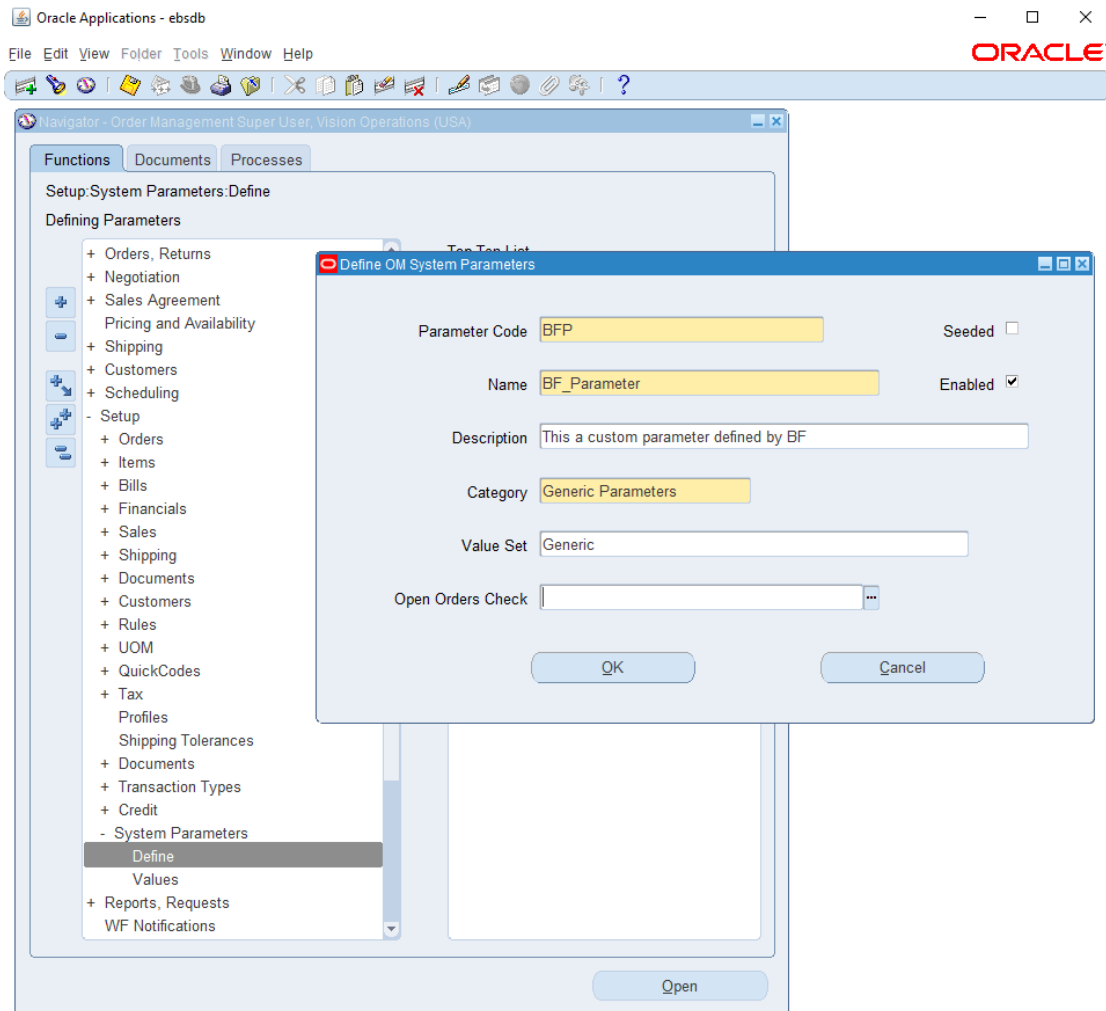


1. Order Management Setup

- Define Order Management System Parameters

Order Management System Parameters are configurable settings that control the behavior of Oracle Order Management. Below is the navigation to this window with some generic values as an example.



2. Customer Management [Customer Creation]

- Define and Maintain Customer Accounts and Contacts

To reach the customer creation page first navigate to Customer>Standard which will open an html page and from here click the Create button. This will show the following which has some generic info filled in.

The screenshot shows the 'Create Organization' form in the Oracle Trading Community. The form is divided into several sections: 'Customer Information', 'Account Information', 'Account Site Address', and 'Account Site Details'. The 'Customer Information' section includes fields for Organization Name (BF Customer), Alias, Name Pronunciation, D-U-N-S Number, URL, Context Value, and Line of Business of the Party. The 'Account Information' section includes fields for Account Description (BF Customer), Profile Class (DEFAULT), Classification, Account Type (External), Sales Channel, Reference, Date Established (27-Nov-2024), Cust GL Class, Tax Loc Code, Tax Calc Code, Cust Price Cls, Customer Status (Default), Eliminations Dept, and Context Value. The 'Account Site Address' section includes fields for Country (United States), Address Line 1 (Fake address), Address Line 2, Address Line 3, Address Line 4, City, County, State, Postal Code, Address Description, Global Location Number, Identifying Address checkbox, Geography Code Override, and Context Value. The 'Account Site Details' section is partially visible at the bottom.

Customers

Customers >

Create Organization Cancel Save And Add Details Apply

Customer Type ORGANIZATION

Customer Information

* Organization Name BF Customer

Alias

Name Pronunciation

D-U-N-S Number

URL

Must include: http://

Context Value

Line of Business of the Party

Account Information

Account Description BF Customer

Profile Class DEFAULT

Classification

Account Type External

Sales Channel

Reference

Date Established (27-Nov-2024)

Cust GL Class

Tax Loc Code

Tax Calc Code

Cust Price Cls

Customer Status Default

Default Status

Eliminations Dept

Context Value

Account Site Address

* Country United States

* Address Line 1 Fake address

Address Line 2

Address Line 3

Address Line 4

City

County

State

Postal Code

Address Description

Global Location Number

Identifying Address

Geography Code Override

Context Value

Account Site Details

Operating Unit Vision Operations

Transaction

Once you have created the customer organization, go to its page and add a site
Below are examples with AT&T

ORACLE Receivables

Customers > Customer: American Telephone & Telegraph

Customer Type: Organization

Customer Information

Organization Name: American Telephone & Telegraph
 Registry ID: 1001
 Name Pronunciation: AT&T

Accounts

Status: Active

Sites

Purpose: ☐ Show related contact sites
 Status: Active
 Operating Unit:
 Address Line 1:
 City:
 State:
 Country:

Create Site

Address	Site Source	Mainship	Country	Purposes	Operating Unit	Site Number	Map	Status	Details	Remove	Record History
Clerendon Court, Media Vale, LONDON, WC2 4SA, UNITED KINGDOM			United Kingdom	Bill To, Ship To	Vision Industries	4142		Active			
Bank 25, 4807 Wt Groningen, NETHERLANDS			Netherlands	Bill To, Ship To	Vision Netherlands	4200		Active			
3 Bethesda Metro Center, BETHESDA, MD 20814			United States	Bill To, Ship To	US Federal Government	4205		Active			
Gelachestraat, 32, 9140 Temse, BELGIUM			Belgium	Bill To, Ship To	Vision Belgium	4816		Active			
Via del Lucchi, 677, 40125 Bologna, ITALY			Italy	Bill To, Ship To, Legal	Vision Italy	4848		Active			
ARISTOTELEOUS 23, GREECE			Greece	Bill To	Vision Greece	5301		Active			
Rte de la Poste 21, 1800 Vevey, SWITZERLAND			Switzerland	Bill To, Ship To	Vision Switzerland	14421		Active			
D-128 Budapest V., BUDAPEST, HUNGARY			Hungary	Bill To, Ship To	Vision Hungary	14988		Active			
Obolova St. 25, CHERNOBYL 14030, UKRAINE			Ukraine	Bill To, Ship To	Vision Ukraine	24104		Active			
3450 Elm Street, NEW JERSEY, NJ 07104			United States	Ship To	Vision Services	1214		Active			

In the site setup process in the Communication tab you can create a contact person as well as shown below.

ORACLE Receivables

Customers > Customer: American Telephone & Telegraph > Site: 4142

Organization Name: American Telephone & Telegraph
 Registry ID: 1001
 Account Number: 1001
 Account Description: AT&T

Location

Address: Clerendon Court Media Vale LONDON WC2 4SA UNITED KINGDOM

Account Site Information

Site Name:

Site Details | **Business Purposes** | **Communication** | **Payment Details** | **Profile** | **Profile Amounts** | **Late Charges** | **Attachments**

Search

Name: Job Title:
 Contact Number: Email Address:

Account Site Contacts

Status: Active
 Show Contacts:

Assign Primary by Site | **Create Contact**

Name	Bill To	Contact Name	Phone Num	E-Mail	Address	Status	Details	Upd...	Remove	Record Hist...
John					Clerendon Court, Media Vale, LONDON, WC2 4SA, UNITED KINGDOM	Active				

•Setup Customer Shipping and Billing Information

From the Customer organization page again, you can navigate to Business Purpose tab and configure the Shipping and Billing information as shown below.

ORACLE Receivables

Customers > Customer: American Telephone & Telegraph > Site: 4142

Organization Name: American Telephone & Telegraph
 Registry ID: 1001
 Account Number: 1001
 Account Description: AT&T

Location

Address: Clerendon Court Media Vale LONDON WC2 4SA UNITED KINGDOM

Account Site Information

Site Name:

Site Details | **Business Purposes** | **Communication** | **Payment Details** | **Profile** | **Profile Amounts** | **Late Charges** | **Attachments**

Status: Active

Select Purpose | **Location** | **Bill To Location** | **Primary** | **Details** | **Remove** | **Record History**

Purpose	Location	Bill To Location	Primary	Details	Remove	Record History
Bill To	London					
Ship To	London					

Additional Details: Bill To

- Manage Customer-Specific Pricing and Discounts

You must navigate to Sales Agreement > Sales Agreement and here you can enter the customer's name as highlighted below. You can enter items as shown in this example below

Oracle Applications - ebsdb

File Edit View Folder Tools Window Help

Order Management Super User: Vision Operations (USA)

Functions Documents Processes

Sales Agreement: Sales Agreements

- + Orders, Returns
- + Negotiation
- + Sales Agreement
 - Sales Agreements
 - Sales Agreement Organizer
- + Pricing and Availability
- + Shipping
- + Customers
- + Scheduling
- + Setup
 - + Orders
 - + Items
 - + Bills
 - + Financials
 - + Sales
 - + Shipping
 - + Documents
 - + Customers
 - + Rules
 - + UOM
 - + QuickCodes
 - + Tax
 - Profiles
 - Shipping Tolerances
 - + Documents
 - + Transaction Types
 - + Credit
 - + System Parameters
 - + Reports, Requests
 - WF Notifications

Sales Agreement (Vision Operations) - 1000, Hilman and Associates

Main Shipping Accounting Pricing Fulfillment Acceptance

Customer: Hilman and Associates

Sales Agreement Number: 1000

Sales Agreement Type: BSA with Approvals

Sales Agreement Name: 1000

Contract Template:

User Status: Active

Version Number: 0

Customer Number: 1004

Customer PO: HIL-01

Customer Contact:

Salesperson:

Activation Date: 18-JUN-2003

Expiration Date:

☐ Disallow New Releases

Main Shipping Accounting Pricing Fulfillment Summary

Line	Item Context	Item	UOM	Item Description	Activation Date	Expiration Date	Preferred Grade	Salesperson	Customer PO
1	Internal Item Num	ASS4355	Ea	Sentinel Standard Desktop	18 JUN 2003				HIL-01

Actions Cogtract Terms Price List Setup Submit Draft

Then you can apply a defined price list for the item as shown below in the pricing tab

Sales Agreement (Vision Operations) - 1000: Hilman and Associates

Customer: Hilman and Associates
 Customer Number: 1004
 Customer PO: HIL-01
 Customer Contact:
 Salesperson:
 Activation Date: 18-JUN-2003
 Expiration Date:
☐ Disallow New Releases

Sales Agreement Number: 1000
 Sales Agreement Type: BSA with Approvals
 Sales Agreement Name:
 Contract Template:
 User Status:
 Status:
 Version Number:
☐ Disallow New Releases

Price List

Find %

Name	Description
10% off Web Special	10% off Corporate Web Special
A&D Price List	A&D Price List
ADS HTML Pricing 1	Used for HTML Pricing Mass Mainten...
ADS HTML Pricing 2	Used for HTML Pricing Mass Mainten...
Business World	Price List for Business World
Buy Sell Subc Price List	
Chargeback DG1	
Corporate	Corporate Price List
Cost Plus Margin	Cost Plus Margin
Counter Sales Price List	Counter Sales Price List
EAM H1 Maintenance Price List	EAM Work Order Billing Price List for ...
EAM M1 Maintenance Price List	EAM M1 Price List for Work Order Billi...
EAM UTE Maintenance Price List	EAM Work Order Billing Price List for ...
EUR Cost Plus Margin	EUR Cost Plus Margin

Find OK Cancel

Line Item Context Item UOM Price List Unit List Price

Line	Item Context	Item	UOM	Price List	Unit List Price
1	Internal Item Num	AS54888	Ea		

Actions Contract Terms Price List Setup Submit Draft

If you want to create a price list and define it yourself, it is as follows.

Sales Agreement (Vision Operations) - 1000: Hilman and Associates

Price List: Corporate ☒ Enforce Price

Create

New Modifier List:
 Default Discount %:
 Default Discount Amount:
 New Price List:
 18-JUN-2003

Advanced Pricing - Price Lists

Main Other

Name: Corporate ☒ Mobile Download ☒ Active

Description: Corporate Price List

Currency: USD Multi-Currency Conversion: Corporate Pricelist Converter Round To: -2

Effective Dates: 01-JAN-1996 - ☒ Global Operating Unit:
 Freight Terms: Prepay & Add Payment Terms: 30 NET Freight Carriers:
 Comments: []

List Lines Secondary Price List Qualifiers

Product Context	Product Attribute	Product Value	Product Description	U
Item	Item Number	CN82441	Sentinel System	E
Item	Item Number	OC87740	Motherboard Option Class	E
Item	Item Number	OC86661	PC Chassis Option Class	E
Item	Item Number	CM33458	Desktop Chassis - Model A223	E
Item	Item Number	CM34788	Network Interface Card (10/100 M	E

Price Breaks Pricing Attributes

Line Item Context Item UOM Item Description Item Price

Line	Item Context	Item	UOM	Item Description	Item Price
1	Internal Item Num	AS54888	Ea	Sentinel Standard Desktop	18-JUN-2003

Actions Contract Terms Price List Setup Submit Draft

3. Sales Order Creation and Entry

- Create Sales Orders Manually or Import from External Systems

You can create a Sales Order Manually in the form shown below. This is just an example but to create a new one just start blank and fill it out and save.

Oracle Applications - ebsdb

File Edit View Folder Tools Window Help

Navigator - Order Management Super User, Vision Operations (USA)

Functions Documents Processes

Orders, Returns: Sales Orders

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

Pricing and Availability

+ Shipping

+ Customers

+ Scheduling

- Setup

+ Orders

+ Items

+ Bills

+ Financials

+ Sales

Quote (Vision Operations) - 1031, General Technologies

Order Information Line Items

Default

Main Others

Customer General Technologies

Customer Number 1007

Customer PO

Customer Contact Richards, Peter

Blanket Number

Ship To Location SanJose (OPS)

320 N First St

SAN JOSE, CA, 95103, US

Bill To Location San Jose (OPS)

320 N First St

SAN JOSE, CA, 95103, US

Order Number

Order Type Mixed

Date Ordered

Price List Corporate

Salesperson Lewis, Mr. David

Status Offer Expired

Currency USD

Subtotal 67,957.50

Tax 0.00

Charges 0.00

Total 67,957.50

Actions Related Items Configurator Availability Book Order

Open

To import from an external system a custom approach might be needed. First define the customer, pricing, items that will be imported as shown in the questions above. Then I would create a program that loads the data from the external sources into a staging table. Then I would create another program that validates all this information and if everything is ok, I would load it into the sales order interface table. Finally, I would write another program that would move the validated data into my base table. All these programs would be run as concurrent programs and if sales orders came in large volumes, I would schedule the programs to run at times that make sense to not overload the system.