

INTERNAL SALES ORDER

ISO is required when there is a shortage of an item in Seattle manufacturing plant (M1) and excess of the same item in Boston plant (M2).

So transfer the material from M2 to M1 is done by using the internal requisition/internal sales order.

Functional setups:

1. Create item:

Navigation

Inventory module → items → master items

--select organization v1 vision operations.

--enter item name and description

Cm334455 as item name

Goto tools copy from: apply the 'purchased item' template

Goto order management tab and select the check box for internal orders enabled
And save it.

Goto tools → organization assignment enable for M1 and M2
Save it.

2. Create material cost in source org M2 for the new item:

Navigate:

Goto change organization → select M2 as organization

Goto costs → item costs

--click on new

--enter the following information

Item: cm334455

Cost type: pending

Then click on open button

--click on 'costs' button

Enter the following details

Cost element: material

Sub element: material

Basis: item

Rate or amount: 500

--save it

3. Update cost:

Navigation:

Goto costs→standard cost update→update costs

--enter the following data in parameter window

Cost type: pending

Account alias: std.cost.var (01-520-5390-000-000).

Description: any suitable description

Item range: specific item

Sort option: item

Update option: overhead, resource, activity, and item costs

Specific item: cm334455

--leave the other parameter values as default, and submit the concurrent request.

--goto view→requests→verify the concurrent has completed successful.

4. Verify the material cost been updated or not for an item

Navigate:

Goto costs→items costs

--enter the following details

Item: cm334455

Cost type: frozen

Click on find

--verify that a row exists with correct details.

5. Internal customer setup:

Check the setup for the internal customer (this is already done in vision environment).

Navigate:

Order management vision operations

--goto customers→customers

Provide the name as vision and a/c number as 1021 and find

--place the cursor on the customer address starting with
3455 108th avenue, seattle→click on details

--select the business purpose tab

--select the ship to radio button & click on details

--verify the sales person as

No sales credit

--notice the following information on the internal block

Location—M1 seattle

Organization—seattle manufacturing

It acts as internal customer

6. Shipping network setup b/w M2 and M1

Verify network for internal organization shipping network b/w M2 and M1.

Navigate

Inventory

Goto setup→organizations→shipping networks

Click on find

--place the cursor in the M2 to M1 row (this row will already exist in a vision environment) and verify the following or make the change where needed

Transfer type: intransit

Fob: receipt

Receipt routing: direct

Internal order required: checked

--save the record if any changes were made.

7. Define inter-location transit times:

Navigate:

Inventory

Goto setup→organization→inter location transit times

Goto view →find→ enter following details

Origin type: location

Origin: M2 boston

Destination type: location

Destination: M1 seattle

--enter the following details

Shipment method: airborne

Intransit time: 5

Default method: check

8. Make sure the inventory accounting periods are open for M1 and M2

Navigate:

Inventory

Goto change organization and select M1 and M2 as necessary

Goto accounting close cycle→inventory accounting periods

--verify the sysdate is in a open else open the same by clicking on button “change Status” and click ok to question “open period”.

9. Do a miscellaneous receipt to create on hand quantity for the item in M2

Navigate:

Inventory

Goto change organization→select M2

Goto transaction→miscellaneous transaction→enter the following information

Time: sysdate

Type:

Click on transaction line buttons

Enter the below information

Item: cm334455

Sub inventory: FGI

UOM: ea

Quantity: 300

Account: select the account alias miscellaneous
(01-580-7740-0000-000)

--save record

Goto on hand, availability→on hand quantity and verify the on-hand quantity for the item purchasing setups

10. Verify the transaction type and order source (this is already done in vision environment)

Navigate

Purchasing

Goto setup→organization→purchasing options

--verify the following details under “document defaults”

Internal revulsion- mixed

Internal requisition order source—internal

This internal sales order will be imported into OM with this order source.

FLows STEPS

1. Create an internal requisition and approve:

Respo: purchasing, vision operations (USA)

Navigate:

Goto purchasing→requisition→requisition→type: internal requisition

Place the cursor in the destination region (lower left fields) and enter following

Organization: Seattle manufacturing

Location: M1-seattle

Goto lines and enter the item

Item: cm334455

The destination type and source should both automatically change to inventory and Sub inventory fields should now be visible in edit mode in the both regions.

Go back to destination region→sub inventory: FGI

Goto source region and enter organization: Boston manufacturing

Verify that, at this point the price in the lines region changes to the item cost, setup Done in the setup steps 1 to 4 (item cost in M2)

Sub inventory→FGI

In the lines region, enter the following information

Quantity: 10

Need by date: sysdate+10

Save it. Note the requisition number

Submit the requisition number for approval and check status. Click on approve button And then ok

Goto →requisition→requisition summary→query with requisition number and verify The status approved.

2. Run the create internal orders concurrent program:

This process inserts the data from PO into OM interface tables.

Navigate:

Purchasing vision operation

Goto reports→run

Run the “create internal orders” concurrent program

Goto view→requests and verify that the concurrent program has completed successfully.

3. Run the order import process:

This process will pull the data from OM interface tables into OM

Navigate:

Order management super user, vision operation (USA)

Goto order, returns→import orders→order import request

--select the following parameter values and leave the rest default

Operation unit—vision operation

Order source—internal

Order reference—enter the requisition number

Validate only—no

Leave other fields as it is

--submit this concurrent request

--goto view→requests and verify the presence of parent and child requests, and that they have completed successfully.

--view the o/p of the child request by clicking on the view o/p button. There should be an indication on the successful import and creation of the internal sales order.

--here our order will automatically become booked.

4. View the created internal sales order information:

Navigate:

Order management

Goto order, returns→order organizer

Query the internal sales order by entering

order source: internal

requisition number: enter the internal requisition number from step 1 or enter the requisition number under order source.

Click on open button(or else query in lines tab with item nuber)

In the order information tab and main subtab, verify the following information

Order type: mixed (this is delivered from the last functional setup)

Customer: vision, with customer number 1021.

Price list: corporate

Status: booked

In the order information tab and other subtab, verify the following
Order source: internal (this is derived from the last functional setup)
Order source reference as: enter internal requisition number

In the line items tab, and main subtab, verify the following
Order item: cm334455
Quantity: 30
UOM: ea
Unit selling price: 5000 (from item cost setup)
Request date: sysdate+10
Status: awaiting shipping

In the line item tab, shipping sub tab verify
Schedule ship date +5 =schedule arrival date
This is derived from setup 7 inter location transmit lines

Note down the order number.

5. Pick release the internal sales order:

Navigate:

Order management

Shipping→release sales orders→release sales order

In the order tab

Order number→enter order num

Scheduled ship dates→leave from/to as blank

Requested dates→leave from/to as blank

In the inventory tab

Ware hour→M2

Auto allocate→yes

In the shipping tab

Autocreate delivery→ yes

Auto pick confirm→yes

Click on execute button to submit the pick release process and shipping automatically. (in 11i we have to do shipping manually)

Here it will submit the below programs automatically

Pick slip report

Shipping exception report

Bill of landing

Packing slip report

Commercial invoice

Vehicle load sheet details

Interface trip stop

Auto pack report

Auto ship confirm report.

(description of each program we can find in standard o2c cycle)

(in 11i –ship confirm internal sales order

Navigation

Goto shipping transactions

--Select the order number and click on find button

--in the lines/lpn tab, verify that the line status as staged

--goto delivery tab and click on ship confirm button

--click on ok)

6. Verify the status of internal sales order.

--query order in the order organizer and verify the line status is now shipped.

--header level no change

--internal order lines are never interfaced to oracle receivables

7. Now that item has been shipped quantity out of ware house M2, will proceed to receive the shipping quantity in M1.

--change organization M1

-- goto purchasing→receipts→receipts

-- in the requisition field, enter the requisition number and click on find

Both the receipt header/ receipts screen will open

--in the receipts screen, check the check box to the left of the line

-- save the record

Back end query

Requisition, sales order and receipt number


```
SELECT porh.segment1, porl.line_num, pord.distribution_num,  
ooh.order_number sales_order, ool.line_number so_line_num,  
rsh.receipt_num, rcv.transaction_type  
FROM oe_order_headers_all ooh,  
po_requisition_headers_all porh,  
po_requisition_lines_all porl,  
po_req_distributions_all pord,  
oe_order_lines_all ool,  
po_system_parameters_all posp,  
rcv_shipment_headers rsh,  
rcv_transactions rcv  
WHERE ooh.order_source_id = posp.order_source_id  
AND porh.org_id = posp.org_id  
AND porh.requisition_header_id = ool.source_document_id  
AND porl.requisition_line_id = ool.source_document_line_id  
AND porh.requisition_header_id = porl.requisition_header_id  
AND porl.requisition_line_id = pord.requisition_line_id  
AND porl.requisition_line_id = rcv.requisition_line_id  
AND pord.distribution_id = rcv.req_distribution_id  
AND rcv.shipment_header_id = rsh.shipment_header_id  
AND ooh.org_id = posp.org_id  
AND ool.header_id = ooh.header_id  
AND ool.shipped_quantity > 0  
AND ool.orig_sys_line_ref not like '%OE_ORDER_LINES_ALL%'  
AND ool.source_document_line_id is not null  
and porh.segment1='14300'
```

QUESTIONS:

1. Tell me about Internal sales order flow?

