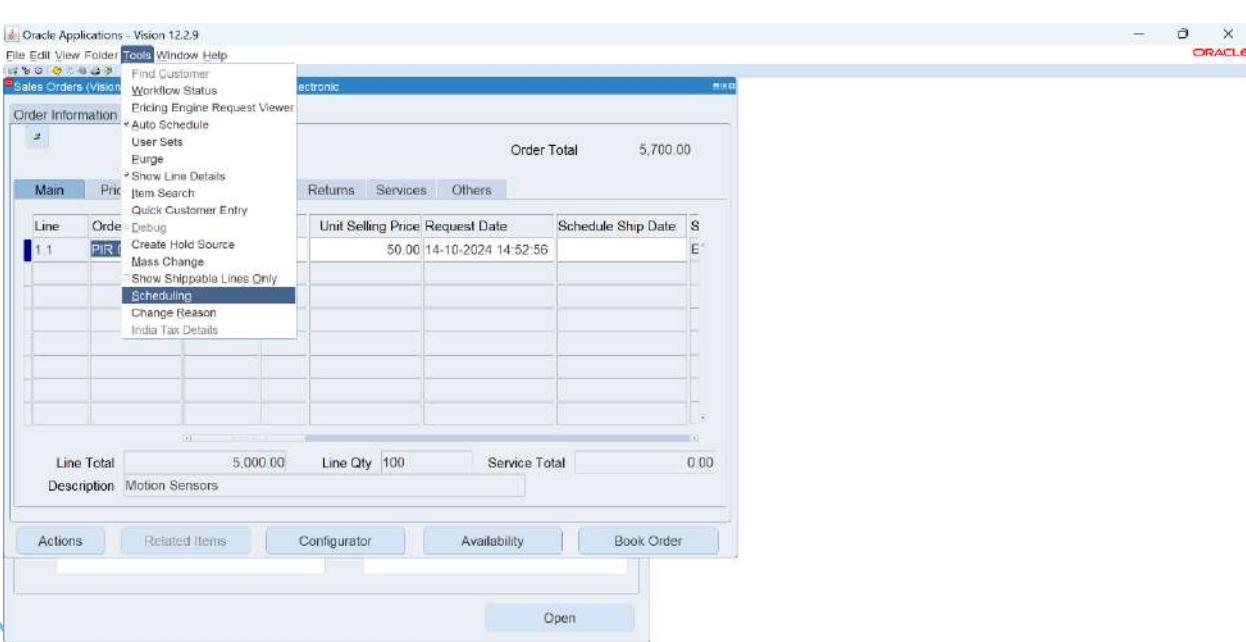


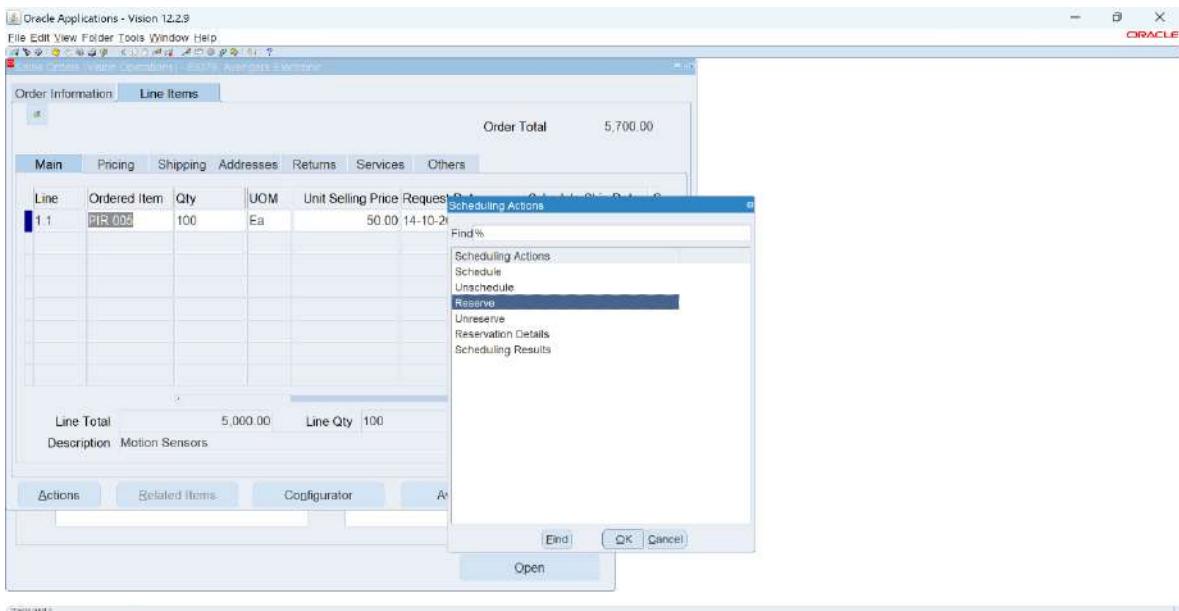
## 13. Auto sales order

- From sales order window select the order line check availability

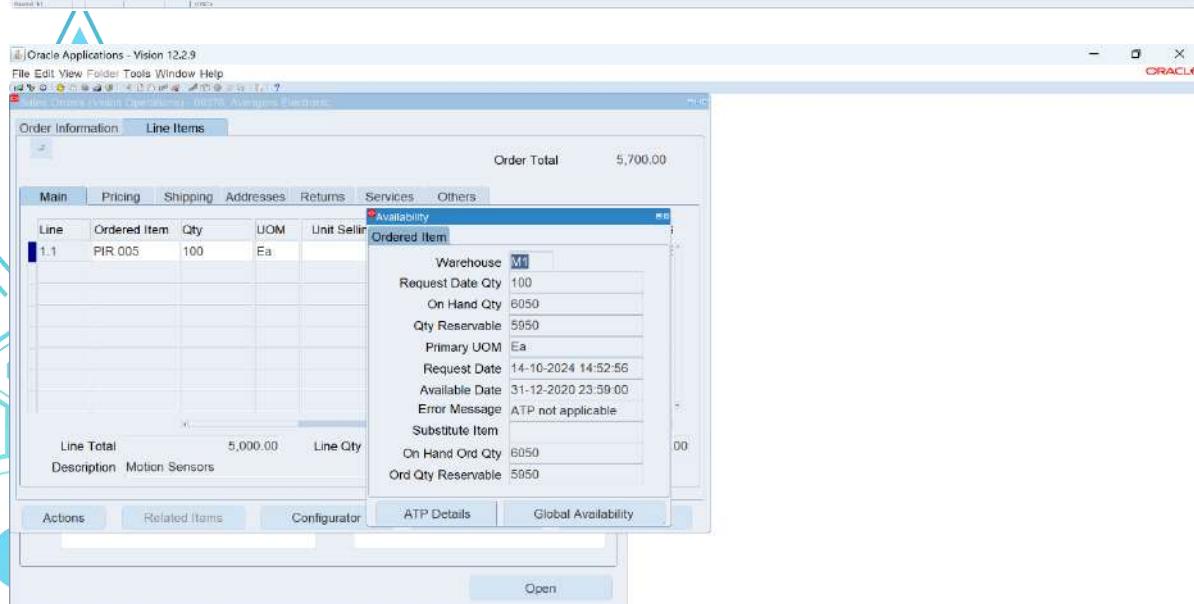
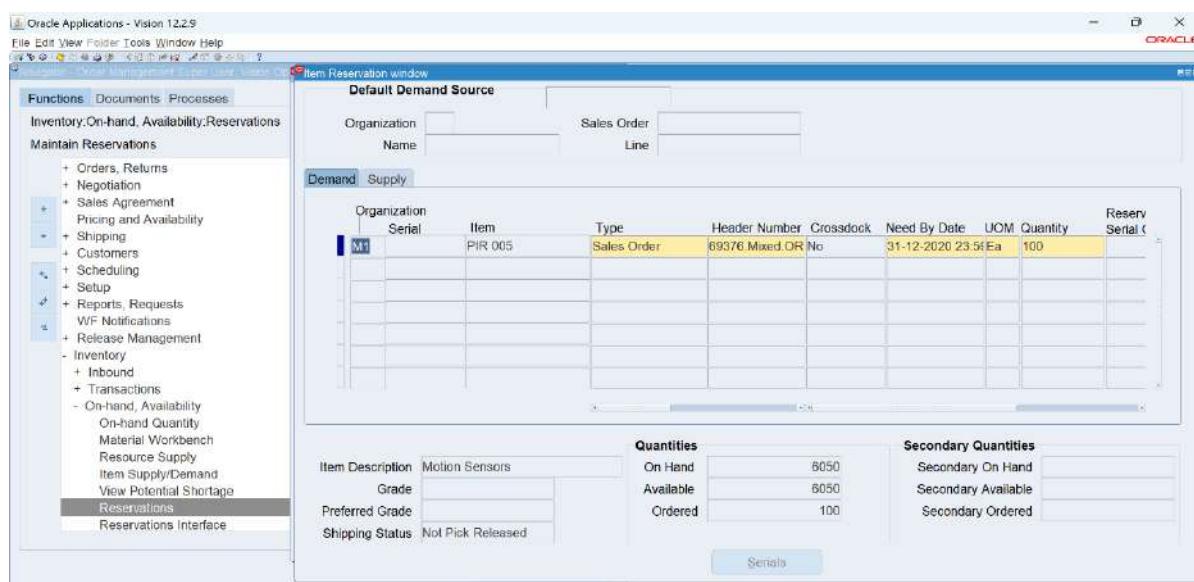


- From tools -> scheduling
- Select reserve, the quantity reservable changed





- Order management super user -> inventory -> on hand availability ->reservation
- Displays the items and the quantity to reserve (100)



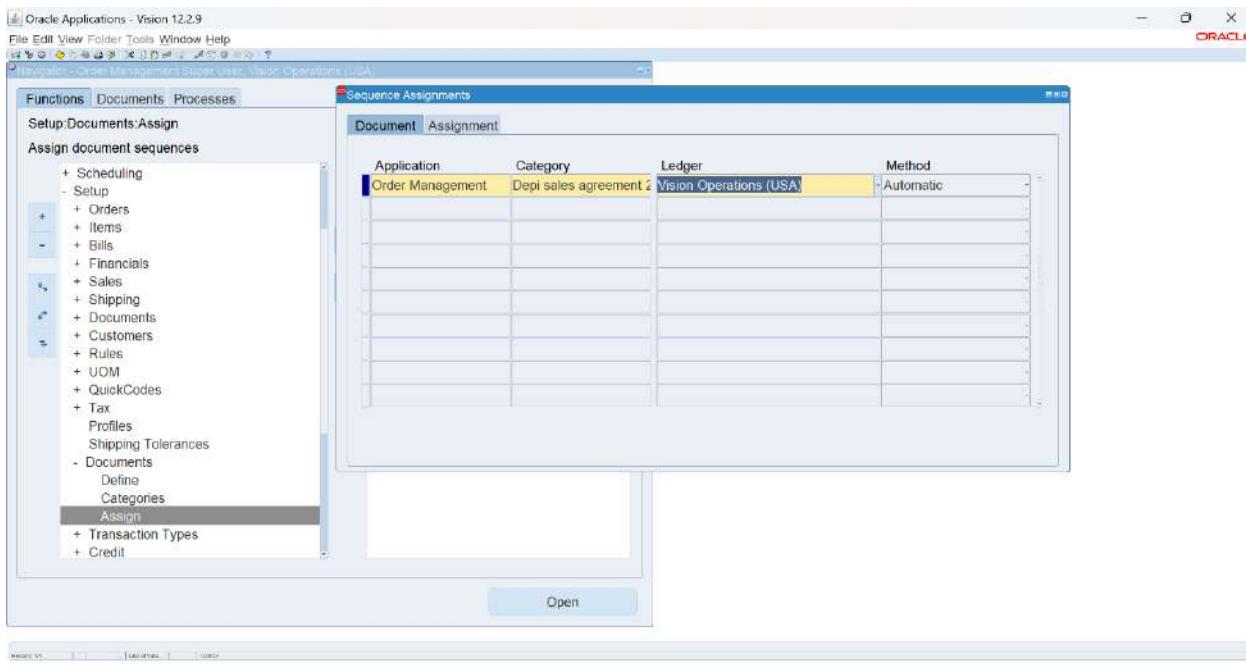
## 14. Sales agreement

- Define transaction type for sales agreement
- Enter required fields as business, validate work flow

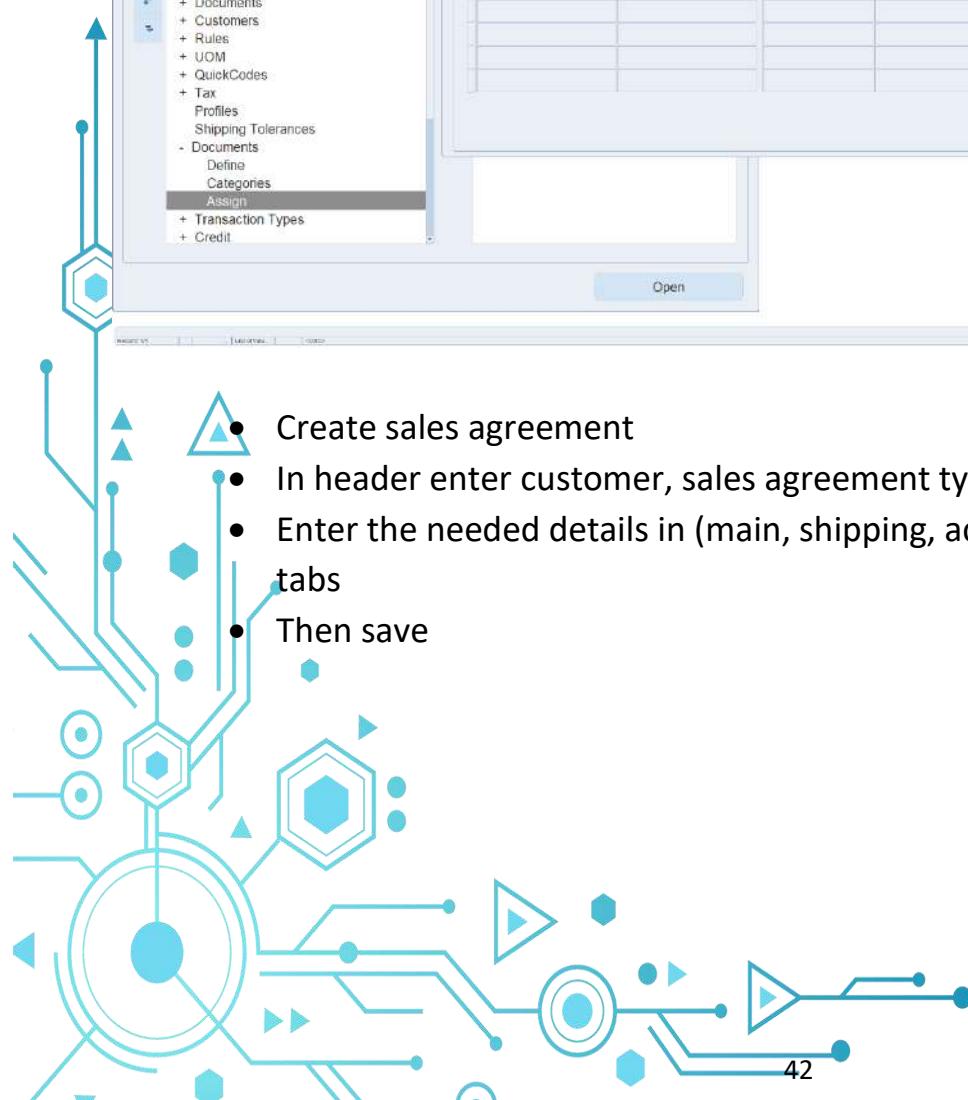
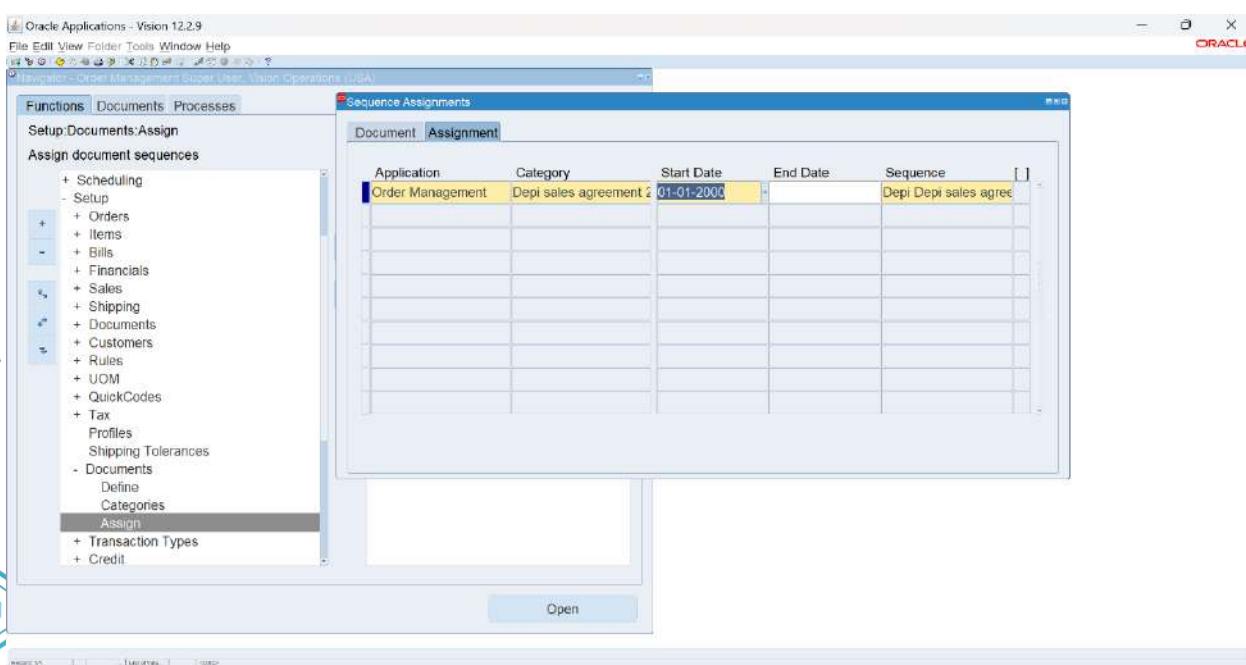
The screenshot shows the 'Transaction Types' screen in Oracle Applications. A new transaction type 'Dept sales agreement 24' is being defined. The 'Description' field contains 'Dept sales agreement 24'. Other fields include 'Order Category' (Order), 'Fulfillment Flow' (Sales Agreement Flow -), 'Effective Dates' (01-01-2000 -), 'Layout Template', 'Contract Template', and several buttons for 'Approvals', 'Validate Workflow', and 'Assign Line Flows'. The left sidebar shows a tree view of setup functions like Documents, Processes, Setup, Transaction Types Define, and ONT transaction types.

- Define the quotes sequence
- Set up ->document -> define (enter name, application, etc.) then save
- Assign the sequence to transaction type
- Set up ->document -> Assign (enter sequences, ledger, date, etc.), then save

The screenshot shows the 'Document Sequences' screen in Oracle Applications. A new sequence 'Dept Dept sales /Order Management' is being defined under 'Dept sales /Order Management'. The 'Name' field is 'Dept Dept sales /Order Management', 'Application' is 'Order Management', 'From' is '01-01-2000', 'To' is blank, 'Type' is 'Automatic', and 'Initial Value' is empty. The left sidebar shows a tree view of setup functions like Documents, Processes, Setup, Document Sequences, and Define.



Sense the Future



- Create sales agreement
    - In header enter customer, sales agreement type /name, sales person and date
    - Enter the needed details in (main, shipping, accounting, pricing, fulfillment) tabs
  - Then save

Oracle Applications - Vision 12.2.9

Sales Agreement: Sales Agreements

**Main**

Customer	Avengers Electronic
Customer Number	11064
Customer PO	
Customer Contact	Mosafira Fahmy
Salesperson	Mosafira Fahmy
Activation Date	14-10-2024
Expiration Date	06-10-2025
Disallow New Releases	

**Shipping**

Line	Item Context	Item	UOM	Item Description	Activation Date	Expiry
1	Internal Item Num	PIR 005	Ea	Motion Sensors	14-10-2024	06-1
2	Internal Item Num	OPS 006	Ea	Proximity Sensors	14-10-2024	06-1
3	Internal Item Num	UDS 007	Ea	Distance Sensors	14-10-2024	06-1
4	Internal Item Num	MQ 008	Ea	Gas Sensors	14-10-2024	06-1
5	Internal Item Num	LIDAR 009	Ea	Proximity and Distance Sensors	14-10-2024	06-1
6	Internal Item Num	RGBD 010	Ea	Vision Sensors	14-10-2024	06-1

**Actions** **Contract Terms** **Price List Setup** **Submit Draft**

Oracle Applications - Vision 12.2.9

Sales Agreement: Sales Agreements

**Shipping**

Ship To Location	22833 CAIRO cairo, EG	Deliver To Location	
Warehouse	M1	Freight Terms	
Enforce Terms		Ship To	Freight Terms
			Shipping Method

**Main**

Line	Item Context	Item	UOM	Ship To Location	Enforce Ship To	Deliv.
1	Internal Item Num	PIR 005	Ea	22833	x	
2	Internal Item Num	OPS 006	Ea	22833	x	
3	Internal Item Num	UDS 007	Ea	22833	x	
4	Internal Item Num	MQ 008	Ea	22833	x	
5	Internal Item Num	LIDAR 009	Ea	22833	x	
6	Internal Item Num	RGBD 010	Ea	22833	x	

**Actions** **Contract Terms** **Price List Setup** **Submit Draft**

Oracle Applications - Vision 12.2.9

Sales Agreement: Sales Agreements

**Accounting**

Currency	USD	Bill To Location	22832 cairo, EG
Conversion type	Corporate	Accounting Rule	
Payment Term	N30	Invoicing Rule	
Enforce Terms			
Invoicing Rule		Bill To	Accounting Rule
Payment Term			

**Main**

Line	Item Context	Item	UOM	Bill To Location	Enforce Bill To	Paym.
1	Internal Item Num	PIR 005	Ea	22832	x	N30
2	Internal Item Num	OPS 006	Ea	22832	x	N30
3	Internal Item Num	UDS 007	Ea	22832	x	N30
4	Internal Item Num	MQ 008	Ea	22832	x	N30
5	Internal Item Num	LIDAR 009	Ea	22832	x	N30
6	Internal Item Num	RGBD 010	Ea	22832	x	N30

**Actions** **Contract Terms** **Price List Setup** **Submit Draft**

Oracle Applications - Vision 12.2.9

Sales Agreement (Vision Operations) - 3. Avengers Electronic

Functions Documents Processes

Sales Agreement: Sales Agreements

- + Orders, Returns
- + Negotiation
- Sales Agreement
  - Sales Agreements
- Sales Agreement Organizer
  - Pricing and Availability
- + Shipping
- + Customers
- + Scheduling
- + Setup
- + Reports, Requests
  - WF Notifications
- + Release Management
- + Inventory
- + Bills of Material
- + WIP
- + Receivables
- + Purchasing
- + Payables
- Change Organization

Main Shipping Accounting Pricing Fulfillment Acceptance

Price List DEPI PRICE LIST OCT 24 Enforce Price List

Create

New Modifier List  New Price List   
 Default Discount %   
 Default Discount Amount

Main Shipping Accounting Pricing Fulfillment Summary

Line	Item Context	Item	UOM	Price List	Unit List Price	Pricing UOM
1	Internal Item Num	PIR 005	Ea	DEPI PRICE LIST		
2	Internal Item Num	OPS 006	Ea	DEPI PRICE LIST		
3	Internal Item Num	UDS 007	Ea	DEPI PRICE LIST		
4	Internal Item Num	MQ 008	Ea	DEPI PRICE LIST		
5	Internal Item Num	LIDAR 009	Ea	DEPI PRICE LIST		
6	Internal Item Num	RGBD 010	Ea	DEPI PRICE LIST		

Actions Contract Terms Price List Setup Submit Draft

Oracle Applications - Vision 12.2.9

Sales Agreement (Vision Operations) - 3. Avengers Electronic

Functions Documents Processes

Sales Agreement: Sales Agreements

- + Orders, Returns
- + Negotiation
- Sales Agreement
  - Sales Agreements
- Sales Agreement Organizer
  - Pricing and Availability
- + Shipping
- + Customers
- + Scheduling
- + Setup
- + Reports, Requests
  - WF Notifications
- + Release Management
- + Inventory
- + Bills of Material
- + WIP
- + Receivables
- + Purchasing
- + Payables
- Change Organization

Main Shipping Accounting Pricing Fulfillment Acceptance

Min Amount Agreed 100,000.00 Allow Override Max Amount  
 Max Amount Agreed 1,000,000.00

Summary

Line	Item Context	Item	UOM	Min Amount Agreed	Max Amount Agreed
1	Internal Item Num	PIR 005	Ea	20,000.00	50,000
2	Internal Item Num	OPS 006	Ea	20,000.00	50,000
3	Internal Item Num	UDS 007	Ea	20,000.00	50,000
4	Internal Item Num	MQ 008	Ea	20,000.00	50,000
5	Internal Item Num	LIDAR 009	Ea	20,000.00	50,000
6	Internal Item Num	RGBD 010	Ea	20,000.00	50,000

Actions Contract Terms Price List Setup Submit Draft

Oracle Applications - Vision 12.2.9

Sales Agreement (Vision Operations) - 3. Avengers Electronic

Functions Documents Processes

Sales Agreement: Sales Agreements

- + Orders, Returns
- + Negotiation
- Sales Agreement
  - Sales Agreements
- Sales Agreement Organizer
  - Pricing and Availability
- + Shipping
- + Customers
- + Scheduling
- + Setup
- + Reports, Requests
  - WF Notifications
- + Release Management
- + Inventory
- + Bills of Material
- + WIP
- + Receivables
- + Purchasing
- + Payables
- Change Organization

Main Shipping Accounting Pricing Fulfillment Acceptance

Customer: Avengers Electronic	Sales Agreement Number: 3
Customer Number: 11084	Sales Agreement Type: Depi sales agreement
Customer PO:	Sales Agreement Name: Depi sales agreement
Customer Contact:	Contract Template:
Salesperson: Mostafa fahmey,	User Status:
Activation Date: 14-10-2024	Status: Draft
Expiration Date: 06-10-2025	Version Number: 3
Disallow New Releases: <input checked="" type="checkbox"/>	

Main Shipping Accounting Pricing Fulfillment Summary

Line	Item Context	Item	UOM	Item Description	Activation Date	Expir.
1	Internal Item Num	PIR 005	Ea	Motion Sensors	14-10-2024	06-1
2	Internal Item Num	OPS 006	Ea	Proximity Sensors	14-10-2024	06-1
3	Internal Item Num	UDS 007	Ea	Distance Sensors	14-10-2024	06-1
4	Internal Item Num	MQ 008	Ea	Gas Sensors	14-10-2024	06-1
5	Internal Item Num	LIDAR 009	Ea	Proximity and Distance Sensors	14-10-2024	06-1
6	Internal Item Num	RGBD 010	Ea	Vision Sensors	14-10-2024	06-1

Actions Contract Terms Price List Setup Submit Draft

Oracle Applications - Vision 12.2.9

Sales Agreement (Vision Operations) - 3, Avengers Electronic

**Main**

Customer	Avengers Electronic	Sales Agreement Number	3
Customer Number	11084	Sales Agreement Type	Depi sales agreement 2
Customer PO		Sales Agreement Name	Depi sales agreement 2
Customer Contact		Contract Template	
Salesperson	Mostafa fahmey.	User Status	
Activation Date	14-10-2024	Status	Active
Expiration Date	06-10-2025	Version Number	3
Disallow New Releases			

**Summary**

Line	Item Context	Item	UOM	Item Description	Activation Date	Expir.
1	Internal Item Num:PIR 005	Ea	Motion Sensors	14-10-2024	06-1	
2	Internal Item Num:OPS 006	Ea	Proximity Sensors	14-10-2024	06-1	
3	Internal Item Num:UDS 007	Ea	Distance Sensors	14-10-2024	06-1	
4	Internal Item Num:MQ 008	Ea	Gas Sensors	14-10-2024	06-1	
5	Internal Item Num:LIDAR 009	Ea	Proximity and Distance Sensors	14-10-2024	06-1	
6	Internal Item Num:RGBD 010	Ea	Vision Sensors	14-10-2024	06-1	

**Actions**

Contract Terms

Price List Setup

Submit Draft

Oracle Applications - Vision 12.2.9

Sales Agreement (Vision Operations) - 3, Avengers Electronic

**Main**

Customer	Avengers Electronic	Sales Agreement Number	3
Customer Number	11084	Sales Agreement Type	Depi sales agreement 2
Customer PO		Sales Agreement Name	Depi sales agreement 2
Customer Contact		Contract Template	
Salesperson	Mostafa fahmey.	User Status	
Activation Date	14-10-2024	Status	Pending Customer Acceptance
Expiration Date	06-10-2025	Version Number	3

**Actions**

- Find %
- Actions
- Capture Reason
- Contract Terms
- Copy Sales Agreement
- Customer Accepted**
- Customer Rejected
- Preview and Print
- Price List Setup

**Main**

Line	Item Context	Item	UOM	Item Description	Activation Date	Expir.
1	Internal Item Num:PIR 005	Ea	Motion Sensors	14-10-2024	06-1	
2	Internal Item Num:OPS 006	Ea	Proximity Sensors	14-10-2024	06-1	
3	Internal Item Num:UDS 007	Ea	Distance Sensors	14-10-2024	06-1	
4	Internal Item Num:MQ 008	Ea	Gas Sensors	14-10-2024	06-1	
5	Internal Item Num:LIDAR 009	Ea	Proximity and Distance Sensors	14-10-2024	06-1	
6	Internal Item Num:RGBD 010	Ea	Vision Sensors	14-10-2024	06-1	

**Actions**

Contract Terms

Price List Setup

Submit Draft

Oracle Applications - Vision 12.2.9

Sales Agreement (Vision Operations) - 3, Avengers Electronic

**Main**

Customer	Avengers Electronic	Sales Agreement Number	3
Customer Number	11084	Sales Agreement Type	Depi sales agreement 2
Customer PO		Sales Agreement Name	Depi sales agreement 2
Customer Contact		Contract Template	
Salesperson	Mostafa fahmey.	User Status	
Activation Date	14-10-2024	Status	Pending Customer Acceptance
Expiration Date	06-10-2025	Version Number	3

**Summary**

Line	Item Context	Item	UOM	Item Description	Activation Date	Expir.
1	Internal Item Num:PIR 005	Ea	Motion Sensors	14-10-2024	06-1	
2	Internal Item Num:OPS 006	Ea	Proximity Sensors	14-10-2024	06-1	
3	Internal Item Num:UDS 007	Ea	Distance Sensors	14-10-2024	06-1	
4	Internal Item Num:MQ 008	Ea	Gas Sensors	14-10-2024	06-1	
5	Internal Item Num:LIDAR 009	Ea	Proximity and Distance Sensors	14-10-2024	06-1	
6	Internal Item Num:RGBD 010	Ea	Vision Sensors	14-10-2024	06-1	

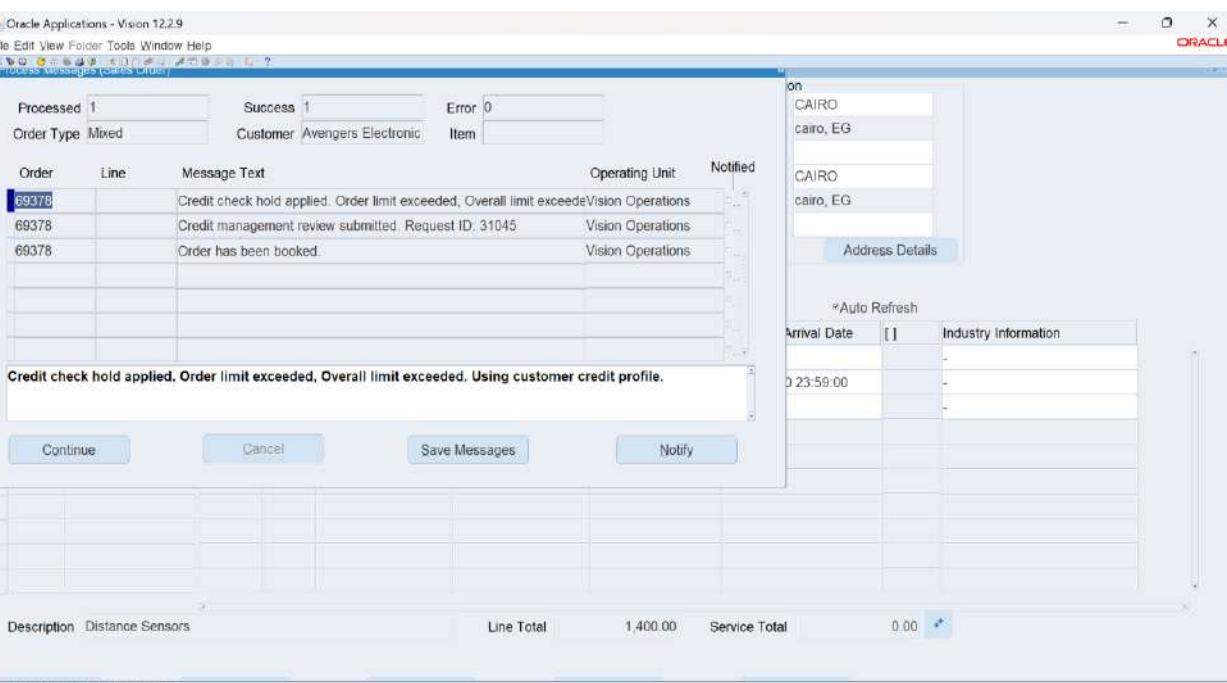
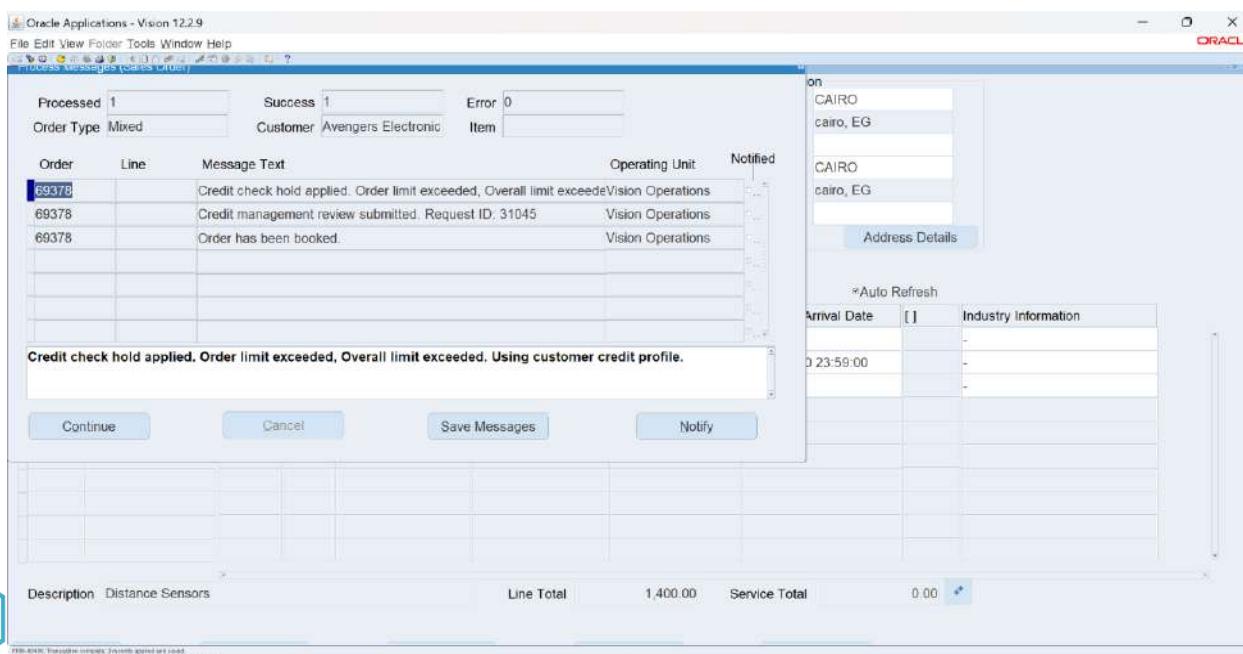
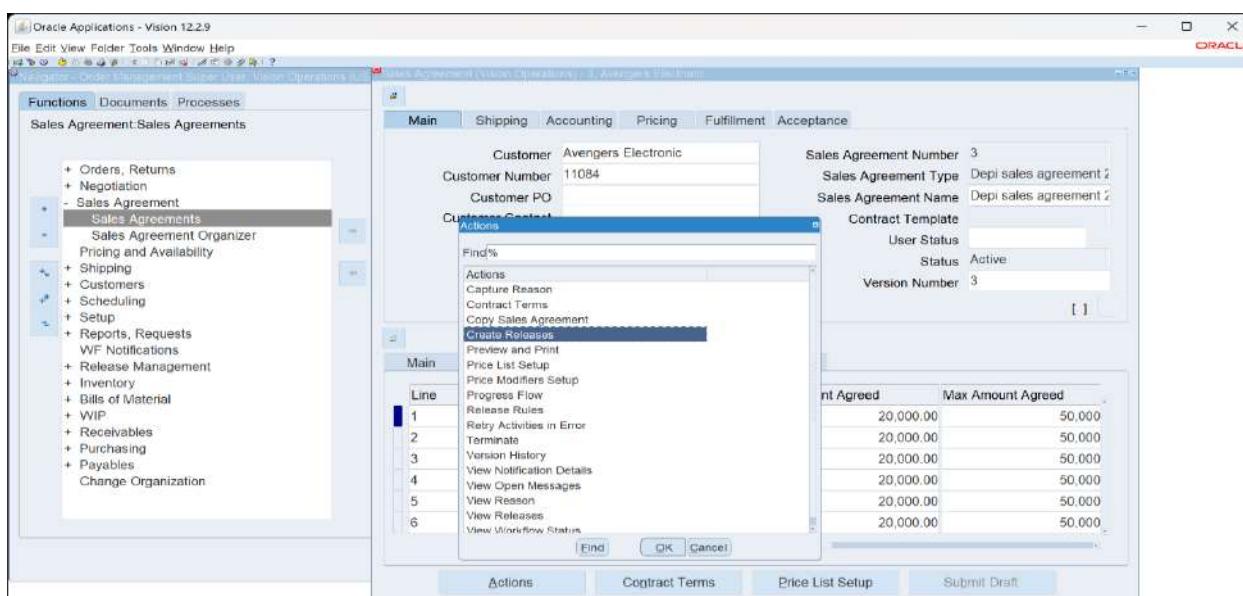
**Actions**

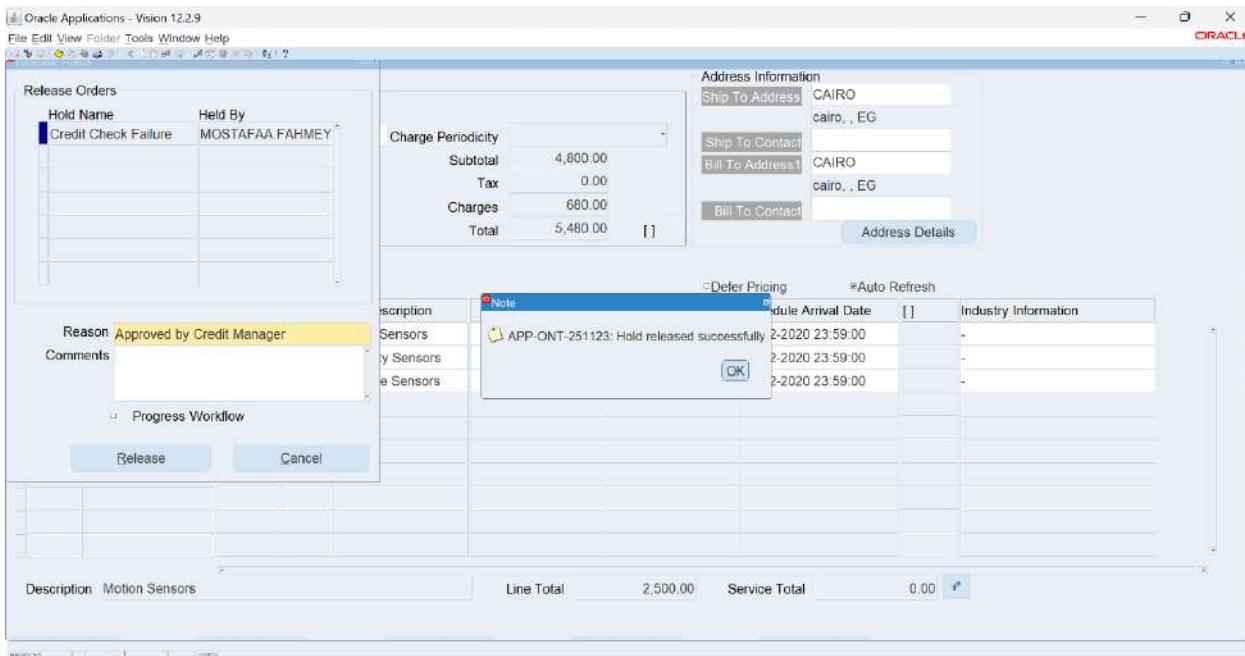
Contract Terms

Price List Setup

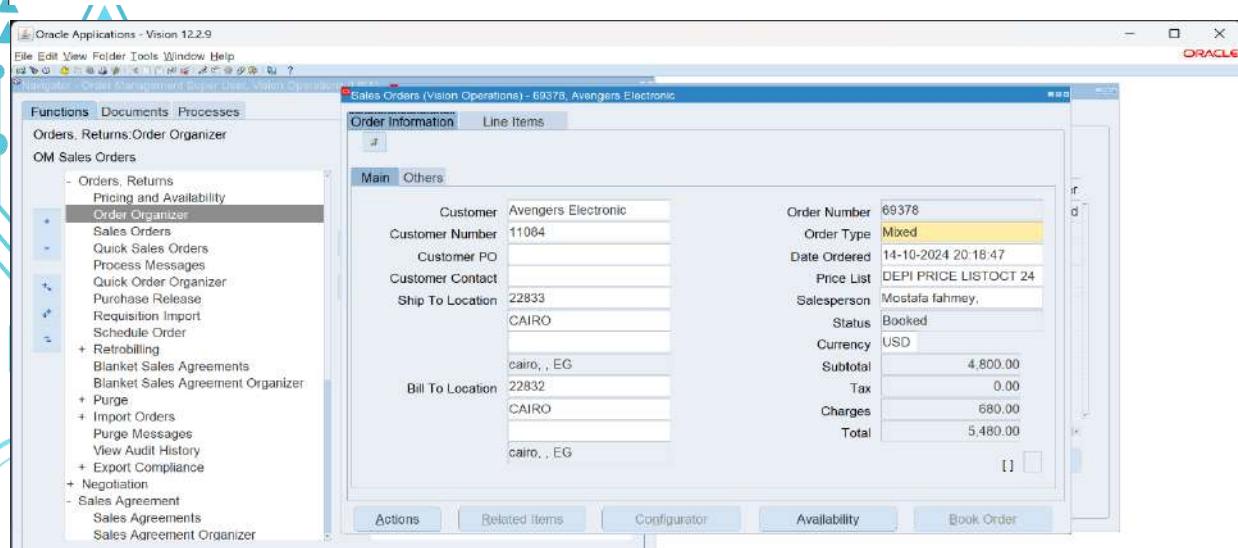
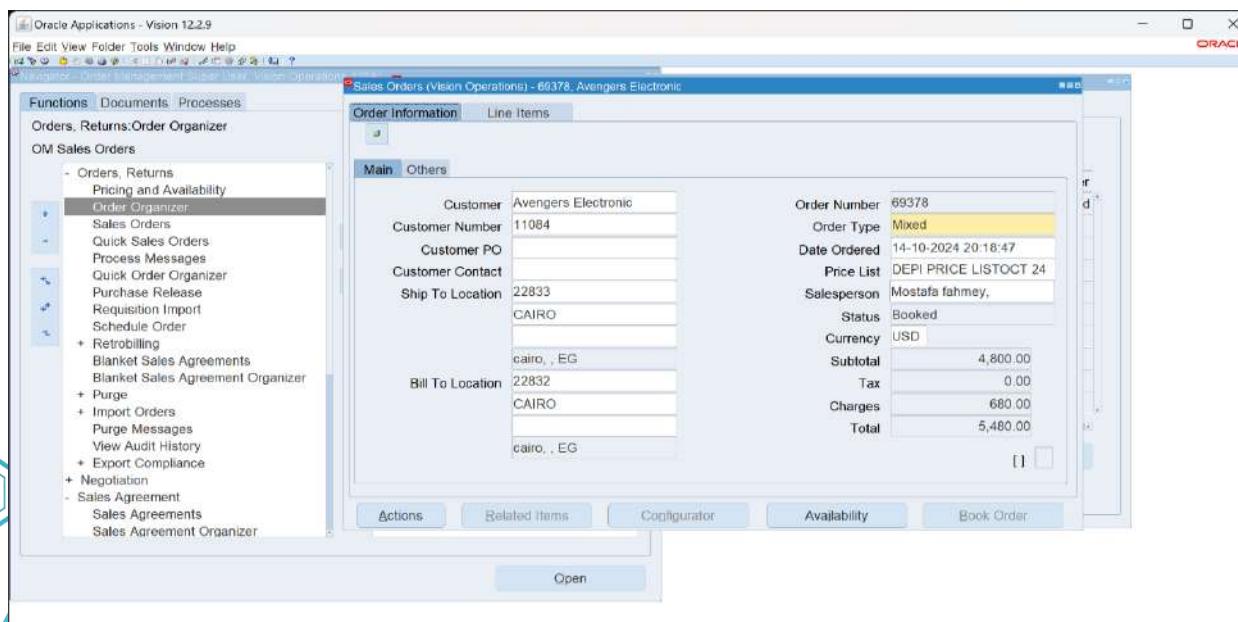
Submit Draft

- Create release: from action create release





- Order, returns ->order organizer, search for the order then find
- Displays sales order window



Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Sales Orders (Vision Operations) - 69378, Avengers Electronic

Functions Documents Processes

Orders, Returns:Order Organizer

OM Sales Orders

- Orders, Returns  
Pricing and Availability
- + Order Organizer
- Sales Orders
- Quick Sales Orders
- Process Messages
- Quick Order Organizer
- Purchase Release
- Requisition Import
- Schedule Order
- + Retrobilling
- Blanket Sales Agreements
- Blanket Sales Agreement Organizer
- + Purge
- + Import Orders
- Purge Messages
- View Audit History
- + Export Compliance
- + Negotiation
- Sales Agreement
- Sales Agreements
- Sales Agreement Organizer

Order Information Line Items

Main Pricing Shipping Addresses Returns Services Others

Line Ordered Item Qty UOM Unit Selling Price Request Date Schedule Ship Date S

1.1	PIR 005	50	Ea	50.00	14-10-2024 20:18:47	31-12-2020 23:59:00	A
2.1	OPS 006	15	Ea	60.00	14-10-2024 20:18:47	31-12-2020 23:59:00	A
3.1	UDS 007	20	Ea	70.00	14-10-2024 20:18:47	31-12-2020 23:59:00	A

Line Total 2,500.00 Line Qty 50 Service Total 0.00

Description Motion Sensors

Actions Related Items Configurator Availability Book Order

Open

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Sales Orders (Vision Operations) - 69378, Avengers Electronic

Functions Documents Processes

Orders, Returns:Order Organizer

OM Sales Orders

- Orders, Returns  
Pricing and Availability
- + Order Organizer
- Sales Orders
- Quick Sales Orders
- Process Messages
- Quick Order Organizer
- Purchase Release
- Requisition Import
- Schedule Order
- + Retrobilling
- Blanket Sales Agreements
- Blanket Sales Agreement Organizer
- + Purge
- + Import Orders
- Purge Messages
- View Audit History
- + Export Compliance
- + Negotiation
- Sales Agreement
- Sales Agreements
- Sales Agreement Organizer

Order Information Line Items

Main Pricing Shipping Addresses Returns Services Others

Line Ordered Item Qty UOM Unit Selling Price Request Date Schedule Ship Date S

1.1	PIR 005	50	Ea	50.00	14-10-2024 20:18:47	31-12-2020 23:59:00	A
2.1	OPS 006	15	Ea	60.00	14-10-2024 20:18:47	31-12-2020 23:59:00	A
3.1	UDS 007	20	Ea	70.00	14-10-2024 20:18:47	31-12-2020 23:59:00	A

Line Total 2,500.00 Line Qty 50 Service Total 0.00

Description Motion Sensors

Actions Related Items Configurator Availability Book Order

Open

- Order management super user -> Shipping -> Transactions
- Shipping transaction displays order details

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Shipping Transactions (Vision Operations) - 69378, Avengers Electronic

Functions Documents Processes

Shipping Transactions Form

- + Orders, Returns
- + Negotiation
- + Sales Agreement  
Pricing and Availability
- Shipping
- + Release Sales Orders
- + Transactions
- Quick Ship
- Exceptions
- + Interfaces
- Reports and Documents
- + Setup
- Change Organization
- Auto-Pack Deliveries SRS
- Ship Confirm Deliveries SRS
- Process Deliveries SRS
- Purge SRS
- + Customers
- + Scheduling
- + Setup
- + Reports, Requests
- WFO Notifications

Shipping Transactions

Query Query <1> Context Line - 6251052

Detail LPN Item Name Delivery Line Status Next Step Exceptions Order Requested Qty

6251051	PIR 005			Ready to Release	Pick Release		69378	
6251052	OPS 006			Ready to Release	Pick Release		69378	
6251053	UDS 007			Ready to Release	Pick Release		69378	

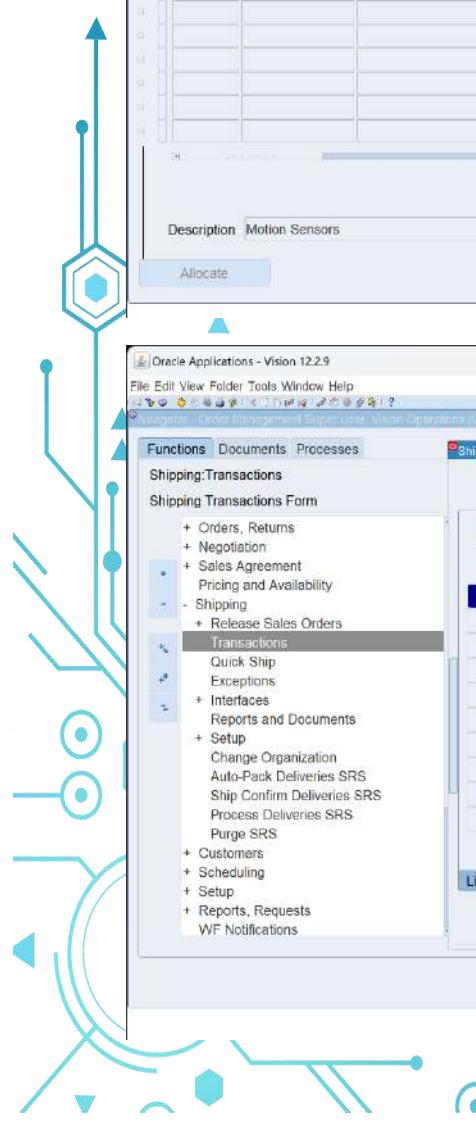
Lines/LPNs Delivery Path by Stop Path by Trip

Auto-pack Pick and Ship Actions Unpack Go Detail...

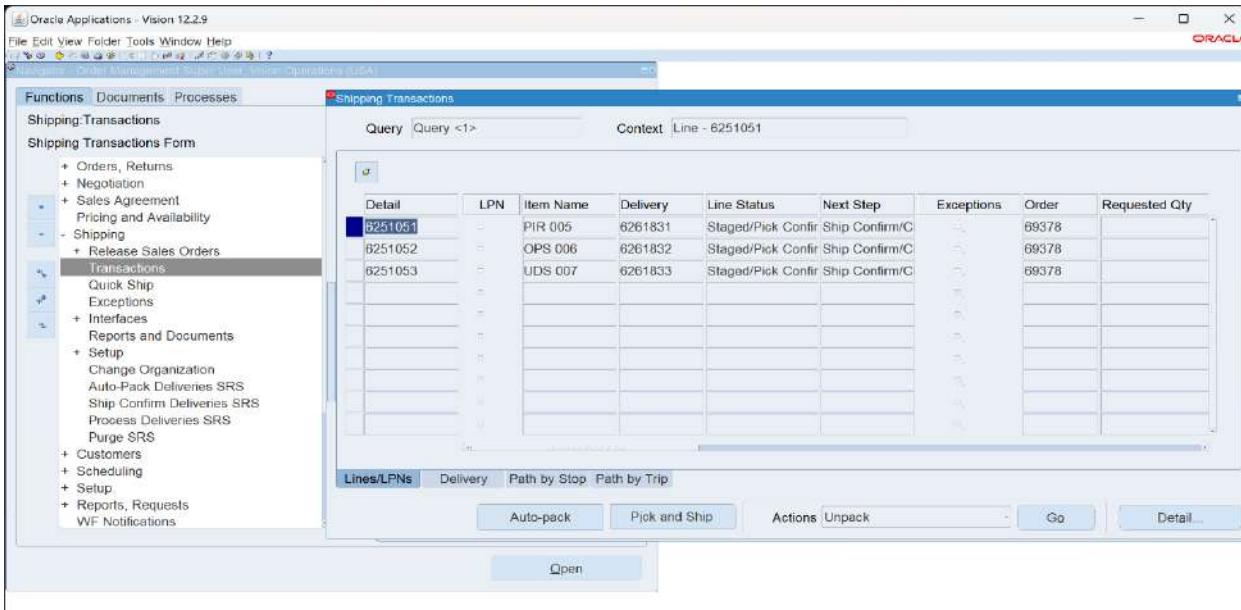
Open



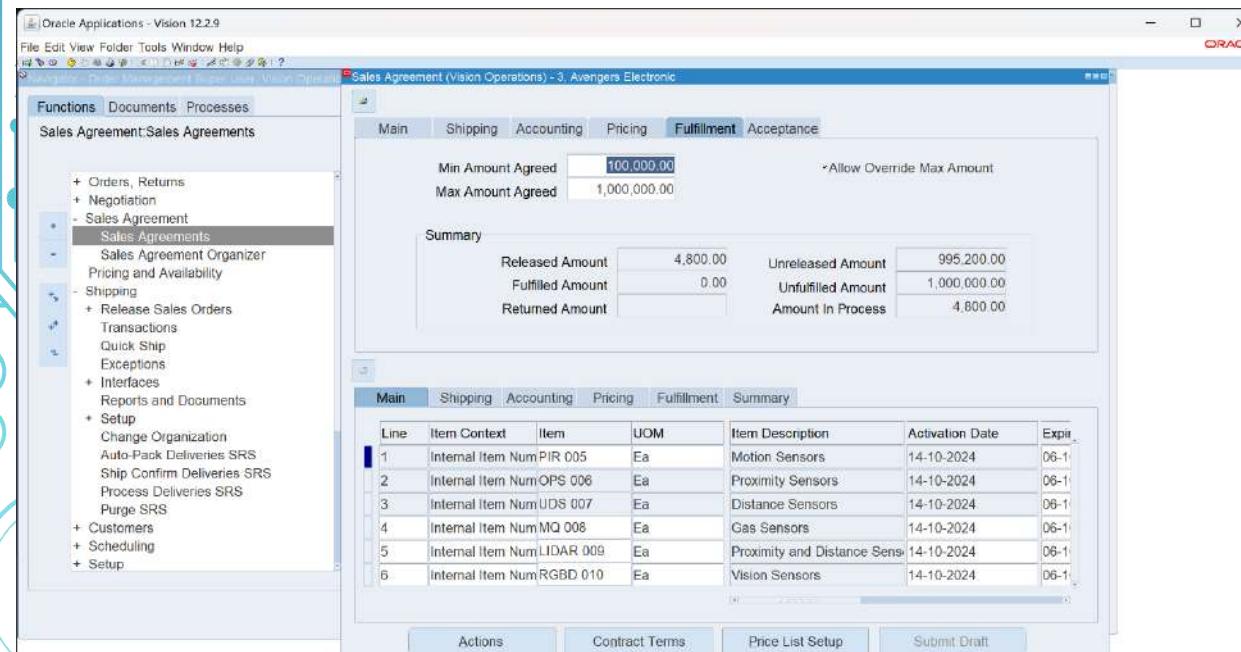
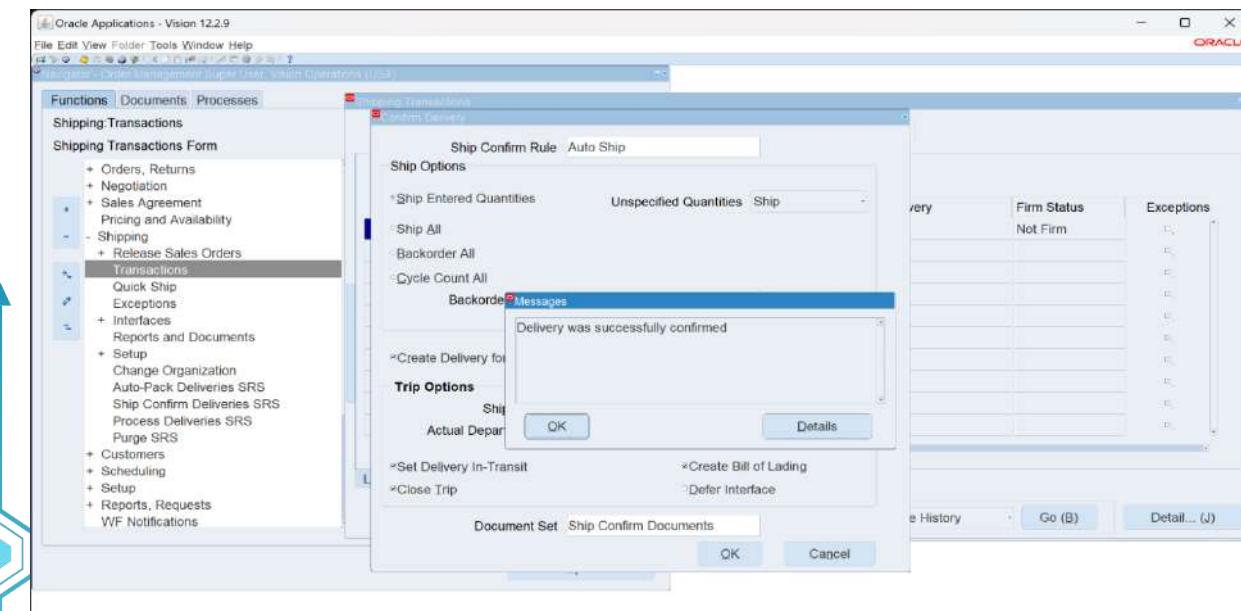
Sense the Future



The screenshot shows the Oracle Applications - Vision 12.2.9 interface. The top menu bar includes File, Edit, View, Folder, Tools, Window, Help, and Oracle Database. The title bar reads "Shipping:Transactions Super User: Vision Operations (LineA)". The left sidebar under "Shipping:Transactions" has a tree view with nodes like "Shipping:Transactions Form", "Orders, Returns", "Negotiation", "Sales Agreement", "Pricing and Availability", "Shipping", "Release Sales Orders", "Transactions" (which is selected), "Quick Ship", "Exceptions", "Interfaces", "Reports and Documents", "Setup", "Change Organization", "Auto-Pack Deliveries SRS", "Ship Confirm Deliveries SRS", "Process Deliveries SRS", "Purge SRS", "Customers", "Scheduling", "Setup", "Reports, Requests", and "WF Notifications". The main area is titled "Shipping Transactions" and shows a grid of shipping data. The columns are: Detail, LPN, Item Name, Delivery, Line Status, Next Step, Exceptions, Order, and Requested Qty. The data rows are: 6251051 (PIR 005, 6261831, Staged/Pick Confir, Ship Confirm/C, 69378), 6251052 (OPS 006, 6261832, Staged/Pick Confir, Ship Confirm/C, 69378), and 6251053 (UDS 007, 6261833, Staged/Pick Confir, Ship Confirm/C, 69378). At the bottom, there are tabs for Lines/LPNs, Delivery, Path by Stop, Path by Trip, and buttons for Auto-pack, Pick and Ship, Actions, Unpack, Open, Go, and Detail.



- Insert ship method then ok
  - A message confirming the delivery, click ok



Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Sales Agreement (Vision Operations) - 3, Avengers Electronic

Functions Documents Processes

Sales Agreement:Sales Agreements

- + Orders, Returns
- + Negotiation
- Sales Agreement
- + Sales Agreements
- Sales Agreement Organizer
- Pricing and Availability
- Shipping
- + Release Sales Orders
- Transactions
- Quick Ship
- Exceptions
- + Interfaces
- Reports and Documents
- + Setup
- Change Organization
- Auto-Pack Delivers SRS
- Ship Confirm Deliveries SRS
- Process Deliveries SRS
- Purge SRS
- + Customers
- + Scheduling
- + Setup

Main Shipping Accounting Pricing Fulfillment Acceptance

Customer	Avengers Electronic
Customer Number	11084
Customer PO	
Customer Contact	Mostafa fahmey,
Salesperson	
Activation Date	14-10-2024
Expiration Date	06-10-2025
Disallow New Releases	
Sales Agreement Number	3
Sales Agreement Type	Depi sales agreement 2
Sales Agreement Name	Depi sales agreement 2
Contract Template	
User Status	
Status	Active
Version Number	3

Main Shipping Accounting Pricing Fulfillment Summary

Line	Item Context	Item	UOM	Released Quantity	Fulfilled Quantity	Returned Quantity
1	Internal Item Num	PIR 005	Ea	50	15	
2	Internal Item Num	OPS 006	Ea		15	
3	Internal Item Num	UDS 007	Ea		20	
4	Internal Item Num	MQ 008	Ea			
5	Internal Item Num	LIDAR 009	Ea			
6	Internal Item Num	RGBD 010	Ea			

Actions Contract Terms Price List Setup Submit Draft



## **15. Freight & Charges**



- Defining a freight and special charge list modifier
  - Oracle pricing manager -> pricing ->modifiers ->modifier set up
  - Enter name, modifier number, value
  - Click line qualified, enter details
  - Then save

**Advanced Pricing - Define Modifier**

<b>Main</b>		<b>Advanced</b>	<b>Other</b>																																				
Type: Freight and Special charge Line Name: DEPI Freight Version: Currency: USD		Number: DEPI 2024 <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Automatic <input type="checkbox"/> Global Operating Unit: Vision Operations	Start Date: [ ] Description: [ ]																																				
		<a href="#">List Limits</a>	<a href="#">List Qualifiers</a>																																				
<ul style="list-style-type: none"> <li><a href="#">Modifiers Summary</a></li> <li><a href="#">Discounts/Charges</a></li> <li><a href="#">Promotion Upgrades</a></li> <li><a href="#">Promotion Terms</a></li> <li><a href="#">Coupons</a></li> <li><a href="#">Price Breaks*</a></li> </ul> <table border="1"> <thead> <tr> <th>Modifier No</th> <th>Level</th> <th>Modifier Type</th> <th>Formula</th> <th>Application Method</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>302304</td> <td>Line</td> <td>Freight/Special</td> <td></td> <td>Amount</td> <td>10</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Modifier No	Level	Modifier Type	Formula	Application Method	Value	302304	Line	Freight/Special		Amount	10																								
Modifier No	Level	Modifier Type	Formula	Application Method	Value																																		
302304	Line	Freight/Special		Amount	10																																		
<a href="#">Line Limits</a> <a href="#">Exclude</a> <a href="#">Pricing Attributes</a> <a href="#">Line Qualifiers</a> <a href="#">Define Details*</a>																																							
<a href="#">Open</a>																																							

The screenshot shows the 'Advanced Pricing - Define Modifier' dialog box. The 'Main' tab is selected. In the 'Create Modifier' section, the 'Type' is set to 'Freight and Special charge Line Item'. The 'Name' is 'DEPI Freight', and the 'Number' is 'DEPI 2024'. The 'Active' and 'Automatic' checkboxes are checked. The 'Operating Unit' is 'Vision Operations'. The 'Currency' is 'USD'. The 'Version' field is empty. A red box highlights the 'Qualifiers' button. Below the 'Modifiers Summary' table, there is a table for 'Qualifier - Header Level Qualifiers' with columns: Group, Grouping Number, Qualifier Context, Qualifier Attribute, and Applies To. The first row has 'Group' as '1', 'Grouping Number' as '-1', 'Qualifier Context' as 'Order', and 'Qualifier Attribute' as 'Order Type'. The 'Modifiers Summary' table shows one row with 'Modifier No' as '302304' and 'Line Item' as 'Line 1'. At the bottom, there are buttons for 'Cancel', 'OK', and 'Copy Group'. Below the main table, there are buttons for 'Line Limits', 'Exclude', 'Pricing Attributes', 'Line Qualifiers', and 'Define Details\*'. An 'Open' button is also present.

- Create sales order: (order management super user ->orders, returns -> sales order)
  - Save
  - From action -> charges and freight costs to view the charger

The screenshot shows the Oracle Order Entry application interface. The main window displays the 'Order Information' tab, with tabs for 'Main', 'Pricing', 'Shipping', 'Addresses', and 'Ref'. Below these tabs is a table with columns: Line, Ordered Item, Qty, UOM, and Unit S. A single row is selected, showing Line 1.1 with Ordered Item RRD-0001, Qty 120, and UOM Ea. At the bottom left, there are buttons for 'Actions', 'Related Items', and 'Configure'. The 'Line Total' is listed as 3,600.00.

A modal dialog box titled 'Charges and Freight Costs (Vision Operations) - Order - 69428 Line 1.1' is open over the main window. This dialog has tabs for 'Charges' and 'Freight Costs', with 'Charges' currently selected. It contains fields for 'Quantity' (120), 'List Price' (30.00), 'UOM' (Ea), and 'Shipping Method' (DHL). The 'Charges' table lists one item:

Charge Name	Type	Rate (%)	Amt / Unit	Charge	Invoiced Amount	Fixed
Freight Costs	FREIGHT		10.00	1,200.00		

At the bottom right of the dialog, there are buttons for 'Attributes', 'Apply', and 'Cancel', with 'Apply' being the active button.

## 16. Internal Sales Order

- Create requisition
- Purchasing super user (responsibility)->requisitions -> requisitions
- Enter requisition details, check the approval path, then approve

**Requisitions - 202430055**

Operating Unit	Vision Operations	Type	Internal Requisition	Preparer	Yusuf, Ms. Yousra
Number	202430055	Status	Incomplete	Total	USD 0.00
Description	IOT Sensors				

Lines    Source Details    Details    Currency

Num	Type	Item	Rev	Category	Description	UOM	C [ ]
1	Goods	OPS 006		DEPI.SENS	Proximity Sensors	Each	1
[ ]							

Destination Type: Inventory      Source: Inventory  
Requester: Yusuf, Ms. Yousra      Organization: Boston Manufacturing  
Organization: Seattle Manufacturing      Subinventory:  
Location: DEPI M1- Seattle Mfg  
Subinventory:

Outside Services      Catalog...      Distributions      Approve...

Open

**Approve Document - 202430055**

**Approval Details**    Additional Options

Encumbrance

Reserve     Unreserve  
 Use GL Override     Use Document GL Date to Unreserve    Unreserve Date: \_\_\_\_\_  
Accounting Date: \_\_\_\_\_

Approval

Submit for Approval     Forward  
Forward From: Yusuf, Ms. Yousra    Approval Path: \_\_\_\_\_  
Forward To: OMAIMA MOHAMED 2, \_\_\_\_\_

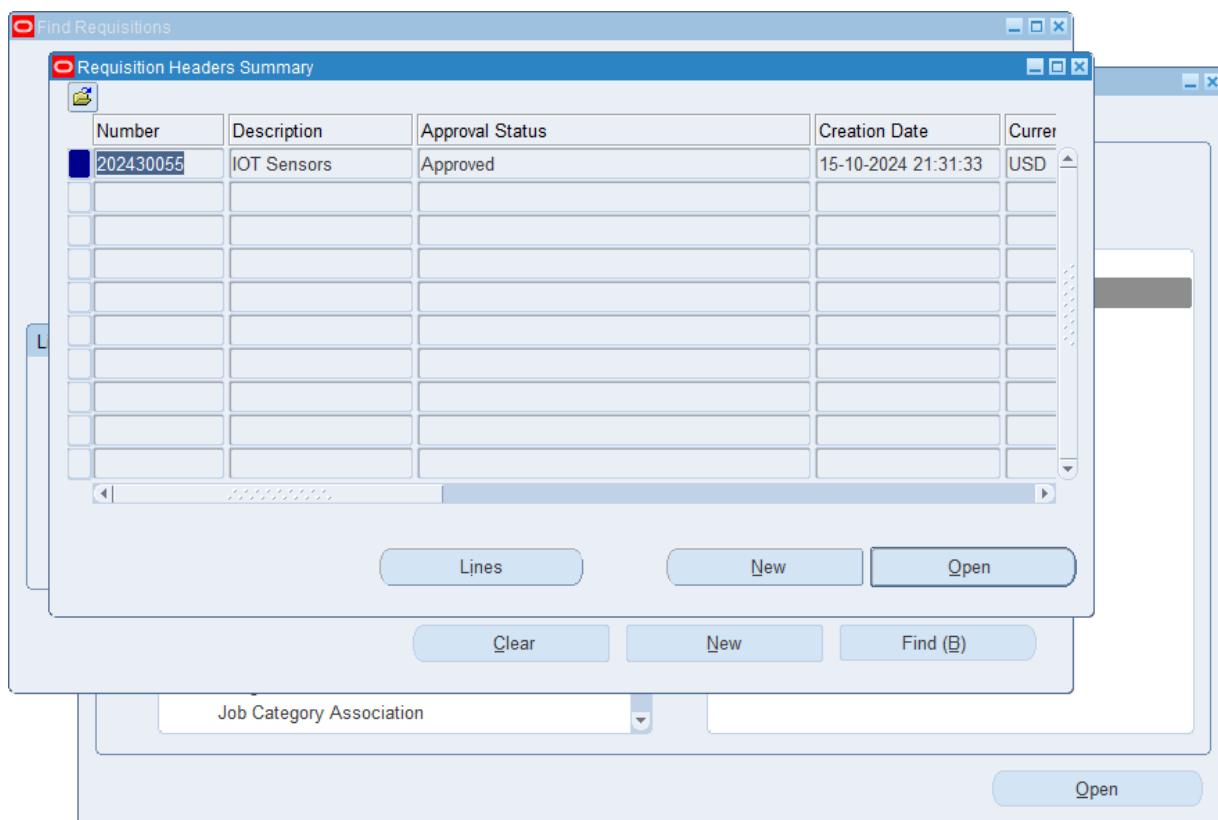
Note: \_\_\_\_\_  
Change Summary: \_\_\_\_\_

Transmission Methods

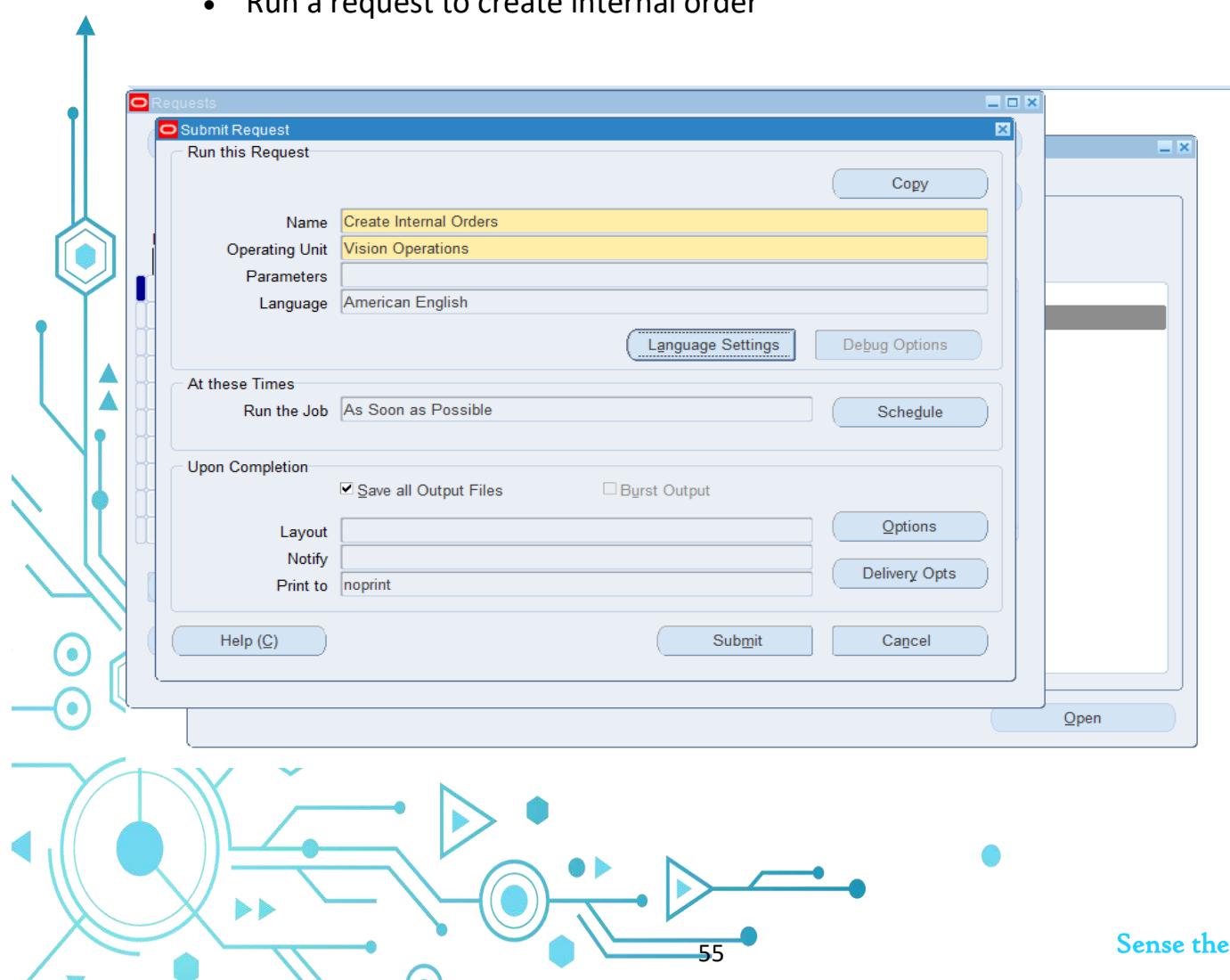
Print     XML  
 Fax     EDI  
 E-Mail    FAX Number: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

OK    Cancel    Open

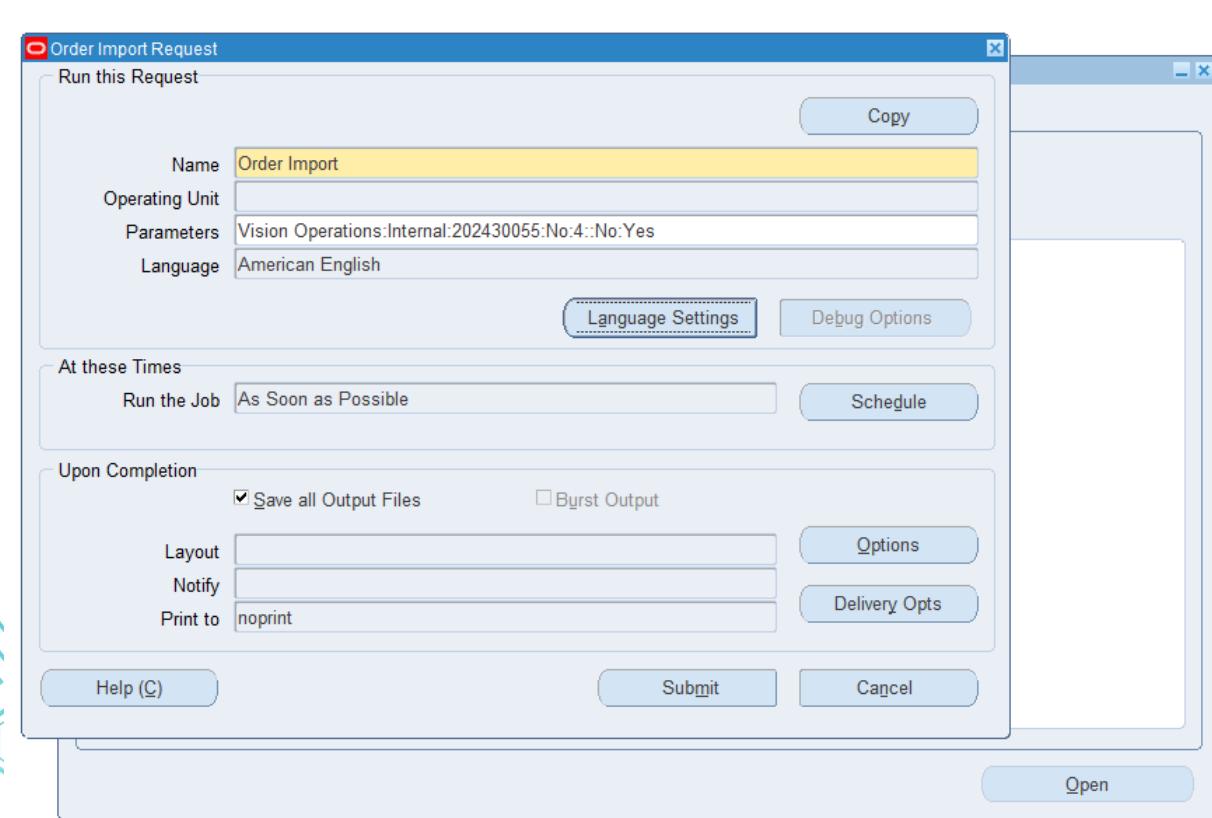
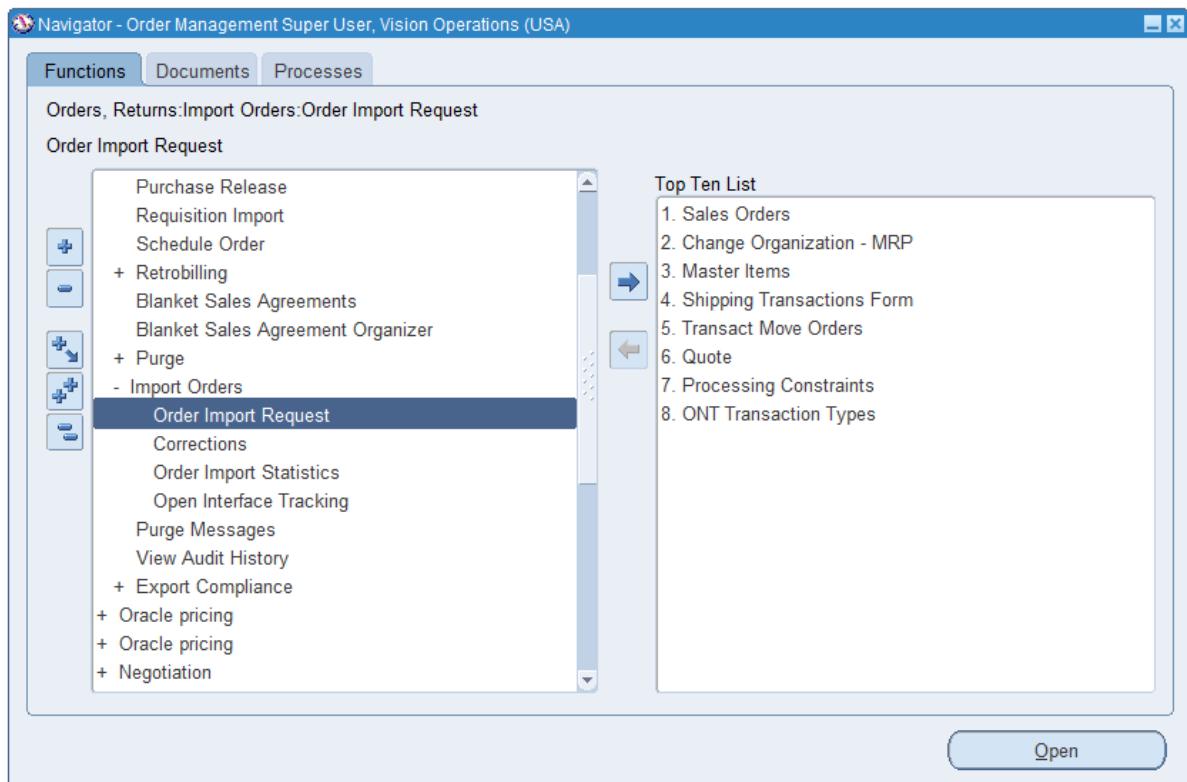
- check the requisition approval from requisition summary window



- Run a request to create internal order



- From orders, returns (menu)-> import orders ->orders import request
- Enter: operating unit, order reference, order source: internal
- Submit the request, confirm it is completed



- From orders, returns ->order organizer
- Enter the requisition number, then fined
- Confirm that the internal sales order was created

Sales Orders (Vision Operations) - [New]

**Order Information** **Line Items**

**Find Orders/Quotes**

Quote/Order Information		Line Information		Advanced		Holds Information		Scheduling	
Order Number		Quote Number		Credit Card Number		Ship To Location		Status	
Order Type									
Created By									
Customer PO									
Customer									
Salesperson									
Related PO Number									
Order Source									
Order Date									
To <input type="text"/>									
<b>Clear</b>		<b>New Quote</b>		<b>New Order</b>		<b>Find</b>			
<b>Actions</b>		<b>Related Items</b>		<b>Configurator</b>		<b>Availability</b>		<b>Book Order</b>	
<input type="button" value="+ Negotiation"/> <input type="button" value="Open"/>									

Order Organizer

Sales Orders (Vision Operations) - 69426, Avengers Electronic

**Order Information** **Line Items**

**Main** **Others**

Customer	Avengers Electronic	...	Order Number	69426	
Customer Number	53085		Order Type	Mixed	
Customer PO			Date Ordered	15-10-2024 21:31:33	
Customer Contact			Price List	DEPI Price List	
Ship To Location	65840		Salesperson	Yusuf Abdelghany	
	DEPI M1- Seattle Mfg		Status	Booked	
			Currency	USD	
			Subtotal	0.00	
Bill To Location	65838		Tax	0.00	
	DEPI M1- Seattle Mfg		Charges	0.00	
			Total	0.00	
			[ ]		
<b>Actions</b>		<b>Related Items</b>		<b>Configurator</b>	
				<b>Availability</b>	
				<b>Book Order</b>	
<b>Open</b>					

Sales Orders (Vision Operations) - 69426, Avengers Electronic

Order Information Line Items

Line	Ordered Item	Qty	UOM	Unit Seller
1.1	OPS 006	100	Ea	
Line Total 0.00 Line Qty				
Description Proximity Sensors				

Actions Related Items Configurator

Order Total 0.00

**Availability**

Ordered Item

Warehouse	M2
Request Date Qty	100
On Hand Qty	1000
Qty Reservable	1000
Primary UOM	Ea
Request Date	29-10-2024 00:00:00
Available Date	31-12-2020 23:59:00
Error Message	ATP not applicable
Substitute Item	
On Hand Ord Qty	1000
Ord Qty Reservable	1000

ATP Details Global Availability

+ Negotiation Open

- Shipping ->transaction
- Enter the field from /to order number then find
- From action choose launch pick release

Query Manager

Search for

- Trips
- Stops
- Deliveries
- Lines and LPNs
- LPNs
- Lines (B)

Saved Query

Name DEPI 07

Description

Owner YOUSRA.YUSUF

Share Query?

Lines

Source System Order Management

Consignee

Ship From

From Schedule Date

From Order Number 69426

Order Type

Assigned Lines

Item

From LPN

Shipment Priority

From Pick-Up Date

From Tracking Num

Org Code

Ship Method

Ship To

To Schedule Date

To Order Number 69426

Line Status Not Shipped

Assigned LPNs

Container Item

To LPN

Freight Terms

To Pick-Up Date

To Tracking Num

Open... Save Copy Delete... Clear Find... + Negotiation Open



Sense the Future

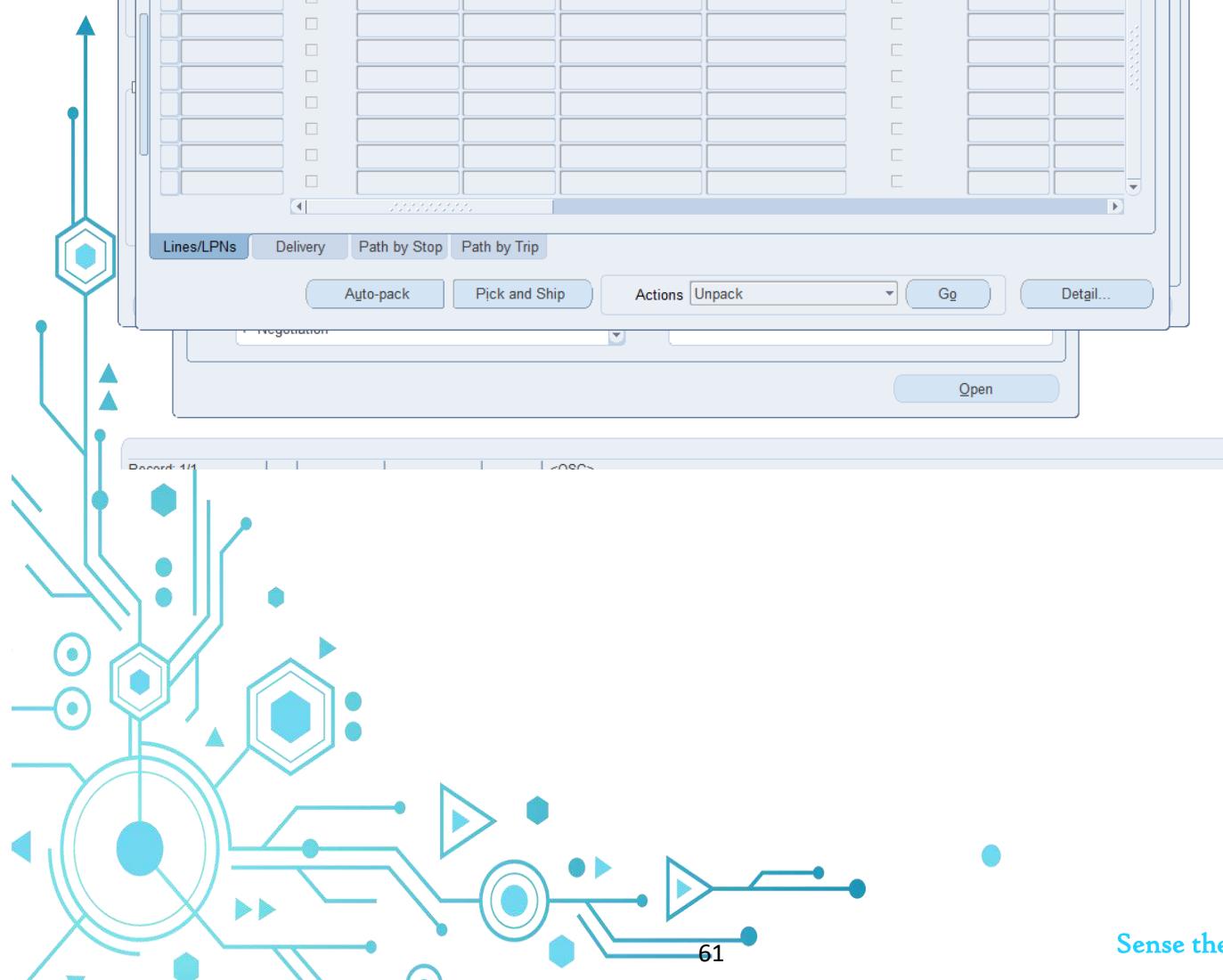
The screenshot shows the Shipping Transactions application window. At the top, there are two input fields: 'Query' containing 'DEPI 07' and 'Context' containing 'Line - 6256051'. Below these is a table with columns: Detail, LPN, Item Name, Delivery, Line Status, Next Step, Exceptions, Order, and Requested Qty. The 'Detail' column shows the value '6256051' for all rows. The 'LPN' column contains several checkboxes, none of which are checked. The 'Item Name' column contains 'OPS 006'. The 'Delivery' column is empty. The 'Line Status' column shows 'Ready to Release' and 'Pick Release' status. The 'Next Step' column is empty. The 'Exceptions' column is empty. The 'Order' column shows values like '60436' and '60437'. The 'Requested Qty' column is empty. A message dialog box titled 'Messages' is displayed in the center. It contains the text: 'Number of concurrent requests launched successfully: 1.' and 'Number of requests that failed: 0.' At the bottom of the dialog are 'OK' and 'Details' buttons.

The screenshot shows the 'Transact Move Orders (M2)' application window. At the top, there is a 'Transaction Date' input field. Below it, a 'Select' button is followed by a grid table with columns: Allocations, Number, Type, Line, Transaction Type, Item, Rev, and Source Sub. A red-bordered modal dialog titled 'Find Move Order Lines (M2)' is open over the grid. The dialog has tabs: Headers, Lines, Source and Destination, and Pick Wave, with 'Source and Destination' selected. It contains fields for 'Pick Slip Number' (disabled), 'Sales Order Number' (checked, value 69426), 'Order Type' (Mixed), and 'Order Source' (ORDER ENTRY). Buttons at the bottom of the dialog include OK, Cancel, Combinations, Clear, and Help.

- From shipping transaction window choose delivery tab choose action ship confirm
  - The delivery was succeeded



Sense the Future



# Sense the Future



Sense the Future

purchasing super user ->receiving -> receipts, search for the requisition number

- Select the line receipts, record the transaction, then save

**Find Expected Receipts (M1)**

<b>Supplier and Internal</b>	<b>Customer</b>
Operating Unit <input type="text" value="Vision Operations"/>	
Source Type <input type="button" value="Internal"/>	
Purchase Order <input type="text"/>	Release <input type="text"/>
Line <input type="text"/>	Shipment <input type="text"/>
Requisition <input type="text" value="202430055"/> ...	Shipment <input type="text"/>
Supplier <input type="text"/>	Supplier Site <input type="text"/>
Receiving Location <input type="text"/>	<input type="checkbox"/> Include Closed POs
<b>Item</b> <b>Date Ranges</b> <b>Shipments</b> <b>Destination</b>	
Item, Rev <input type="text"/>	<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 type="button" value="Find"/>	
<input type="button" value="Header"/> <input type="button" value="Open"/>	



**Receipts (M1)**

**Receipt Header (M1)**

<input checked="" type="radio"/> New Receipt	<input type="radio"/> Add To Receipt
Receipt	Receipt Date 15-10-2024 23:02:2
Shipment	Shipped Date
Packing Slip	Waybill/Airbill
Freight Carrier	Bill of Lading
Containers	Received By Yusuf, Ms. Yousra
Supplier	Boston Manufacturing
Comments	[ ]

**Operating Unit** Vision Operations      **Order Type** Internal Order  
**Supplier** Boston Manufacturing      **Order** 6258831  
**Item Description** Proximity Sensors      **Due Date** 15-10-2024 22:43:4  
**Destination** DEPI M1- Seattle Mfg-Yusuf, Ms. Yousra      **Hazard**  
**Header Receiver Note**  
**Shipment Receiver Note**

**Lot - Serial**      **Cascade**      **Express**      **Header**

**Open**

**Receiving Transactions (M1)**

Lines		Details		Order Information		Outside Services		Currency	
Secondary									
Quantity	UOM	Quantity	UOM	Location	Person	Subinventory		Locator	[ ]
100	Each				Yusuf, Ms. You	SENS 7	...		
<input checked="" type="checkbox"/> <input type="button" value="+"/> <input type="button" value="-"/>									
<input type="button" value="Lot-Serial"/> <input type="button" value="Cascade"/> <input type="button" value="Express"/> <input type="button" value="Inspect"/>									
<input type="button" value="Clear"/> <input type="button" value="Find"/> <input type="button" value="Open"/>									

Operating Unit: Vision Operations  
Supplier: Boston Manufacturing  
Description: Proximity Sensors  
Destination: Yusuf, Ms. Yousra---  
Header Receiver Note:  
Shipment Receiver Note:

Receipt: 23761  
Order: 6258831  
Parent Type: Receive  
Inspection: Not Inspected - Standard  
Current Location: DEPI M1- Seattle Mfg  
Hazard Class:

- Confirm the Quantity is Delivered Purchasing Super User -> Requisitions -> Requisition Summary
- giving confirmation that the Sales Order was shipped

**Find Receiving Transactions (M1)**

**Receipt Headers Summary (M1)**

**Receipt Transaction Summary (M1)**

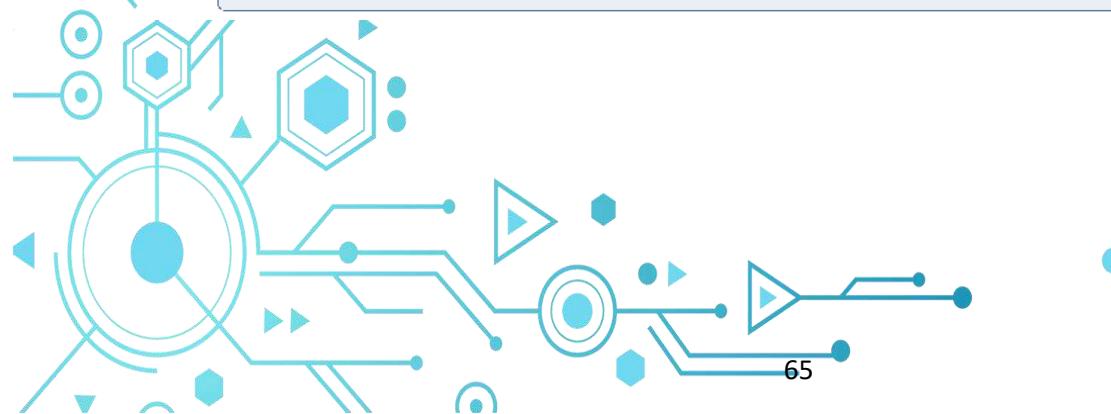
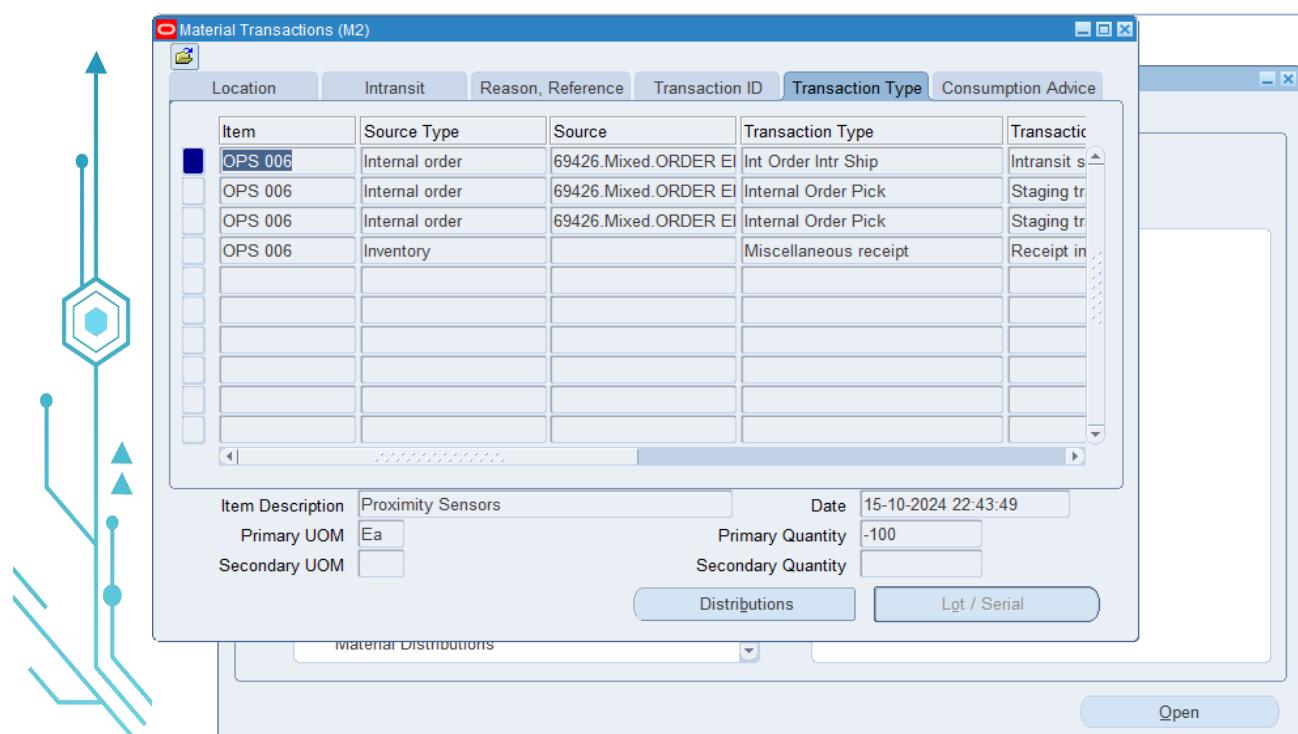
Transaction Type	Amount	Unit	Date	Item	Rev	Destination	Receipt
Receive	100	Each	15-10-2024	OPS 006		Receiving	23761
Deliver	100	Each	15-10-2024	OPS 006		Inventory	23761

Order Type: Requisition  
Source: Boston Manufacturing  
Description: Proximity Sensors  
Destination: Yusuf, Ms. Yousra---  
Header Receiver Note:  
Shipment Receiver Note:

Operating Unit: Vision Operations  
Order: 202430055  
Transaction Date: 15-10-2024 23:02:2  
Hazard:  
UN Number:  
Routing: Standard Receipt



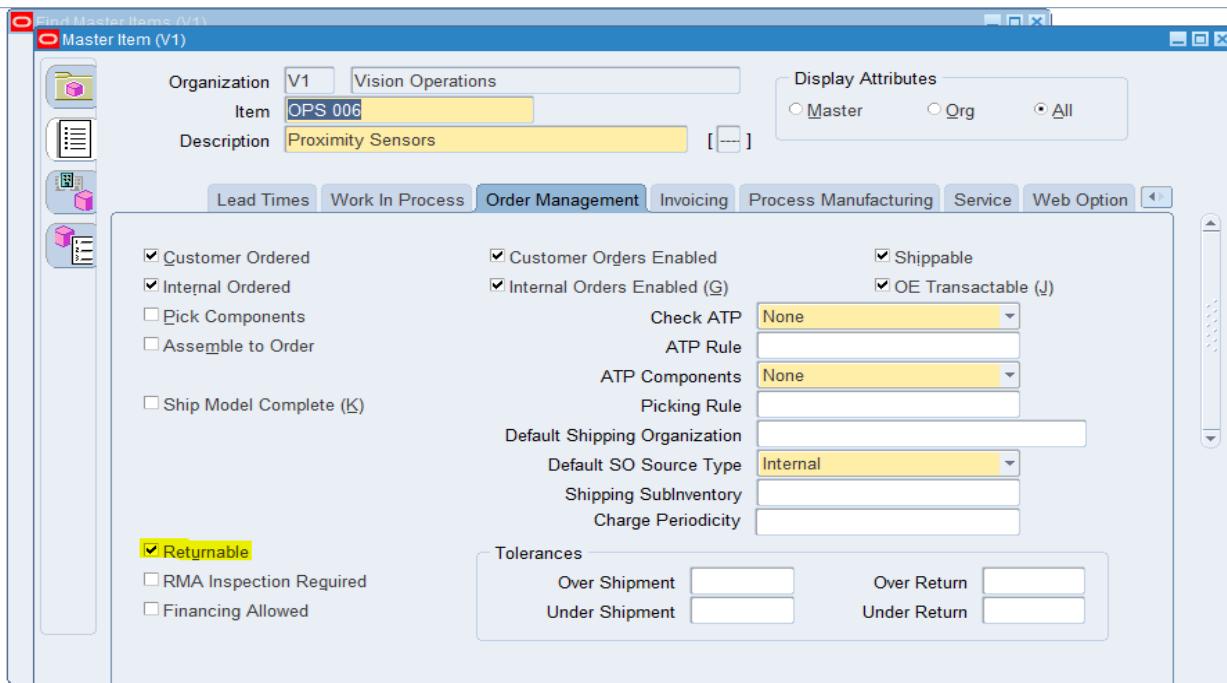
Sense the Future



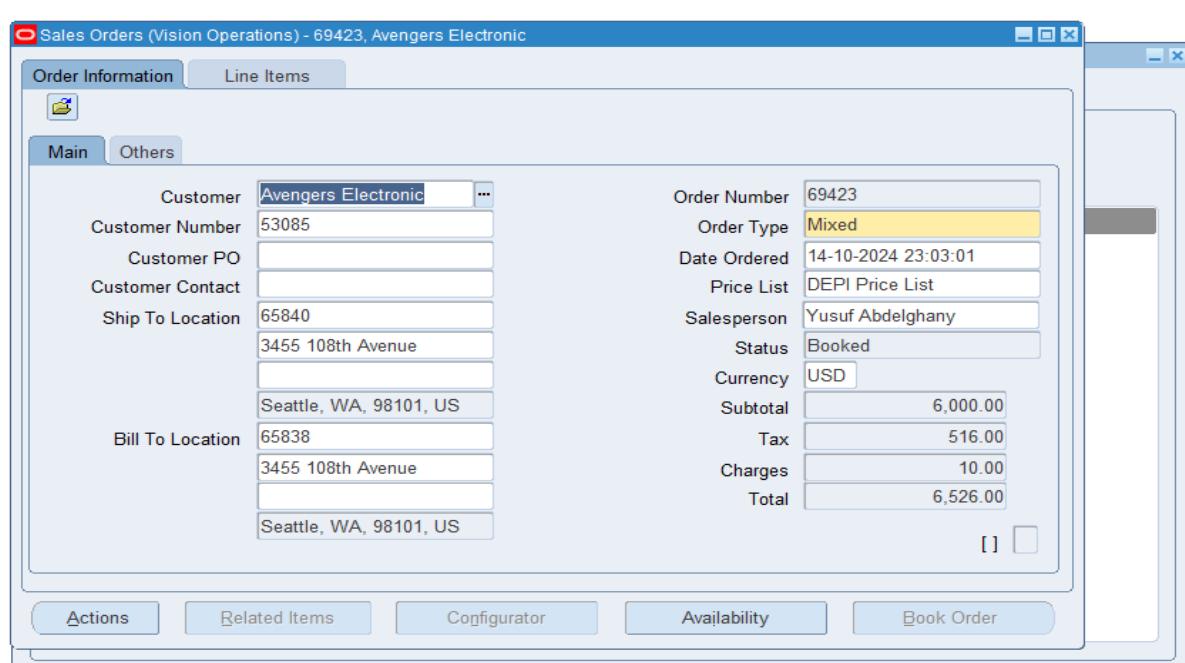
# Sense the Future

## 17. Return

- from master item window -> order management attribute ,enable :returnable then save



- Create sales order, from action select return
- Enter the return reasons



Sales Orders (Vision Operations) - 69423, Avengers Electronic

Order Information Line Items

Main Others

Customer	Avengers Electronic
Customer Number	53085
Customer PO	
Customer Contact	
Ship To Location	65840 3455 108th Avenue Seattle, WA, 98101, US
Bill To Location	65838 3455 108th Avenue Seattle, WA, 98101, US

Actions Related Items Configurator

**Copy**

Quick Copy Copy Header Copy Lines Pricing Options

Operating Unit: Vision Operations Source Version Number: 0

Create:  New Order  New Quote

Change Order Type To: New Order No: New Quote No:

Add Lines To:  Existing Order  Existing Quote

Display New Order After Copy No. of Copies: 1

OK Cancel Open

Sales Orders (Vision Operations) - 69423, Avengers Electronic

Order Information Line Items

Main Others

Customer	Avengers Electronic
Customer Number	53085
Customer PO	
Customer Contact	
Ship To Location	65840 3455 108th Avenue Seattle, WA, 98101, US
Bill To Location	65838 3455 108th Avenue Seattle, WA, 98101, US

Actions Related Items Configurator

**Copy**

Quick Copy Copy Header Copy Lines Pricing Options

Change Line Type To: Return (Receipt) Return Reason: Cancellation

Include Lines

- Descriptive Flex
- Sales Credits
- Attachments
- Fully Cancelled Lines
- Payments
- Holds
- Fulfillment Sets
- Ship / Arrival Sets
- User Defined Attributes

Version Reason: Comments: Action:  Default Missing Attributes  Copy Complete Configuration

OK Cancel Open

**Process Messages (Sales Order)**

Processed	1	Success	1	Error	0
Order Type	Mixed	Customer	Avengers Electronic	Item	OPS 006
Order	Line	Message Text	Operating Unit	Notified	<input type="checkbox"/>
69425	1.1	Order Header has been created successfully for the Order 69425	Vision Operations	<input type="checkbox"/>	
69425	1.1	Copy succeeded. The new order number is 69425.	Vision Operations	<input type="checkbox"/>	
Order Header has been created successfully for the Order 69425					

**Buttons:** Continue, Cancel, Save Messages, Notify

- Sales order (header) window for return (enter information on both header and line)
- In the main tab entered the order item quantity in return then enters the return reason.
- Book order

**Sales Orders (Vision Operations) - 69425, Avengers Electronic**

**Order Information**

<b>Main</b>	<b>Others</b>
Customer: Avengers Electronic	Order Number: 69425
Customer Number: 53085	Order Type: Mixed
Customer PO:	Date Ordered: 14-10-2024 23:56:53
Customer Contact:	Price List: DEPI Price List
Ship To Location: 65840	Salesperson: Yusuf Abdelghany
3455 108th Avenue	Status: Entered
Seattle, WA, 98101, US	Currency: USD
Bill To Location: 65838	Subtotal: <6,000.00>
3455 108th Avenue	Tax: <516.00>
Seattle, WA, 98101, US	Charges: 10.00
	Total: <6,506.00>

**Actions:** Actions, Related Items, Configurator, Availability, Book Order, Open

Sales Orders (Vision Operations) - 69425, Avengers Electronic

**Line Items**

Line	Ordered Item	Qty	Return Reason	Line Type	Reference	Order
1.1	OPS 006	-50	Cancellation	Return (Receipt)	Sales Order-69423	69423
Line Total <6,000.00> Line Qty -150 Service Total 0.00						
Description Proximity Sensors						
<input type="button" value="Actions"/> <input type="button" value="Related Items"/> <input type="button" value="Configurator"/> <input type="button" value="Availability"/> <input type="button" value="Book Order"/>						
<input type="button" value="Open"/>						

Sales Orders (Vision Operations) - 69425, Avengers Electronic

**Line Items**

Line	Ordered Item	Qty	Return Reason	Line Type	Reference	Order
1.1	OPS 006	-50	Cancellation	Return (Receipt)	Sales Order-69423	69423
Line Total <2,162.00>						
Description Proximity Sensors						
<input type="button" value="Actions"/> <input type="button" value="Related Items"/> <input type="button" value="Configurator"/> <input type="button" value="Availability"/> <input type="button" value="Book Order"/>						
<input type="button" value="Open"/>						

**Note**

Order has been booked.

- In find expected receipt widow
- Tab through the Header window to the Receipts Line window.
- Once you are in the Receipts Line window, the quantity will populate the window.
- Check the box next to the line you wish to receive, enter a Destination Type as Inventory and subinventory.
- Save this transaction and record the receipt number



Sense the Future

**Find Expected Receipts (M1)**

**Supplier and Internal**   **Customer**

RMA Num:  Line Num:

Line Type:  ...

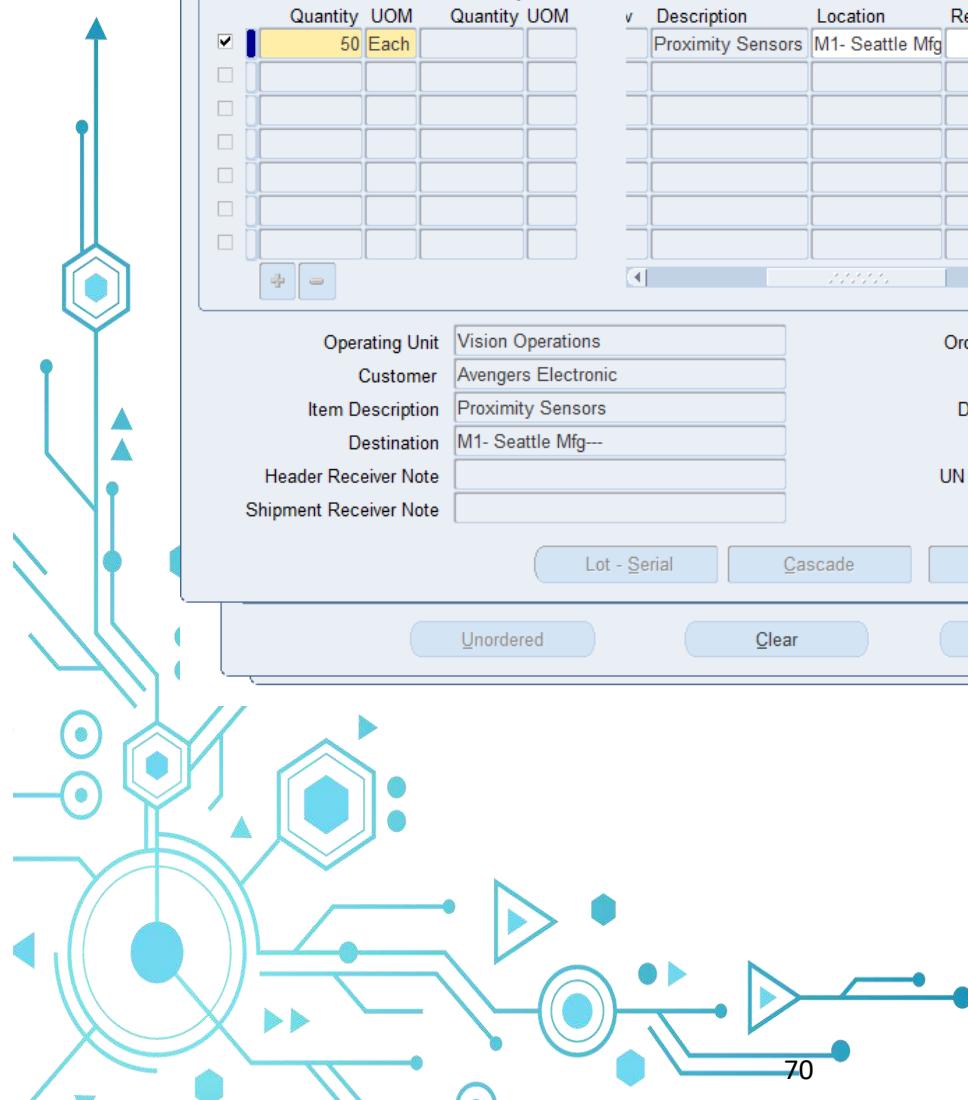
Customer:  Customer Num:  Customer Item Num:

**Item**   **Date Ranges**   **Shipments**

Item, Rev:   Category:

Description:  Supplier Item:

**Unordered**   **Clear**   **Find**   **Header**   **Open**



## Sense the Future

**Receipt Header (M1)**

<input checked="" type="radio"/> New Receipt	<input type="radio"/> Add To Receipt
Receipt <input type="text" value="23760"/>	Receipt Date <input type="text" value="15-10-2024 00:03:4"/>
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="Yusuf, Ms. Yousra"/>
Customer <input type="text" value="Avengers Electronic"/>	Comments <input type="text"/>

Customer Num  Customer Item Num

**Receipts**

- + Release Manager
- Inventory
  - + Inbound
  - Transactions
    - Receiving

**Items**

Item	Date Ranges	Shipments
<input type="text" value="Item, Rev"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Category"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Description"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Supplier Item"/>	<input type="text"/>	<input type="text"/>

- check the on-hand quantity of the item in Inventory to verify that correct quantity was received.
- Change responsibilities to Inventory and navigate to the Transactions > Material Transactions window.

**Find Material Transactions (M1)**

**Material Transactions (M1)**

Location	Intransit	Reason, Reference	Transaction ID	Transaction Type	Consumption Advice						
<input type="text" value="OPS 006"/>	<input type="text" value="RMA"/>	<input type="text" value="69425.Mixed.ORDER"/>	<input type="text" value="RMA Receipt"/>	<input type="text" value="Receipt into s"/>	<input type="text"/>						
<table border="1"> <tr> <td><input type="text" value="Item Description: Proximity Sensors"/></td> <td><input type="text" value="Date: 15-10-2024 00:03:41"/></td> </tr> <tr> <td><input type="text" value="Primary UOM: Ea"/></td> <td><input type="text" value="Primary Quantity: 50"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>						<input type="text" value="Item Description: Proximity Sensors"/>	<input type="text" value="Date: 15-10-2024 00:03:41"/>	<input type="text" value="Primary UOM: Ea"/>	<input type="text" value="Primary Quantity: 50"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Item Description: Proximity Sensors"/>	<input type="text" value="Date: 15-10-2024 00:03:41"/>										
<input type="text" value="Primary UOM: Ea"/>	<input type="text" value="Primary Quantity: 50"/>										
<input type="text"/>	<input type="text"/>										
<input type="button" value="Distributions"/> <input type="button" value="Lgt / Serial"/>											

**Open**

**Run AutoInvoice**

Run this Request

Name	Autoinvoice Master P
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

**Parameters**

Number of Instances	1
Organization	All
Invoice Source	Order Entry
Default Date	15-10-2024
Transaction Type	(Low) Bill To Customer Number (High) Bill To Customer Number (Low) Bill To Customer Name (High) Bill To Customer Name (Low) GL Date (High) GL Date (Low) Ship Date (High) Ship Date (Low) Transaction Number (High) Transaction Number (Low) Sales Order Number
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Clear"/> <input type="button" value="Help"/>	

Choices in list: 6 (Choices in full list: 75)

**Navigator - Order Management Super User, Vision Operations (USA)**

**Sales Orders**

- + Orders, Returns
- + Oracle pricing
- + Oracle pricing
- + Negotiation
- + Sales Agreement
- Pricing and Avail
- + Shipping
- + Customers
- + Scheduling
- + Setup
- + Reports, Reque
- WF Notification:
- + Release Manag
- + Inventory
- + Bills of Material
- + WIP
- + Receivables
- + Purchasing

**Line Items**

Main	Pricing	Shipping
Line	Ordered Item	Qty
1.1	OPS 006	150
Line Total 6		
Description Proximity Sensors		
<input type="button" value="Actions"/> <input type="button" value="Related Items"/>		

**Additional Line Information**

Order Number	69423	Line	1.1
<input type="button" value="Holds"/> <input type="button" value="Returns"/> <input type="button" value="Deliveries"/> <input type="button" value="Invoices / Credit Memos"/> <input type="button" value="Internal Requisition"/> <input type="button" value="Drop Ship"/> <input type="button" value="Quantity History"/>			
Return Number	69425	Line	1
Authorized Qty	50	UOM	Ea
Accepted Qty	50	Credit Price	40
Credit Invoice			
Order Type	Mixed	Warehouse	Seattle Manuf
Line Type	Return (Receipt)		

**Navigator - Order Management Super User, Vision Operations (USA)**

**Sales Orders**

- + Orders, Returns
- + Oracle pricing
- + Oracle pricing
- + Negotiation
- + Sales Agreement
- Pricing and Avail
- + Shipping
- + Customers
- + Scheduling
- + Setup
- + Reports, Reque
- WF Notification:
- + Release Manag
- + Inventory
- + Bills of Material
- + WIP
- + Receivables
- + Purchasing

**Line Items**

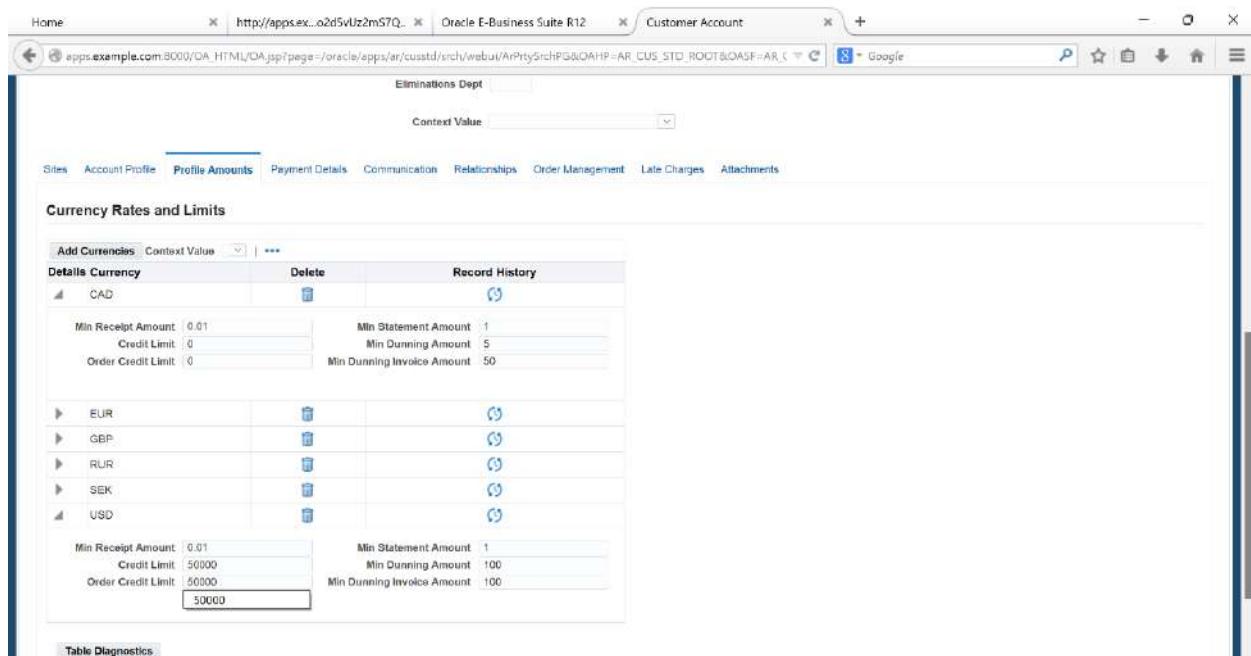
Main	Pricing	Shipping
Line	Ordered Item	Qty
1.1	OPS 006	150
Line Total 6		
Description Proximity Sensors		
<input type="button" value="Actions"/> <input type="button" value="Related Items"/>		

**Additional Line Information**

Order Number	69423	Line	1.1
<input type="button" value="Holds"/> <input type="button" value="Returns"/> <input type="button" value="Deliveries"/> <input type="button" value="Invoices / Credit Memos"/> <input type="button" value="Internal Requisition"/> <input type="button" value="Drop Ship"/> <input type="button" value="Quantity History"/>			
Number	10047400	Batch Source	ORDER ENTRY
Date	14-10-2024	Amount	6,516.00
<input type="button" value="Invoice Details"/>			

## 18. Credit Check Rule

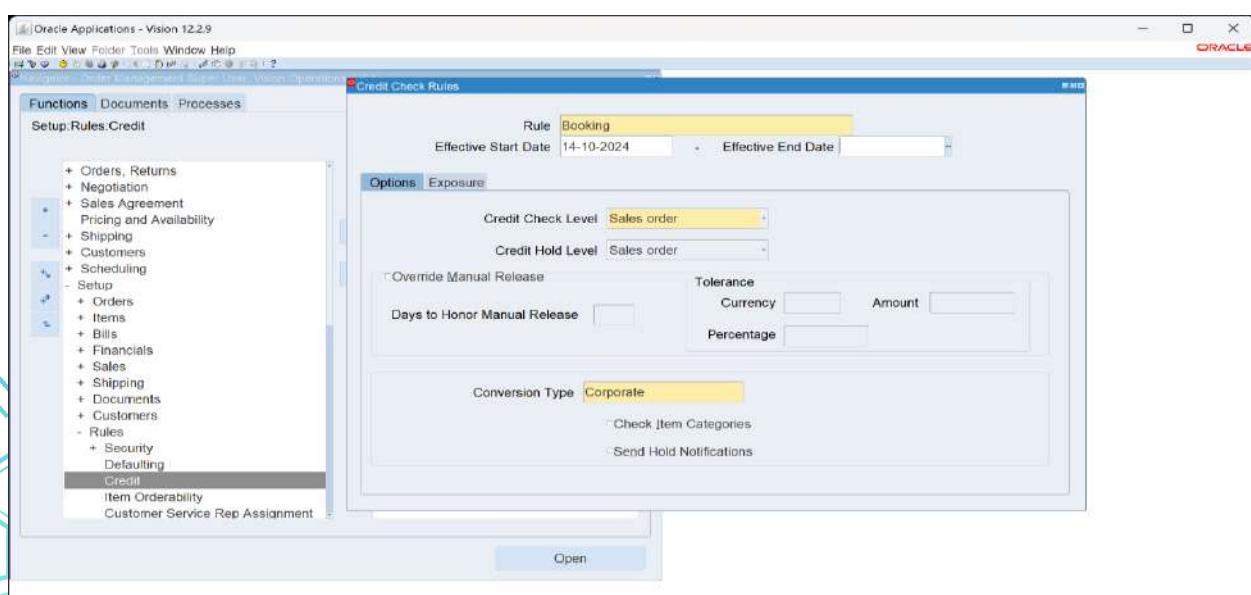
- Credit check rule Order management -> receivables -> customers -> customers
- Enter customer name, then find
- Update profile amounts for the customer



The screenshot shows the Oracle E-Business Suite R12 Customer Account interface. The top navigation bar includes Home, Oracle E-Business Suite R12, Customer Account, and a Google search bar. Below the navigation is a toolbar with links for Eliminations Dept, Context Value, and various account management tabs: Sites, Account Profile, Profile Amounts (which is selected), Payment Details, Communication, Relationships, Order Management, Late Charges, and Attachments.

The main content area displays the "Currency Rates and Limits" section. It features a table titled "Add Currencies" with columns for Details, Currency, Delete, and Record History. The table lists several currencies with their respective minimum receipt amounts, credit limits, and order credit limits. For example, CAD has a Min Receipt Amount of 0.01, Credit Limit of 0, and Order Credit Limit of 0. USD has a Min Receipt Amount of 0.01, Credit Limit of 50000, and Order Credit Limit of 50000. Other currencies listed include EUR, GBP, RUR, SEK, and USD.

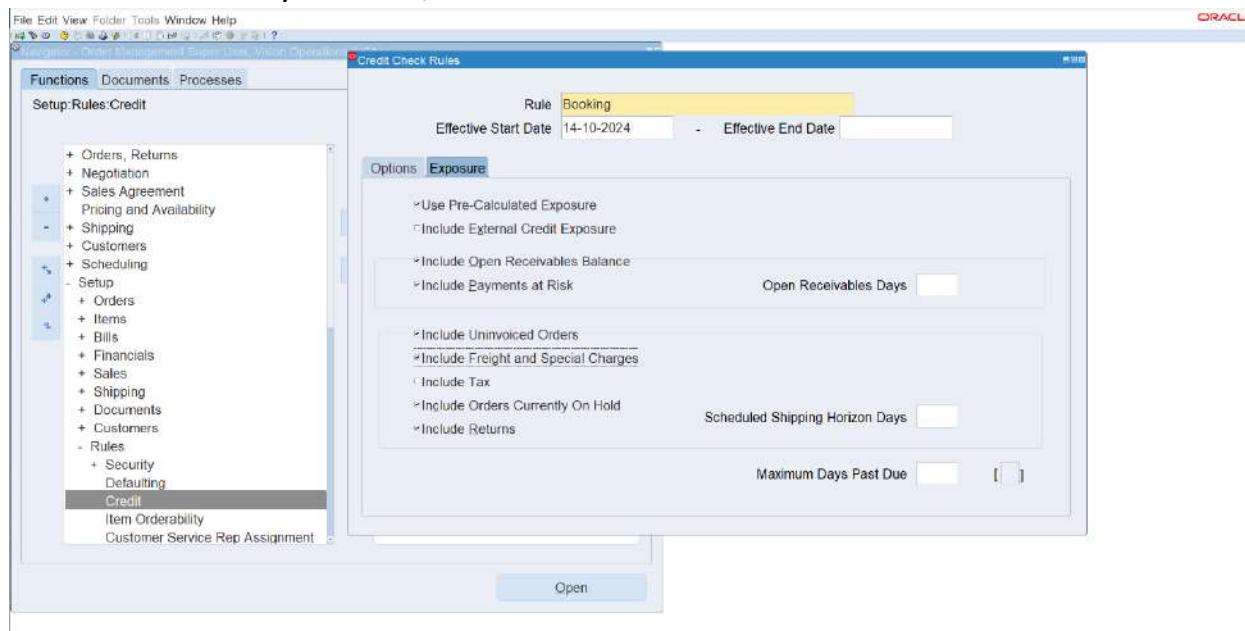
- Create Credit Check Rule
- Order Management > Setup > rules -> Credit >
- Define Credit Check Rule
- Enter Booking in the Rule field.
- Use the list of values to select Sales Order in the Credit Check Level field select Sales Order in the Credit Hold Level field and select Corporate in the Conversion Type field.



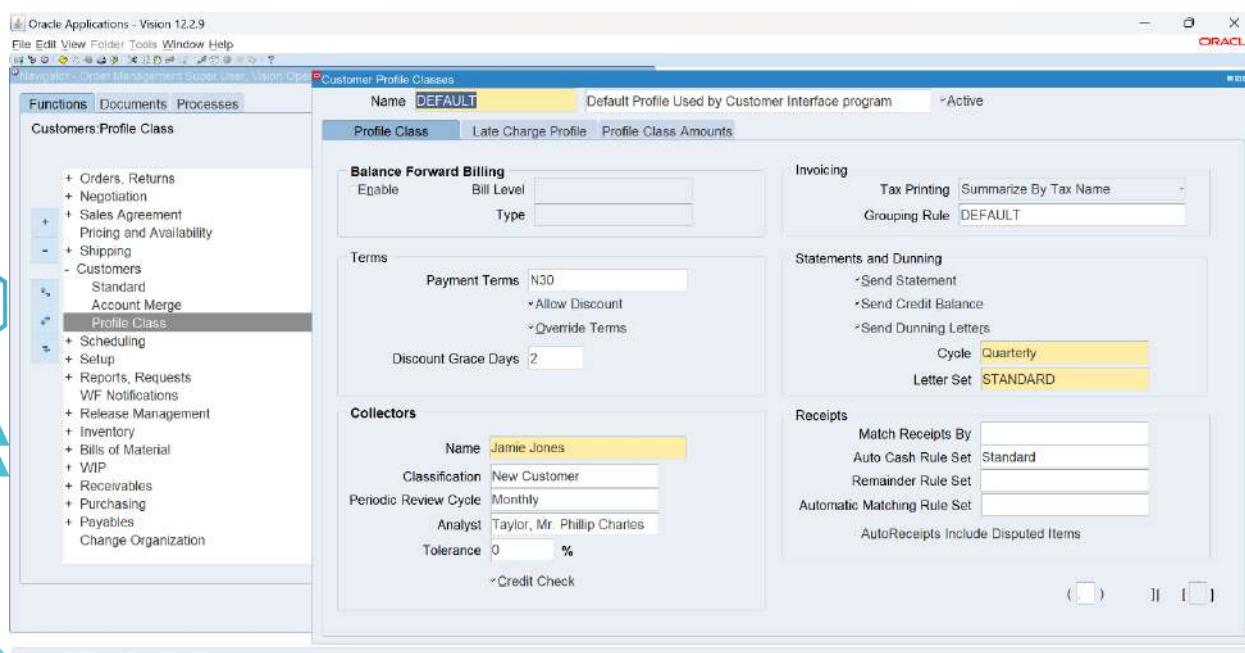
The screenshot shows the Oracle Applications - Vision 12.2.9 Credit Check Rules dialog box. The left sidebar contains a navigation tree with categories like Functions, Documents, Processes, Setup, Rules, Credit, and more. The main panel is titled "Credit Check Rules" and shows the following configuration:

- Rule: Booking
- Effective Start Date: 14-10-2024
- Effective End Date: (dropdown menu)
- Options tab: Credit Check Level (Sales order), Credit Hold Level (Sales order), Days to Honor Manual Release (checkbox), Tolerance (Currency and Amount fields), Conversion Type (Corporate), and checkboxes for Check Item Categories and Send Hold Notifications.
- Exposure tab: (not fully visible)

- On exposure tab enable: use Pre-Calculated Exposure, Include Uninvoiced Orders, Include Freight and Special Charges, Include Tax, Include Orders Currently on Hold, Include Returns then Save.



- Create profile class: customs -> profile class
- Enter the profile class and profile class amount details



Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

**Customer Profile Classes**

Name: DEFAULT Default Profile Used by Customer Interface program Active

Profile Class Late Charge Profile Profile Class Amounts

Currency: USD

Currency Rates and Limits

Credit Limit	5,000.00	Min Receipt Amount	0.01
Order Credit Limit	5,000.00	Min Statement Amount	1.00

Exchange Rate Information: Exchange Rate Type Corporate

Tolerance

Minimum Customer Balance Rate	Value: 5
Minimum Invoice Balance Amount	Value: 100.00
Minimum Charge Per Invoice	Value: 50

Interest Charge

Type: Fixed Rate	Value: 10
Charge Schedule	

Penalty Charge

Type	Value
Charge Schedule	

- set payment terms : setup -> orders -> payment term

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

**Payment Terms (Order Management Super User, Vision Operations (USA))**

Name: N30 Description: Net 30 Days (Process) - Partial Payments Discount and CREDIT CHECK

Allow Discount on Partial Payments:

Prepayment:

Credit Check:

Billing Cycle: Base Amount: 100

Discount Basis: Invoice Amount Effective Dates: 05-01-2000

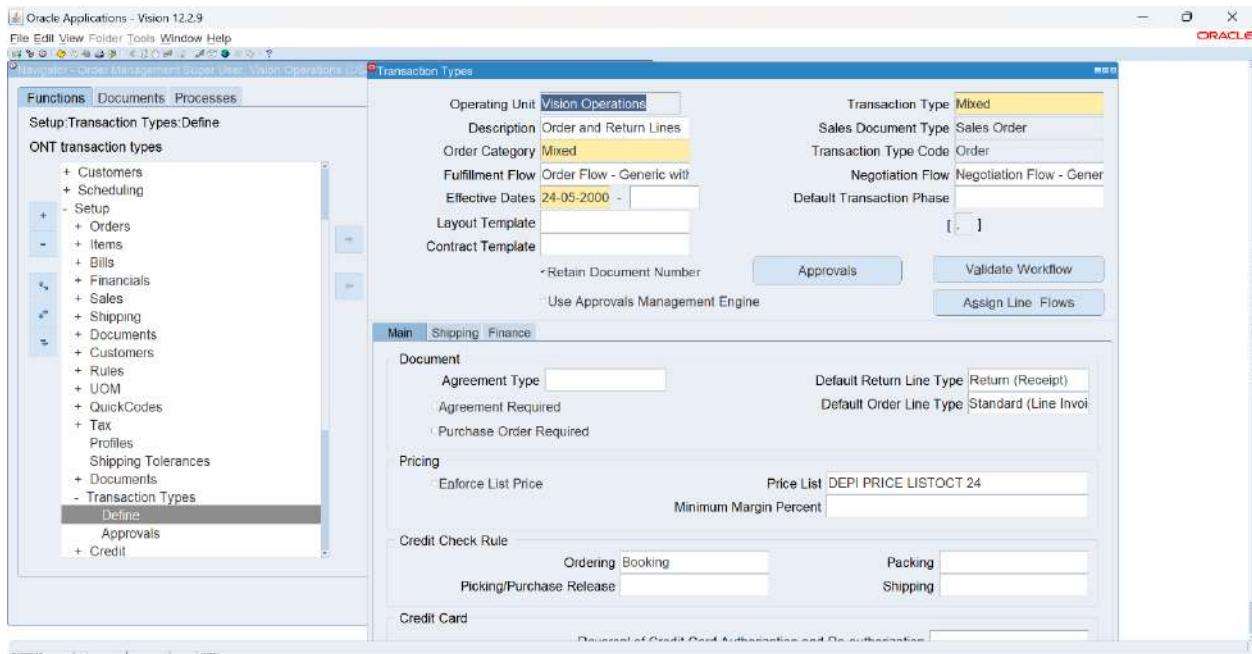
Print Lead Days: Installment Options: Allocate tax and freight

Payment Schedule:

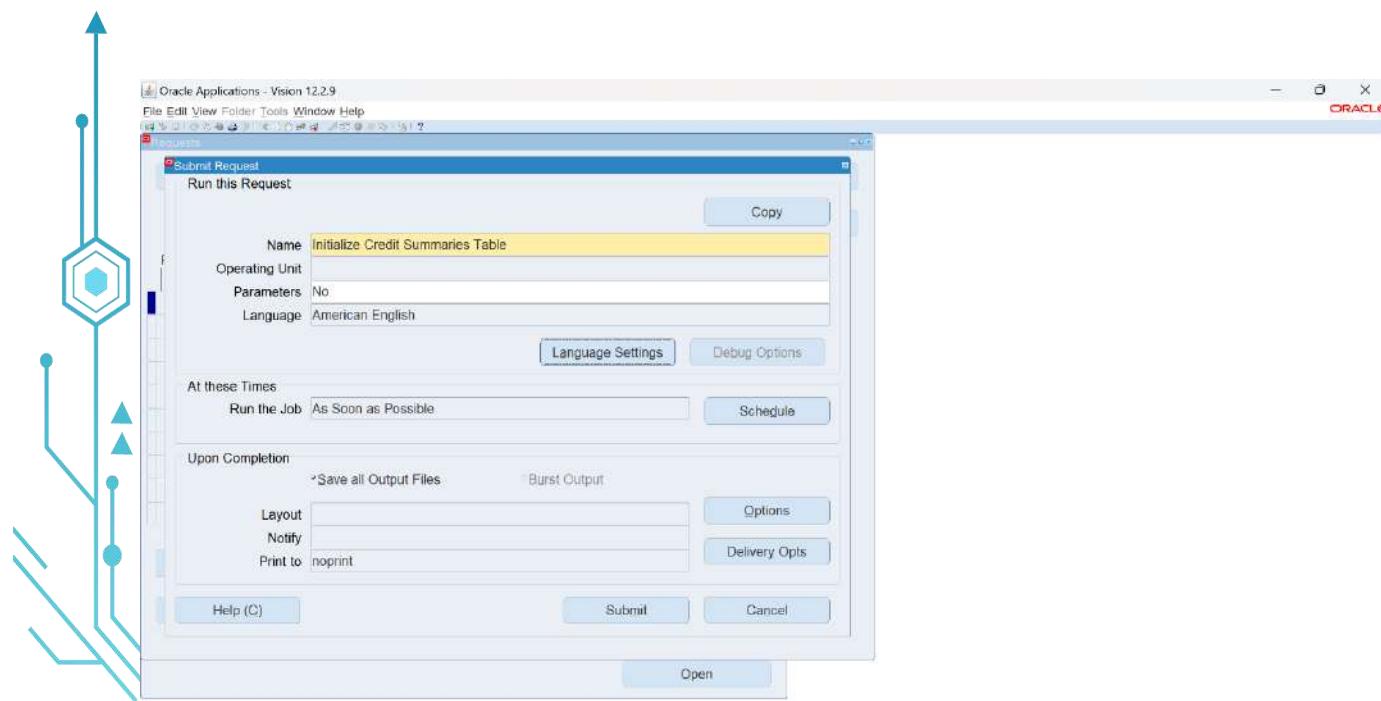
Seq	Relative Amount	Due Days	Date	Day of Month	Months Ahead
1	100	30			

Discounts: Open

- Create transaction type
- Setup -> transaction types ->define



- Run concurrent requests to: initialize credit summarize table, credit check processor, credit exposure report
- All requests completed normal



Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

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
8893435	Initialize Credit Summaries		Completed	Normal	N
8892428	EN-US: (Commercial Invoice)	8891451	Completed	Normal	..., 207, 6261833, D, MSTK
8892427	EN-US: (Packing Slip Rep)	8891450	Completed	Normal	207, 6261833, N, D, DRAFT,
8892428	EN-US: (Bill of Lading)	8891449	Completed	Normal	207, ..., 6261833, 5510212, ..
8891456	EN-US: (Commercial Invoice)	8891443	Completed	Normal	..., 207, 6261832, D, MSTK
8891455	EN-US: (Packing Slip Rep)	8891442	Completed	Normal	207, 6261832, N, D, DRAFT,
8891454	EN-US: (Bill of Lading)	8891441	Completed	Normal	207, ..., 6261832, 5510211, ..
8891453	Interface Trip Stop		Completed	Normal	ALL, 6261833, 0
8891452	Vehicle Load Sheet Details		Completed	Normal	5510212
8891451	Commercial Invoice (Multi)		Completed	Normal	665, 43717, Y

Hold Request View Details Rerun Request View Output

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

Open



Sense the Future

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Requests

Run Request

Run this Request

Name **Credit Check Processor**

Operating Unit

Parameters

Language

Copy

At these Times Run the Job

Upon Completion

Layout

Notify

Print

Customer Profile Classes From To

Customer Names From To

Customer Numbers From To

Order Dates From **14-10-2024** To **14-10-2024**

Order Sequence **Earliest Order Date First**

OK Cancel Clear Help (C)

Submit Cancel Gender

Open

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Requests

**Submit Request**

Run this Request

Name Credit Exposure Report

Operating Unit Vision Operations

Parameters Customer Range Summary: Avengers Electronic

Language American English

At these Times

Run the Job As Soon as Possible

Upon Completion

\*Save all Output Files

Burst Output

Layout Options

Notify Delivery Opt.

Print to noprint

Help (C) Submit Cancel Open



Sense the Future

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Requests

**Submit Request**

Run this Request

Name Credit Exposure Report

Operating Unit Vision Operations

Parameters Customer Range Summary

Language American English

At these Times

Run the Job As Soon as Possible

Upon Completion

\*Save all Output Files

Burst Output

Layout Options

Notify Delivery Opt.

Print to noprint

Help (C) Submit Cancel Clear Open

Parameters

Report By Customer Range Summary

Party Name

Party Number

Party Names From To

Party Numbers From To

Customer Profile Classes From To

Customer Names From To

Customer Numbers From To

Credit Check Rule Booking

OK Cancel Clear Help

Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Requests

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

Auto Refresh (X)

Copy Single Request Copy Request Set

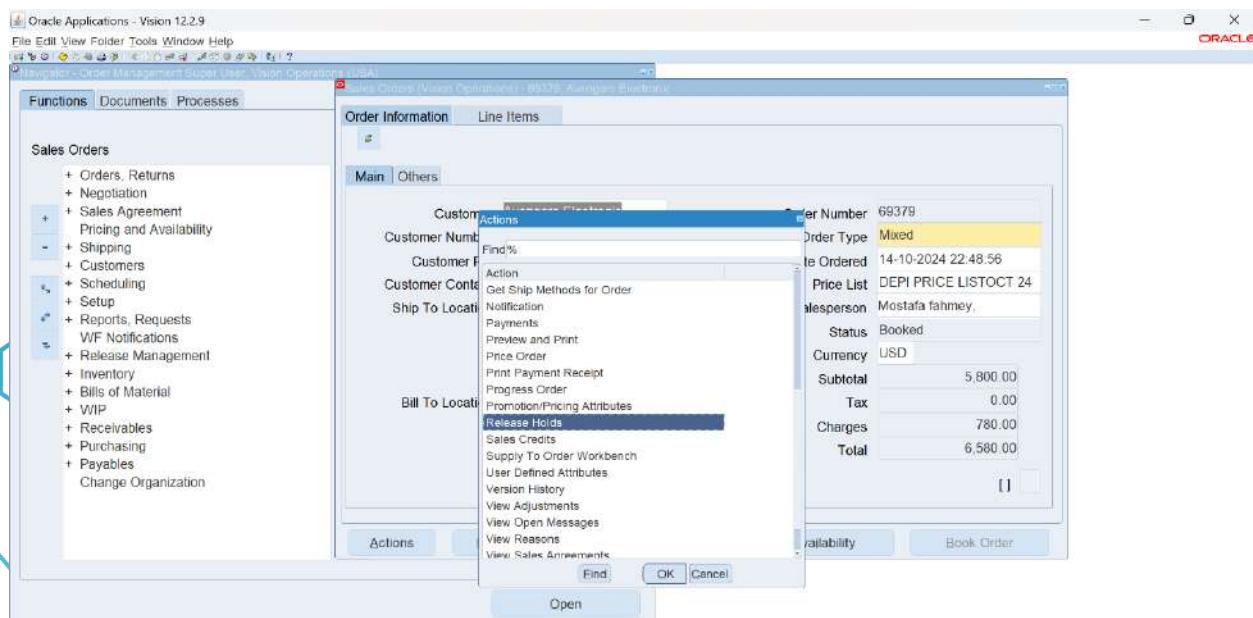
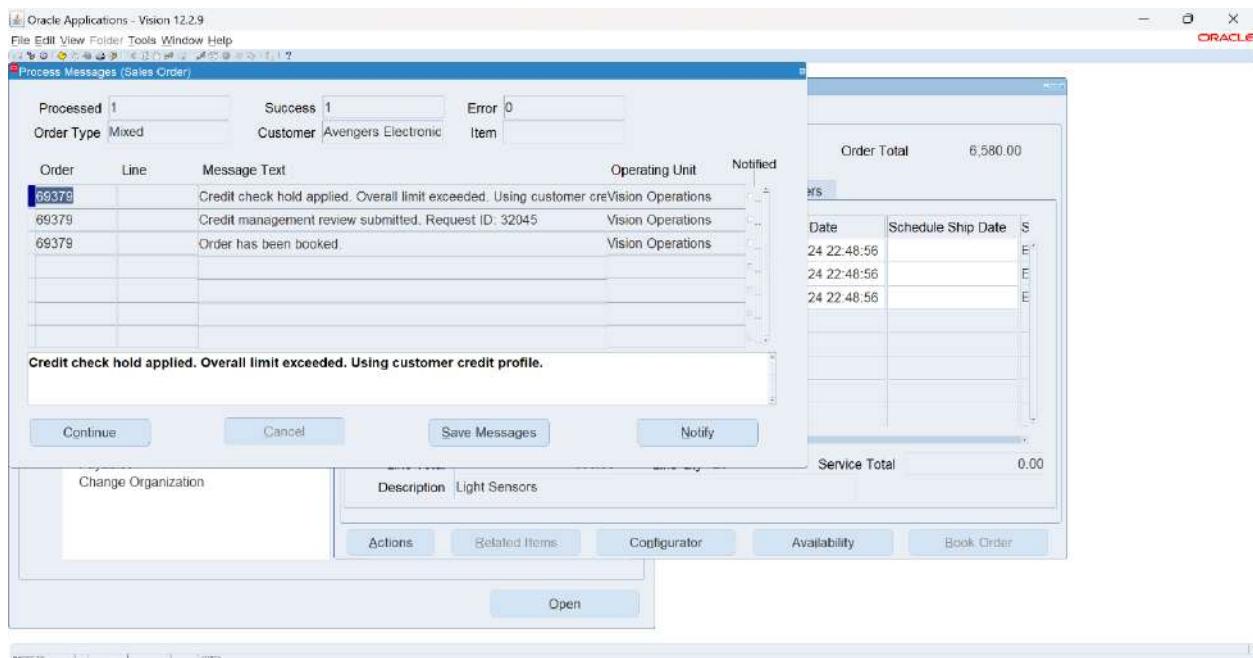
Request ID	Name	Parent	Phase	Status	Parameters
8893439	Credit Exposure Report		Completed	Normal	CUST_SUMMARY..., CUST...
8893437	Credit Check Processor		Completed	Normal	, 204, ..., 204/10/14 00:00
8893435	Initialize Credit Summaries		Completed	Normal	N
8892428	EN-US: (Commercial Invoca	8891451	Completed	Normal	..., 207, 6261833, D, MSTK
8892427	EN-US: (Packing Slip Rep	8891450	Completed	Normal	207, 6261833, N, D, DRAFT,
8892426	EN-US: (Bill of Lading)	8891449	Completed	Normal	207, ..., 6261833, 5510212, ...
8891456	EN-US: (Commercial Invoca	8891443	Completed	Normal	..., 207, 6261832, D, MSTK
8891455	EN-US: (Packing Slip Rep	8891442	Completed	Normal	207, 6261832, N, D, DRAFT,
8891454	EN-US: (Bill of Lading)	8891441	Completed	Normal	207, ..., 6261832, 5510211, ...
8891453	Interface Trip Stop		Completed	Normal	ALL, , 6261833, 0

Hold Request View Details Rerun Request View Output

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

Open

- From sales order window click on action select Release holds
- A message shows the hold released successfully



Oracle Applications - Vision 12.2.9

File Edit View Folder Tools Window Help

Release Hold

Release Orders

Hold Name: Credit Check Failure Held By: MOSTAFAA FAHMEY

Reason: Approved by Credit Manager

Comments:

Progress Workflow

Release Cancel

Information Line Items

Others

Customer	Avengers Electronic	Order Number	69379
Customer Number	11084	Order Type	Mixed
Customer PO		Date Ordered	14-10-2024 22:48:56
Customer Contact		Price List	DEPI PRICE LIST OCT 24
Ship To Location	Note: APP-ONT-251123: Hold released successfully	Salesperson	Mostafa fahmey,
		Status	Booked
		Currency	USD
		Subtotal	5,800.00
		Tax	0.00
		Charges	780.00
		Total	6,580.00

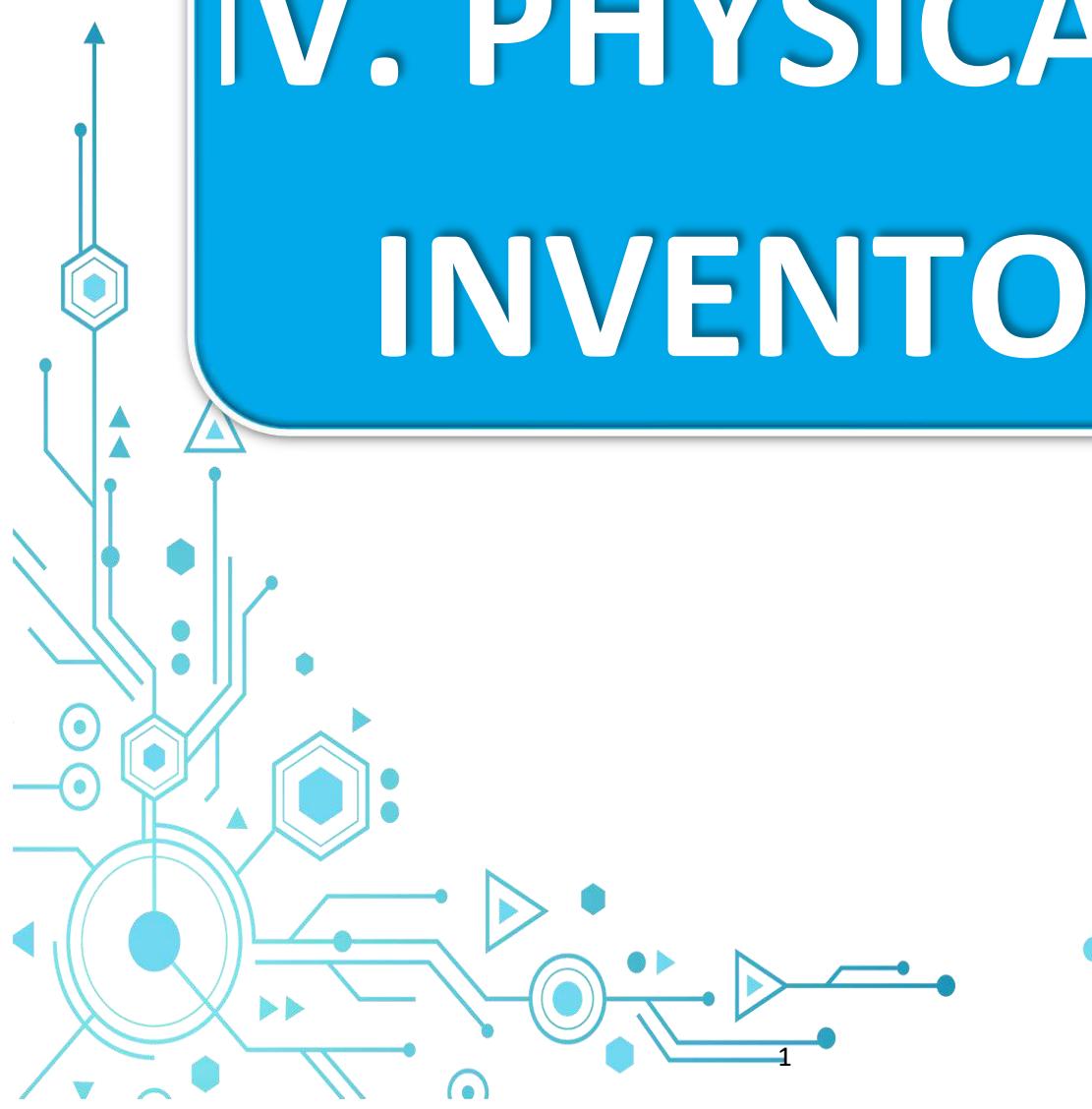
Bill To Location: CAIRO

cairo, EG

Actions Related Items Configurator Availability Book Order Open



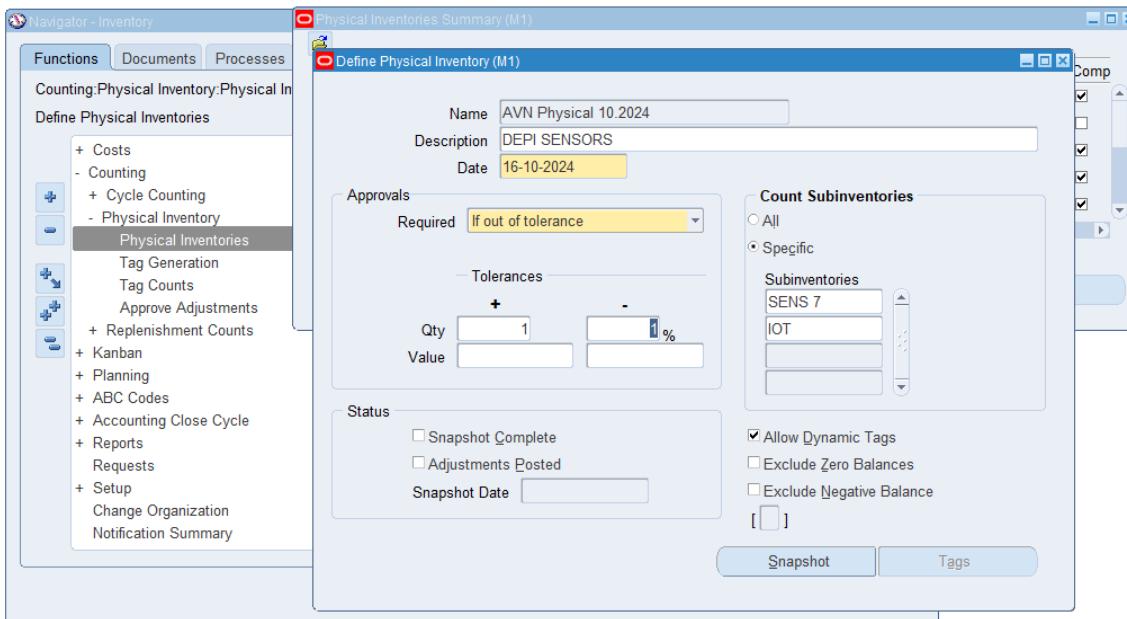
# IV. PHYSICAL INVENTORY



# Physical Inventory

## Step 1:

- Inventory -> counting -> physical inventories
- Define physical inventories name = AVN physical 10.2024
- Organization= M1
- Sub-inventories = SENS 7, IOT



## Step 2:

- Navigate to the Physical Inventories Summary folder window.
- Select the physical inventory = AVN physical 10.2024
- Choose Perform snapshot from the Tools menu.
- This launches the snapshot concurrent process.
- re-query the physical inventory to see the effects of the snapshot. The effects include:
  - The Snapshot Complete box is checked on the Physical Inventories Summary folder window.
  - The Snapshot Complete box is checked, the Snapshot Date is updated, and the Tags button is enabled in the Define Physical inventory window.

**Navigator - Inventory**

Functions Documents Processes

Counting:Physical Inventory:Physical Inventory

Define Physical Inventories

- + Costs
- Counting
  - + Cycle Counting
  - Physical Inventory
- Physical Inventories
  - Tag Generation
  - Tag Counts
  - Approve Adjustments
  - + Replenishment Counts
- + Kanban
- + Planning
- + ABC Codes
- + Accounting Close Cycle
- + Reports
- Requests
- + Setup
- Change Organization
- Notification Summary

**Physical Inventories Summary (M1)**

**Define Physical Inventory (M1)**

Name	AVN Physical 10.2024
Description	DEPI SENSORS
Date	16-10-2024

Approvals

Required: If out of tolerance

Tolerances

Count Subinventories

All  
Specific

Subinventories

Note: Concurrent request 8306618 for inventory snapshot submitted.

Status

Snapshot Complete  
Adjustments Posted  
Snapshot Date: 16-10-2024

Exclude Zero Balances  
Exclude Negative Balance

OK

Snapshot Tags

**Navigator - Inventory**

Functions Documents Processes

Counting:Physical Inventory

Define Physical Inventories

- + Costs
- Counting
  - + Cycle Counting
  - Physical Inventory
- Physical Inventory
  - Tag Generation
  - Tag Counts
  - Approve Adjustments
  - + Replenishment Counts
- + Kanban
- + Planning
- + ABC Codes
- + Accounting Close Cycle
- + Reports
- Requests
- + Setup
- Change Organization
- Notification Summary

**Physical Inventories Summary (M1)**

**Define Physical Inventory (M1)**

Date	16-10-2024	Description	DEPI SENSORS	Snapshot Comp
------	------------	-------------	--------------	---------------

Name: AVN Physical 10.2024  
Description: DEPI SENSORS  
Date: 16-10-2024

Approvals

Required: If out of tolerance

Tolerances

Count Subinventories

All  
Specific

Subinventories: IOT, SENS 7

Status

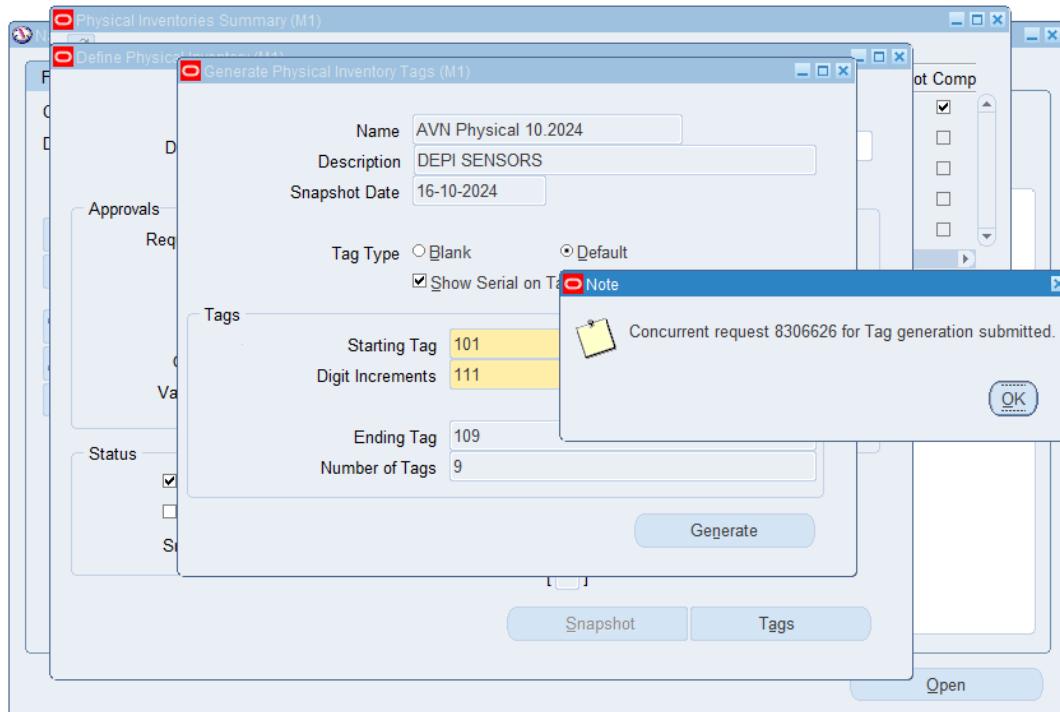
Snapshot Complete  
Adjustments Posted  
Snapshot Date: 16-10-2024

Allow Dynamic Tags  
Exclude Zero Balances  
Exclude Negative Balance

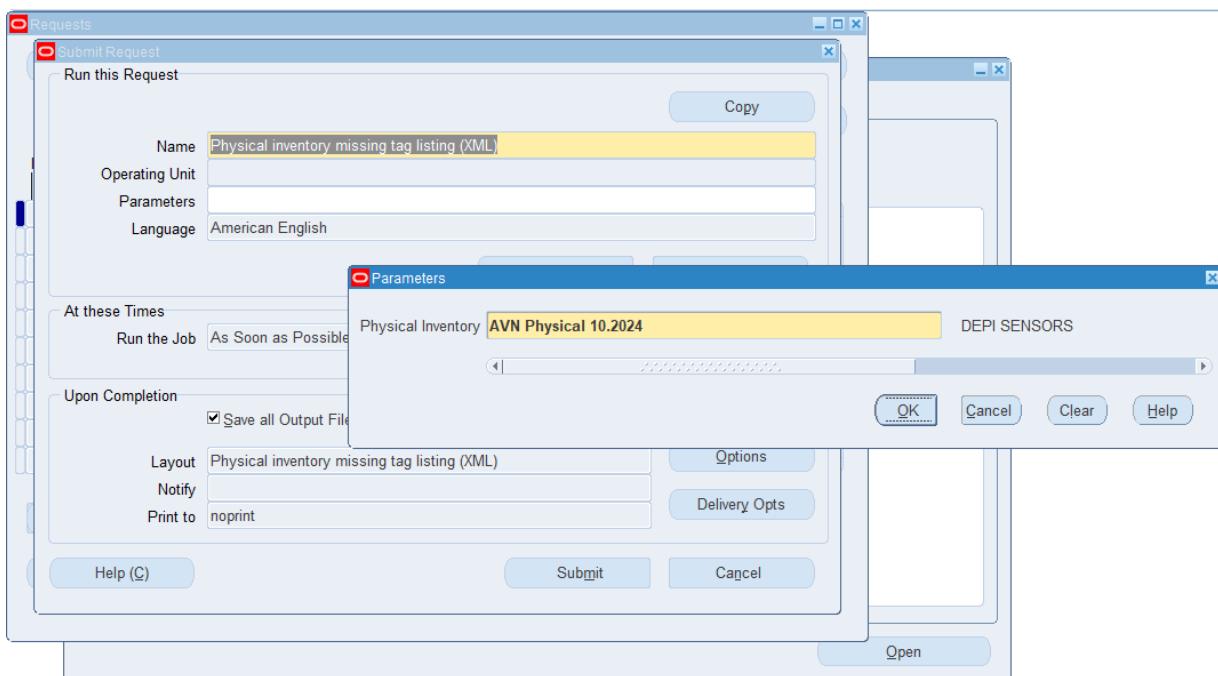
Snapshot Tags

### Step 3:

- Generate
- Concurrent Request for Tag generation = submitted



- Submit a new request = Physical inventory missing tag listing (XML)
- Parameters > physical inventory = AVN physical 10.2024



- View output of request

**Physical Inventory Missing Tag Listing**

Report Date: 16-OCT-2024 22:52  
Page 1 of 1

Physical Inventory Name AVN Physical 10.2024

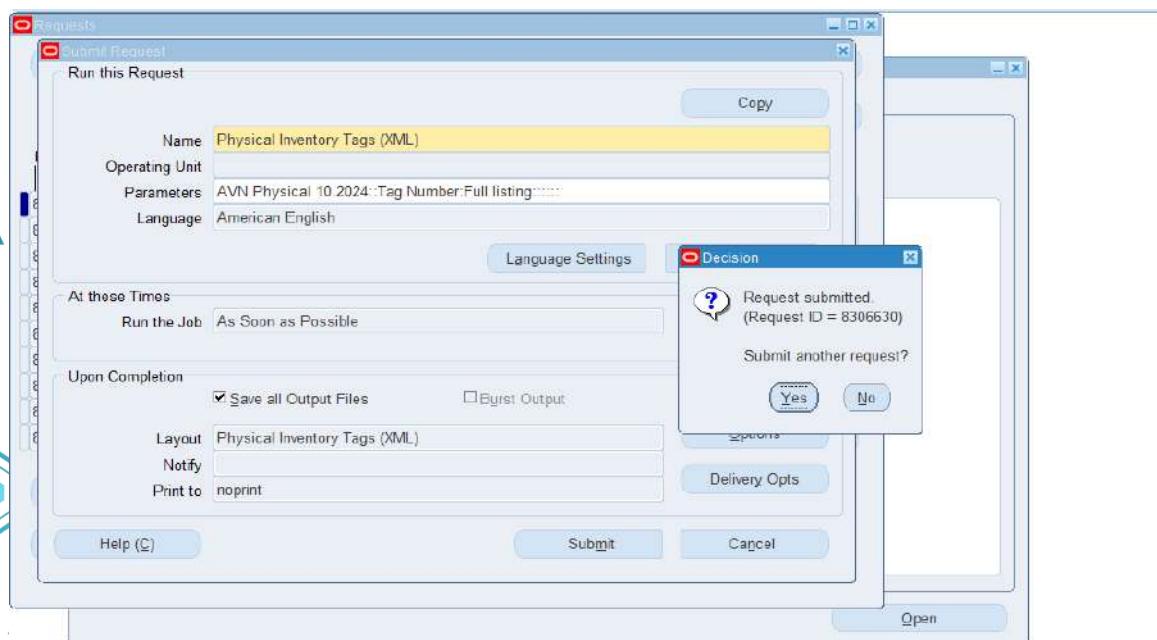
Tag Number	SubInv	Item	Rev	Locator	Lot Number	Serial Number
101	IOT	RTD 0001				
102	IOT	THS 003				
103	IOT	PIR 005				
104	IOT	MG 008				
105	IOT	RGBD 010				
106	SENS 7	CAPS 002				
107	SENS 7	THS 003				
108	SENS 7	LDR 004				
109	SENS 7	OPS 006				

Number of Missing Tags: 9

End of Report

#### Step 4:

- Submit a new request >name = physical inventory Tags (XML)
- Parameters = AVN physical 10.2024: Tag number: Full listing
- Submit another request= NO



- View output of request

**AVN Physical 10.2024**

Report Date: 16-OCT-2024 22:55  
Page 1 of 3

ORACLE  
M1 Seattle Manufacturing

Tag	101	Printed	16-OCT-2024
Item	RTD 0001		
Description	Temperature Sensors		
Primary UOM	Ea		
Revision			
SubInventory	IOT		
Locator			
Lot Num		Counted By	
Serial Num		Count Date	
		Count UOM	
		Count Qty	

**AVN Physical 10.2024**

Report Date: 16-OCT-2024  
Page 1 of 3

ORACLE  
M1 Seattle Manufacturing

Tag	102	Printed	16-OCT-2024
Item	THS 003		
Description	Humidity Sensors		
Primary UOM	Ea		
Revision			
SubInventory	IOT		
Locator			
Lot Num		Counted By	
Serial Num		Count Date	
		Count UOM	
		Count Qty	

## Step 5:

- Navigate to inventory > counting > Physical Inventory > Tag Counts
- Enter the physical inventory= AVN physical 10.2024
- Default Counter field= Yusuf, Ms.Yousra
- Enter or query the tag numbers =109

**Physical Inventory Tag Counts (M1)**

Name	AVN Physical 10.2024	DEPI SENSORS																																																								
Snapshot Date	16-10-2024	<input type="button" value="Find"/>																																																								
Default Counter	Yusuf, Ms. Yousra																																																									
<input type="button" value="Main"/> <input type="button" value="Detail"/> <table border="1"> <thead> <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>103</td><td>PIR 005</td><td></td><td>IOT</td><td></td><td>Ea</td><td>320</td></tr> <tr><td>104</td><td>MQ 008</td><td></td><td>IOT</td><td></td><td>Ea</td><td>69</td></tr> <tr><td>105</td><td>RGBD 010</td><td></td><td>IOT</td><td></td><td>Ea</td><td>150</td></tr> <tr><td>106</td><td>CAPS 002</td><td></td><td>SENS 7</td><td></td><td>Ea</td><td>100</td></tr> <tr><td>107</td><td>THS 003</td><td></td><td>SENS 7</td><td></td><td>Ea</td><td>200</td></tr> <tr><td>108</td><td>LDR 004</td><td></td><td>SENS 7</td><td></td><td>Ea</td><td>100</td></tr> <tr><td>109</td><td>OPS 006</td><td></td><td>SENS 7</td><td></td><td>Ea</td><td>150</td></tr> </tbody> </table>			Tag	Item	Rev	Subinventory	Locator	UOM	Qty	103	PIR 005		IOT		Ea	320	104	MQ 008		IOT		Ea	69	105	RGBD 010		IOT		Ea	150	106	CAPS 002		SENS 7		Ea	100	107	THS 003		SENS 7		Ea	200	108	LDR 004		SENS 7		Ea	100	109	OPS 006		SENS 7		Ea	150
Tag	Item	Rev	Subinventory	Locator	UOM	Qty																																																				
103	PIR 005		IOT		Ea	320																																																				
104	MQ 008		IOT		Ea	69																																																				
105	RGBD 010		IOT		Ea	150																																																				
106	CAPS 002		SENS 7		Ea	100																																																				
107	THS 003		SENS 7		Ea	200																																																				
108	LDR 004		SENS 7		Ea	100																																																				
109	OPS 006		SENS 7		Ea	150																																																				
<input type="button" value="Item Description"/> Proximity Sensors <input type="button" value="Void All"/> <input type="button" value="Unvoid All"/>																																																										
<input type="button" value="Open"/>																																																										

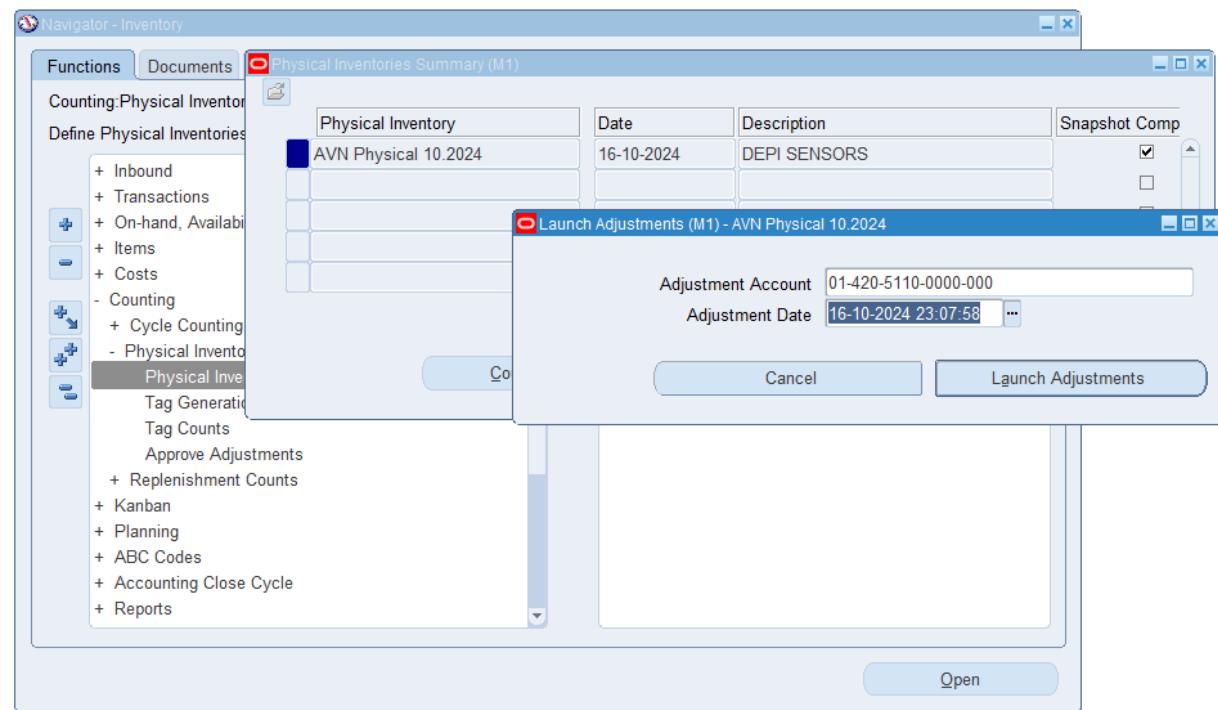
- inventory > counting > physical inventory > approve adjustment

**Approve Physical Adjustments Summary (M1)**

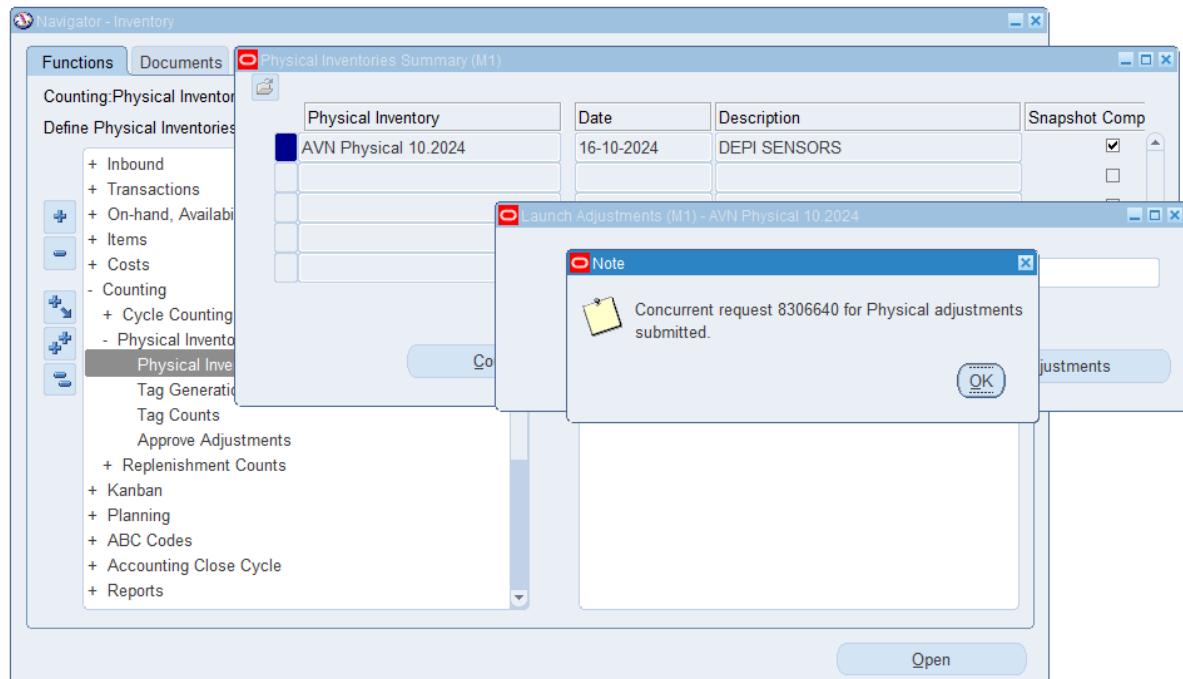
Name	AVN Physical 10.2024	DEPI SENSORS																												
Freeze Date	16-10-2024	<input type="button" value="Find"/>																												
<input type="checkbox"/> Adjustments Posted																														
Adjustments <input type="button" value="Approvals"/> <input type="button" value="Item Details"/> <input type="button" value="Location"/> <input type="button" value="Approvers"/> <table border="1"> <thead> <tr> <th>None</th> <th>Approve</th> <th>Reject</th> <th>Snapshot Qty</th> <th>Snapshot UOM</th> <th>Secondary Qty</th> <th>Secondary UOM</th> </tr> </thead> <tbody> <tr><td>...</td><td>...</td><td>...</td><td>THS 003</td><td>10</td><td>Ea</td><td>-1</td></tr> <tr><td>...</td><td>...</td><td>...</td><td>LDR 004</td><td>110</td><td>Ea</td><td>-10</td></tr> <tr><td>...</td><td>...</td><td>...</td><td>MQ 008</td><td>70</td><td>Ea</td><td>-1</td></tr> </tbody> </table>			None	Approve	Reject	Snapshot Qty	Snapshot UOM	Secondary Qty	Secondary UOM	...	...	...	THS 003	10	Ea	-1	...	...	...	LDR 004	110	Ea	-10	...	...	...	MQ 008	70	Ea	-1
None	Approve	Reject	Snapshot Qty	Snapshot UOM	Secondary Qty	Secondary UOM																								
...	...	...	THS 003	10	Ea	-1																								
...	...	...	LDR 004	110	Ea	-10																								
...	...	...	MQ 008	70	Ea	-1																								
<input type="button" value="Description"/> Humidity Sensors <input type="button" value="Approve All"/> <input type="button" value="Reject All"/> <input type="button" value="Tags"/> <input type="button" value="Open"/>																														
<input type="button" value="Open"/>																														

## Step 6:

- physical inventory > (M)Tools > Launch adjustments
- Concurrent request for physical adjustments = submitted



- When the Concurrent request for physical adjustments process is finished, re-query the physical inventory to see the effects of adjustment
- Adjustments posted box = checked



## Step 7:

- Inventory -> Transaction -> Material transaction
- Find Material transaction
- Source Type = physical inventory
- Find

**Navigator - Inventory** > **Physical Inventories Summary (M1)**

**Functions** > **Define Physical Inventory (M1)**

**Name:** AVN Physical 10.2024  
**Description:** DEPI SENSORS  
**Date:** 16-10-2024

**Approvals:** Required: If out of tolerance

**Tolerances:** Qty: 1, Value: 1 %

**Count Subinventories:** Specific (radio button selected)  
Subinventories: IOT, SENS 7

**Status:** Snapshot Complete, Adjustments Posted  
Snapshot Date: 16-10-2024

**Buttons:** Snapshot, Tags

- Transaction Type

**Navigator - Inventory** > **Material Transactions (M1)**

**Functions** > **Find Material Transactions (M1)**

**Transaction Dates:** 16-10-2024 00:00:00 - 16-10-2024 23:59:59

**Item:** [empty]  
**Description:** [empty]  
**Category Set:** [empty]  
**Subinventory:** [empty]  
**Lot:** [empty]  
**Supplier Lot:** [empty]

**Source Type:** Physical Inventory  
**Source:** [empty]  
 Include Logical Transactions  
**Action:** [empty]  
 Subinventory Transfer  
 Cost Group Transfer

**Transaction Type:** [empty]  
**Transaction Quantities:** [empty] - [empty]  
**Supplier:** [empty]  
**Transferred to Projects:** [empty]

**Buttons:** Clear, Find, Open



## Subinventory Quantity Report

Report Date: 16-OCT-2024 22:36  
Page 1 of 1

Sorted by Subinventory and Item  
Subinventories From SENS 7 To SENS 7

Subinventory	SENS 7	Description	IOT Sensors			
Item	Description	Rev	Locator	UOM	Quantity	
CAPS 002	Pressure Sensors			Ea	100.00	
LDR 004	Light Sensors			Ea	110.00	
OPS 006	Proximity Sensors			Ea	150.00	
THS 003	Humidity Sensors			Ea	200.00	

End of Report

## Subinventory Quantity Report

Report Date: 16-OCT-2024 22:38

Page 1 of 1

Sorted by Subinventory and Item  
Subinventories From IOT To IOT

Subinventory	IOT	Description	DEPI Sensors			
Item	Description	Rev	Locator	UOM	Quantity	
MQ 008	Gas Sensors			Ea	70.00	
PIR 005	Motion Sensors			Ea	320.00	
RGBD 010	Vision Sensors			Ea	150.00	
RTD 0001	Temperature Sensors			Ea	90.00	
THS 003	Humidity Sensors			Ea	10.00	

End of Report

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	101	<b>Printed</b>	16-OCT-2024
<b>Item</b>	RTD 0001		
<b>Description</b>	Temperature Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	IOT	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	102	<b>Printed</b>	16-OCT-2024
<b>Item</b>	THS 003		
<b>Description</b>	Humidity Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	IOT	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	103	<b>Printed</b>	16-OCT-2024
<b>Item</b>	PIR 005		
<b>Description</b>	Motion Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	IOT	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	104	<b>Printed</b>	16-OCT-2024
<b>Item</b>	MQ 008		
<b>Description</b>	Gas Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	IOT	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	105	<b>Printed</b>	16-OCT-2024
<b>Item</b>	RGBD 010		
<b>Description</b>	Vision Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	IOT	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	106	<b>Printed</b>	16-OCT-2024
<b>Item</b>	CAPS 002		
<b>Description</b>	Pressure Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	SENS 7	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	107	<b>Printed</b>	16-OCT-2024
<b>Item</b>	THS 003		
<b>Description</b>	Humidity Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	SENS 7	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	108	<b>Printed</b>	16-OCT-2024
<b>Item</b>	LDR 004		
<b>Description</b>	Light Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	SENS 7	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

M1 Seattle Manufacturing

**AVN Physical 10.2024**

<b>Tag</b>	109	<b>Printed</b>	16-OCT-2024
<b>Item</b>	OPS 006		
<b>Description</b>	Proximity Sensors		
<b>Primary UOM</b>	Ea		
<b>Revision</b>			
<b>Subinventory</b>	SENS 7	<b>Counted By</b>	_____
<b>Locator</b>		<b>Count Date</b>	_____
<b>Lot Num</b>		<b>Count UOM</b>	_____
<b>Serial Num</b>		<b>Count Qty</b>	_____

End of Report

## Physical Inventory Missing Tag Listing

Report Date: 16-OCT-2024 22:52  
Page 1 of 1

Physical Inventory Name AVN Physical 10.2024

Tag Number	Subinv	Item	Rev	Locator	Lot Number	Serial Number
101	IOT	RTD 0001				
102	IOT	THS 003				
103	IOT	PIR 005				
104	IOT	MQ 008				
105	IOT	RGBD 010				
106	SENS 7	CAPS 002				
107	SENS 7	THS 003				
108	SENS 7	LDR 004				
109	SENS 7	OPS 006				

Number of Missing Tags 9

End of Report