PRESENTATION

By Marian Fekry

ORDER MANAGEMENT SYSTEM FOR GREEN FIELDS

From Order to Delivery: Seamlessly Managed



INTRODUCTION

An order management system designed to optimize sales and product distribution efficiently. It streamlines the order processing cycle, enhances shipment tracking, and ensures accurate item setup and warehouse structuring to support seamless order fulfillment.

DISCUSSION

Optimizing Order Management & Tracking

- Creating Orders in Oracle
- Processing & Approving Orders
- Tracking Shipments & Inventory Updates

IMPLEMENTATION STEPS

Tracking the progress of key setup modules

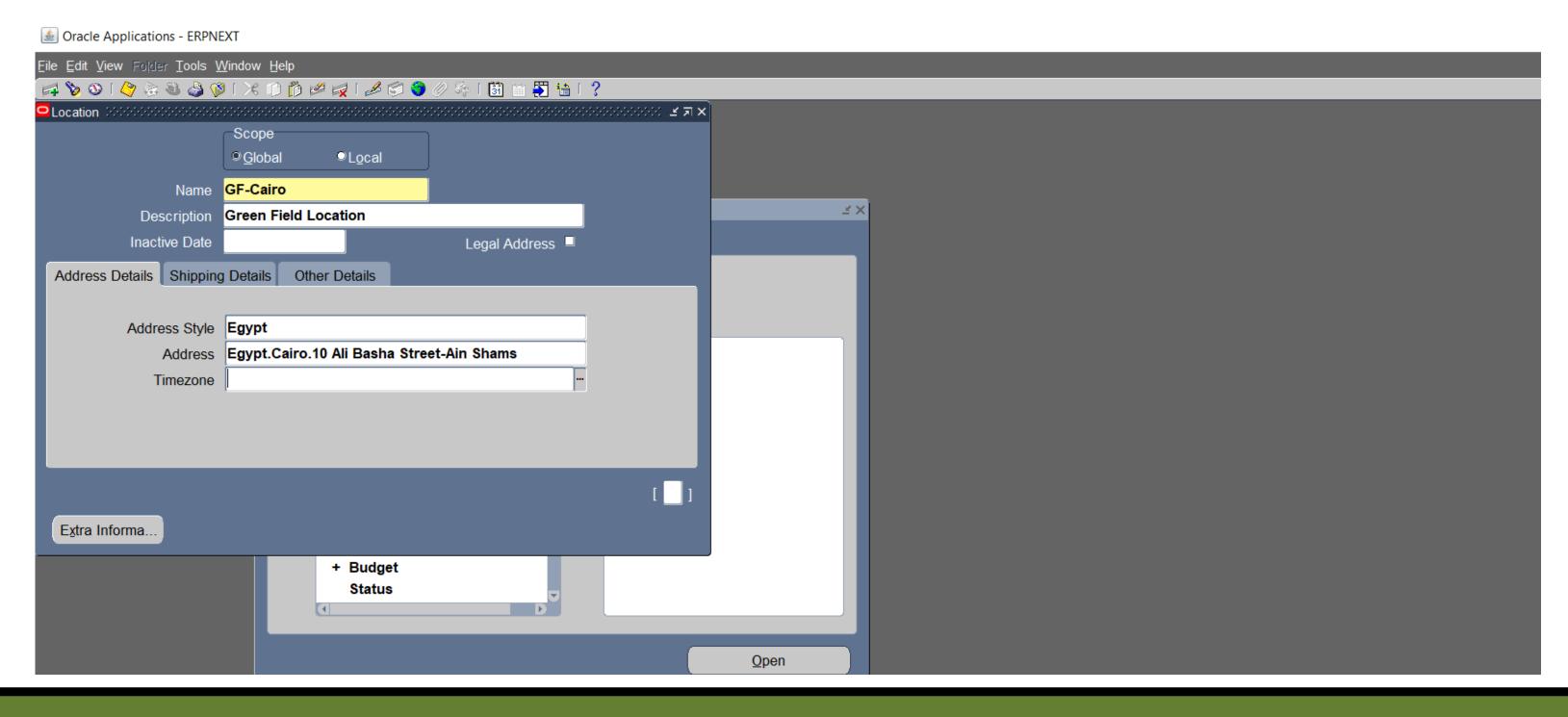
Inventory Setup

- Creating the company and linking legal entity
- Defining warehouses & sub-inventories
- Creating and categorizing items

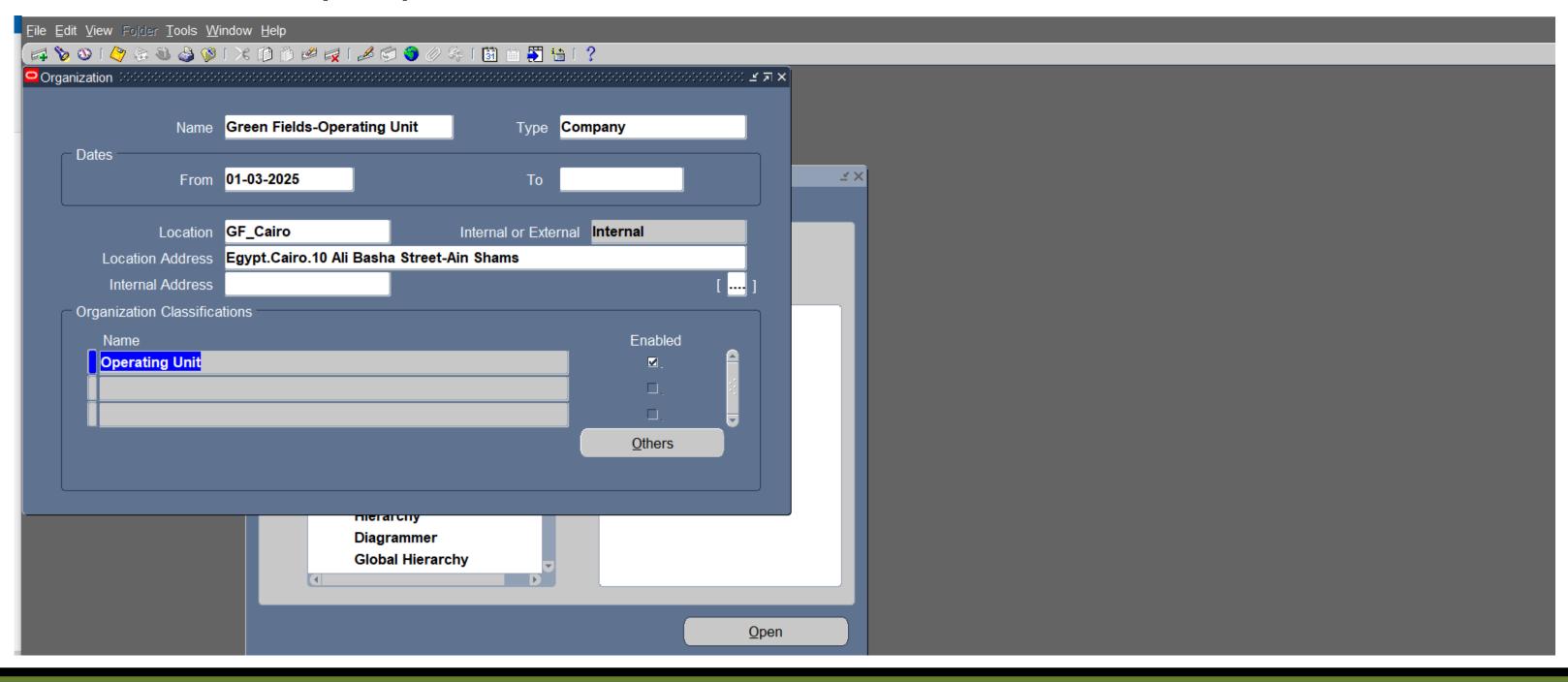
Order Management Setup

- Order Management Configuration
- Master Data & Pricing Setup to Enable Transaction Processing
- Creating Sales Orders
- Allocate & Shipping Setup
- Testing the full order-to-cash cycle

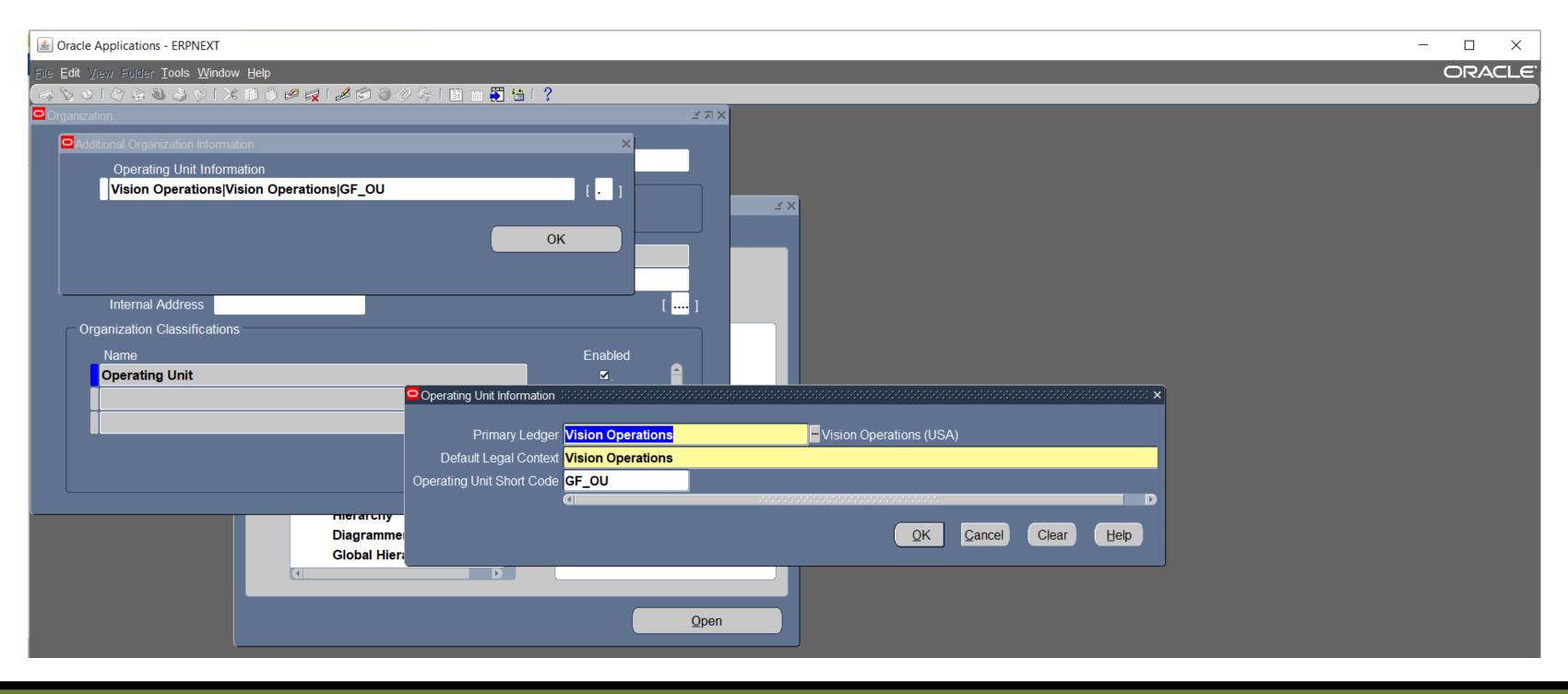
After Adding HRMS Responsibility to the User, a Location Named 'GF-Cairo' Was Created:



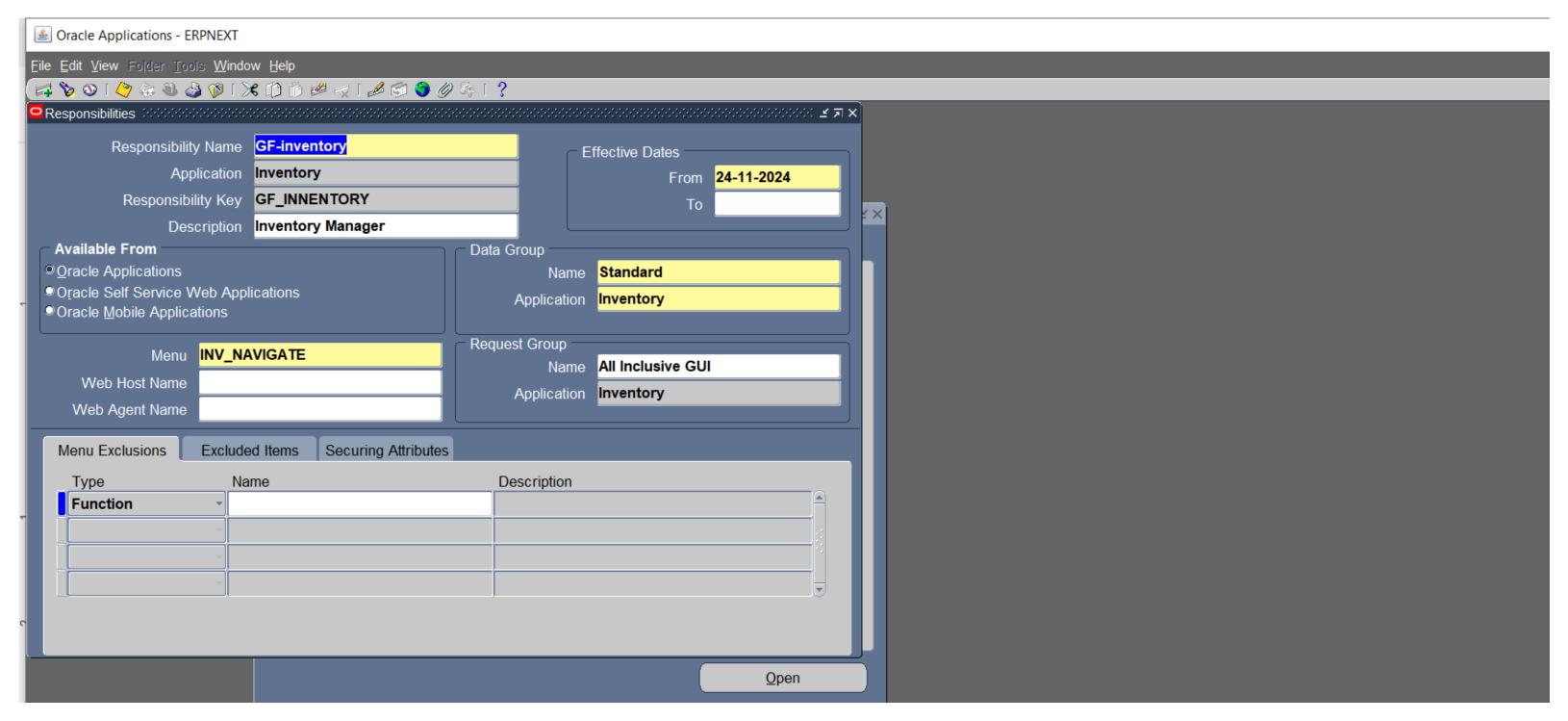
set up an Operating Unit (OU) named 'Green Fields-Operating Unit ', and linked the company to the location:



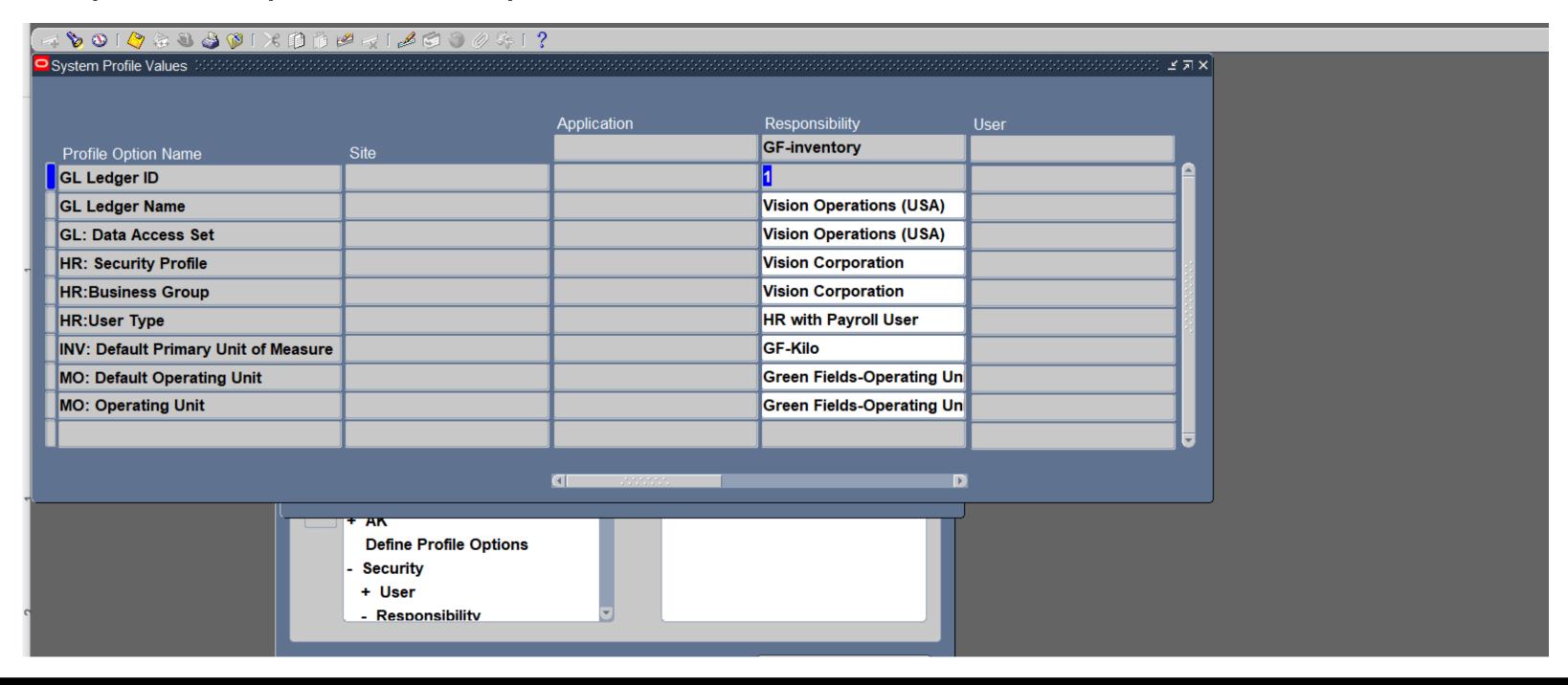
Linking the company to the legal entity:



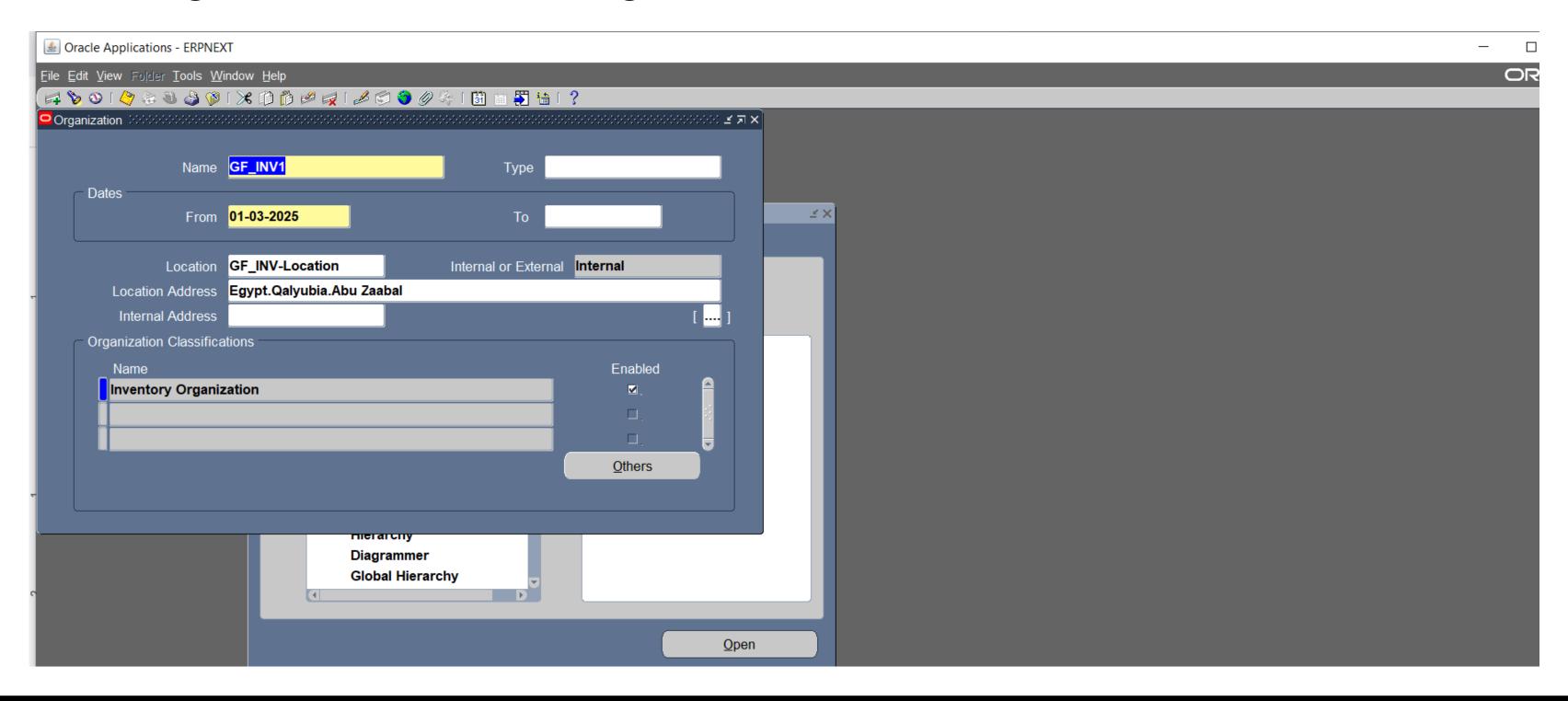
Creating an Inventory Responsibility Named 'GF_Inventory':



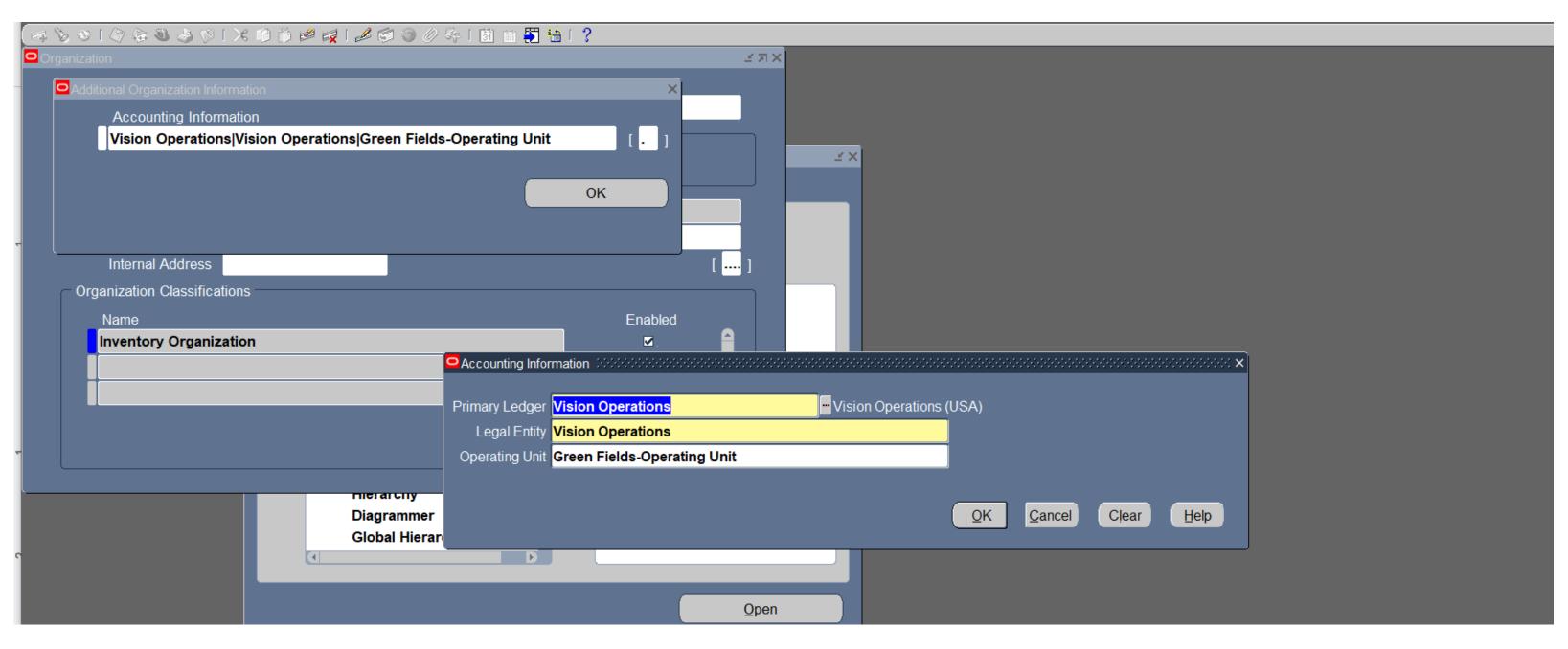
Assigning the required Profile Options to the Inventory Responsibility to enable system functionalities:



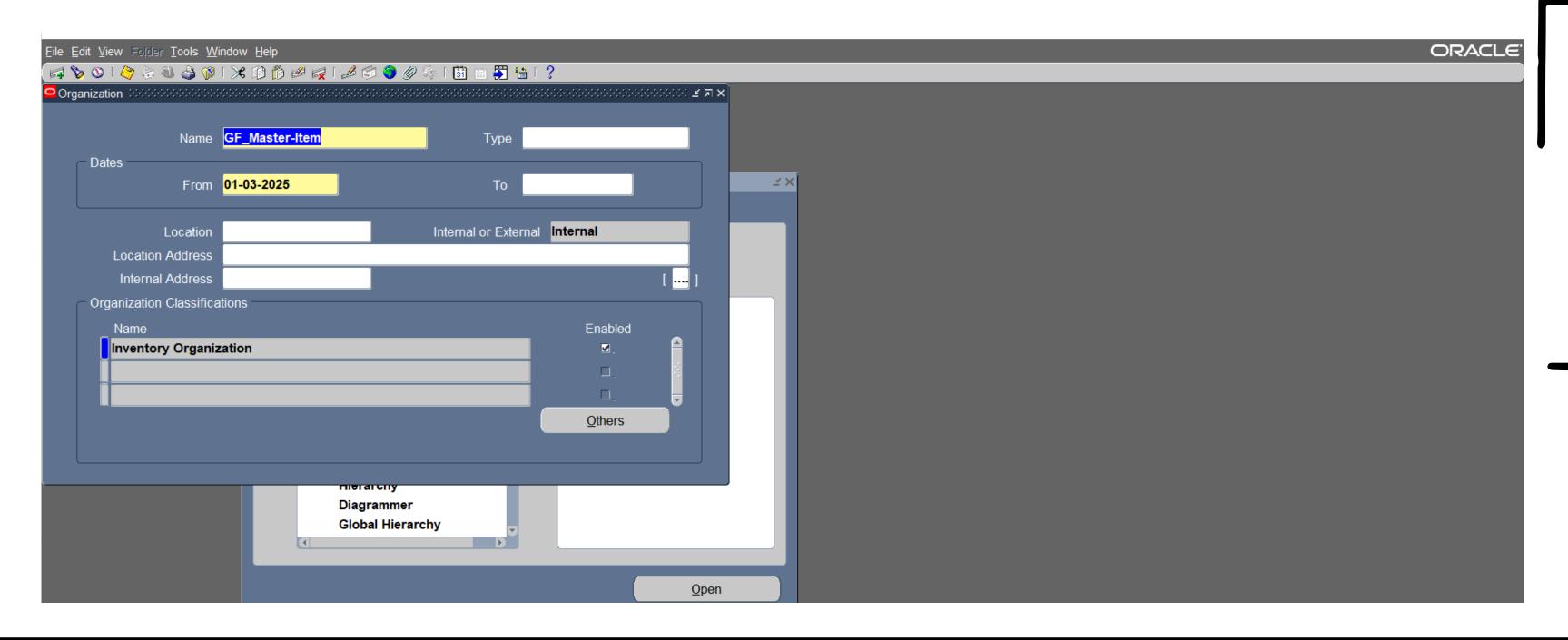
Creating Inventories and Linking Them to the Location:



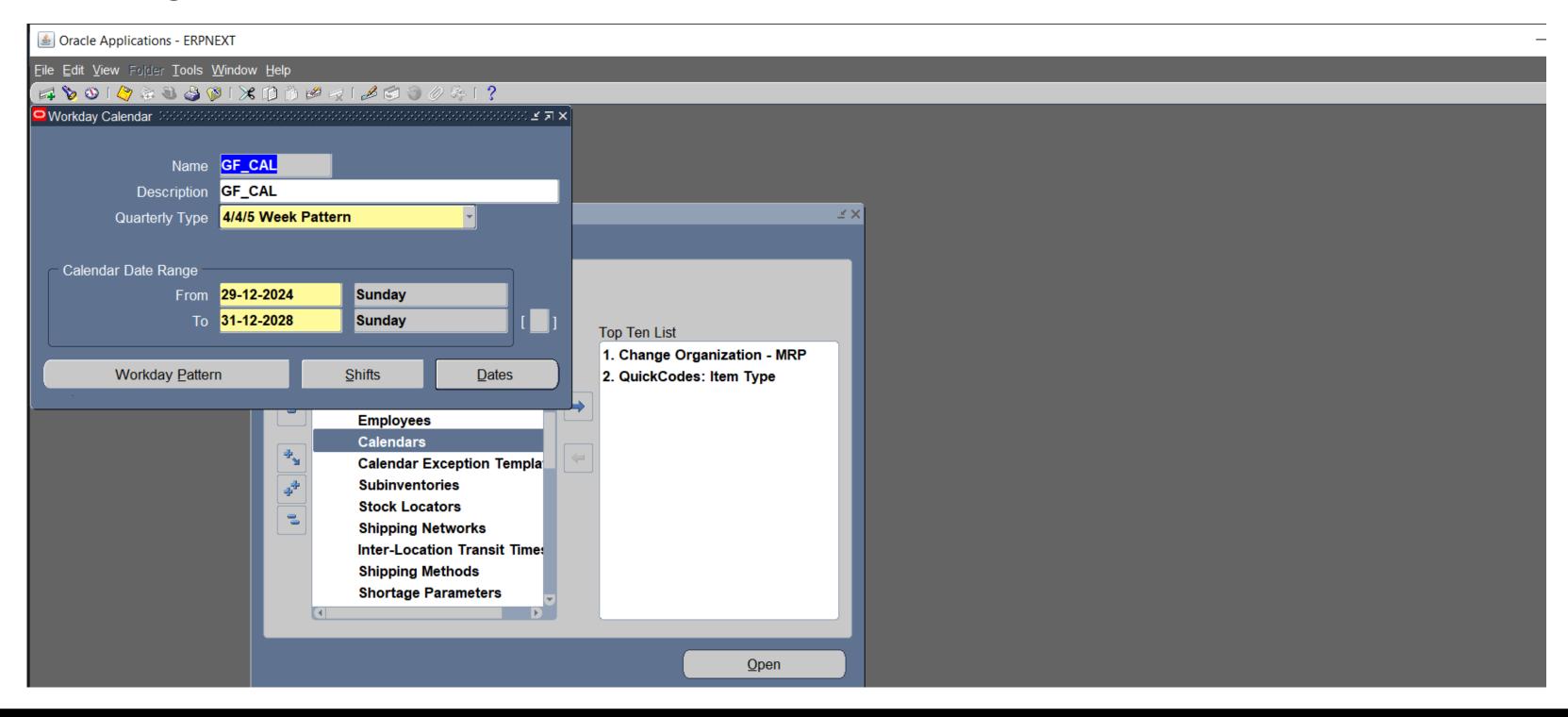
Selecting 'Inventory Organization' as the Classification type, then linking the inventory to the Operating Unit 'Green Fields-Operating Unit':



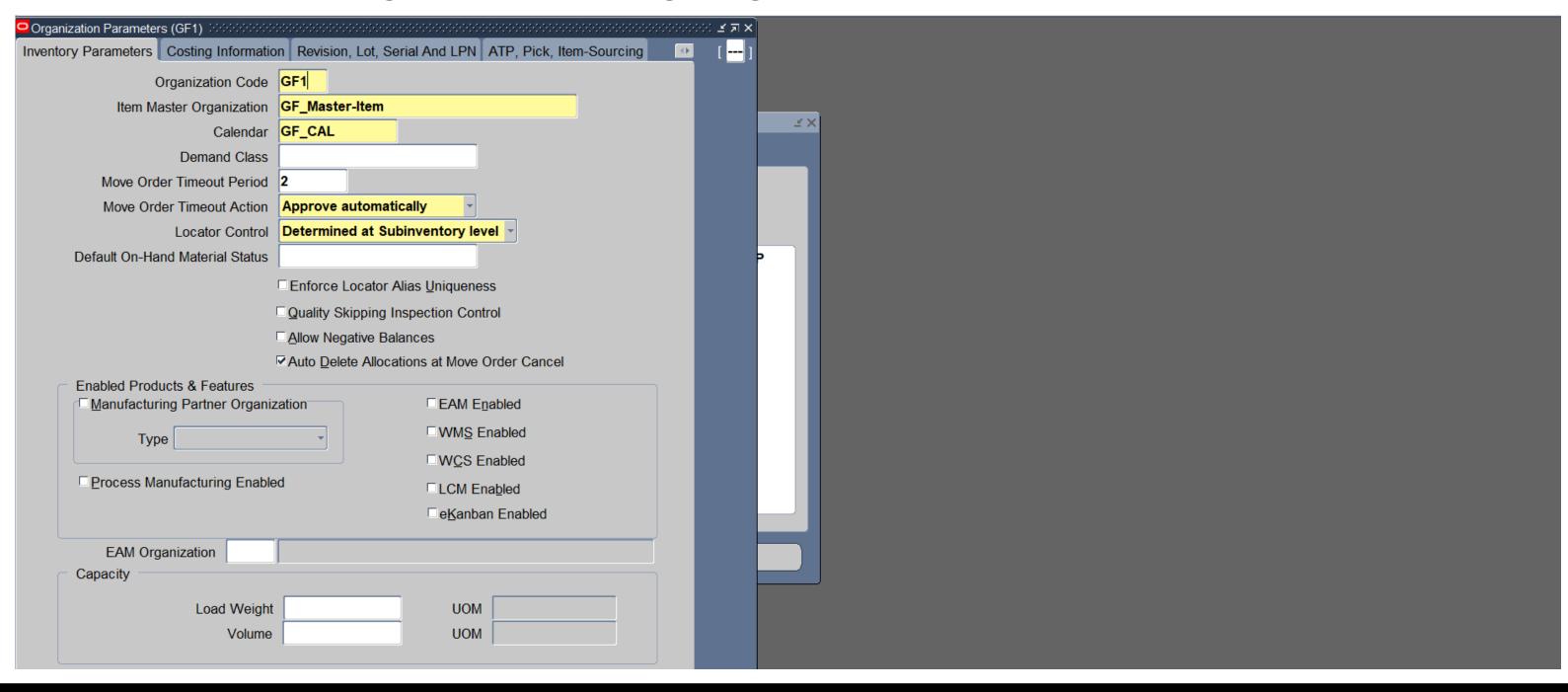
Creating a Master Organization named 'GF-Master Item', a virtual organization used for item code creation:



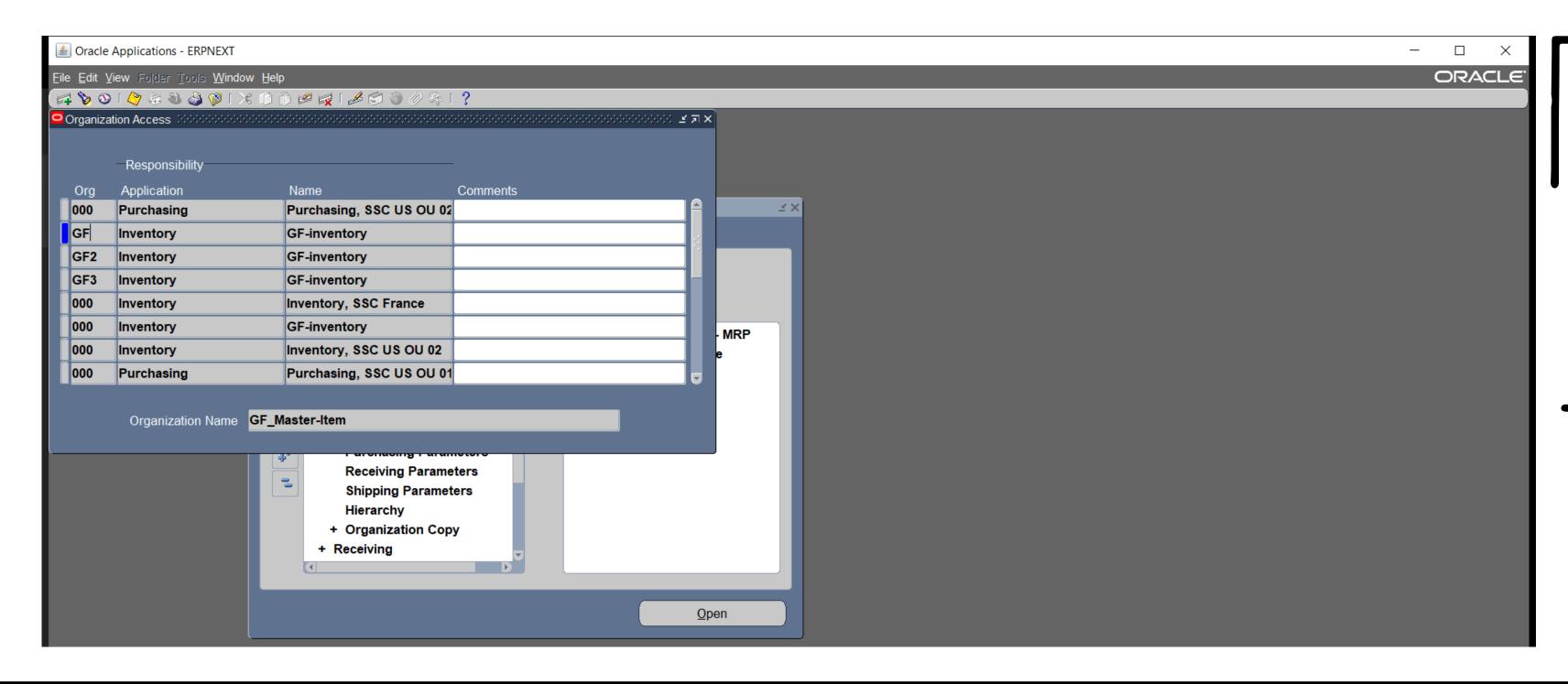
Creating a Calendar named 'GF_Cal':



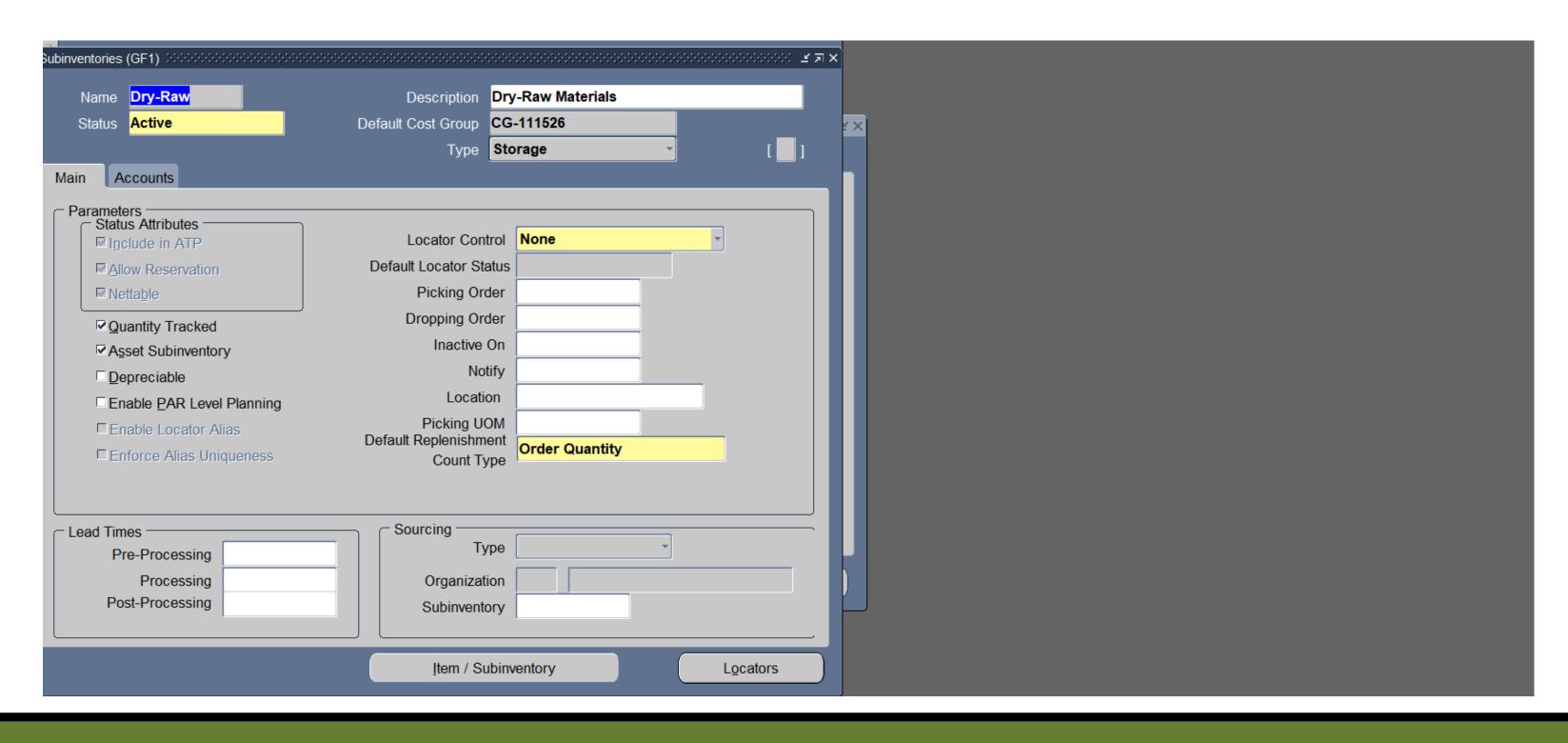
Setting up the Inventory Information, adding the previously created Calendar, and adding the remaining Organization Parameters:



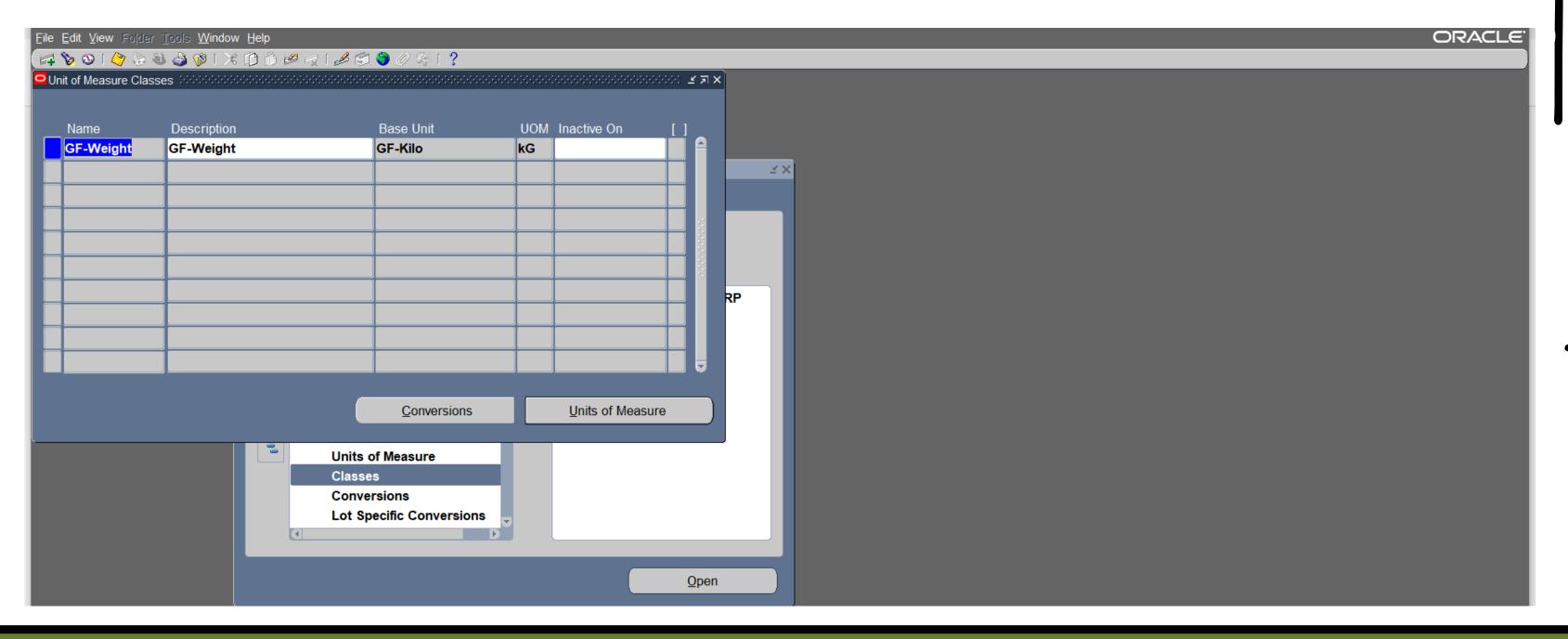
Granting access to a user to be responsible for Inventory Management:



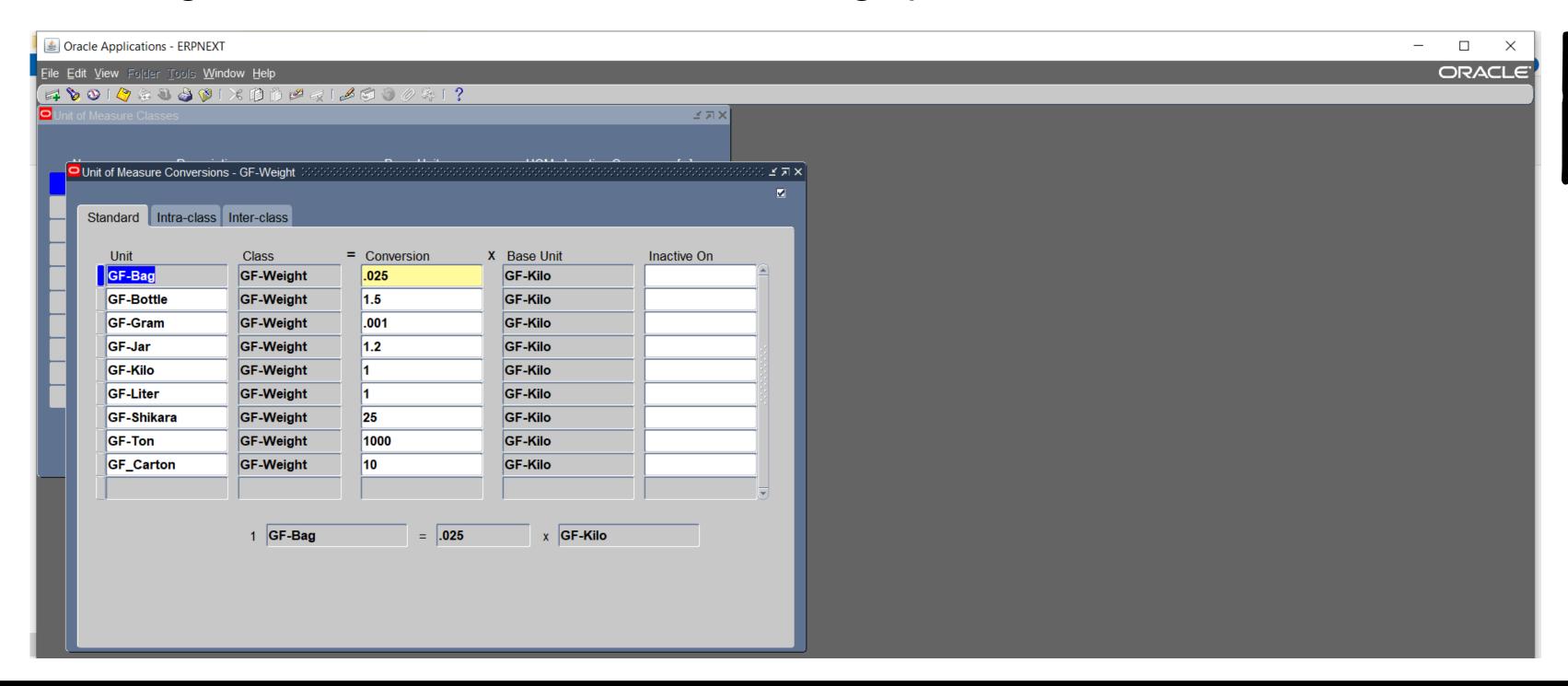
Creating Sub-Inventories for each Inventory Organization:



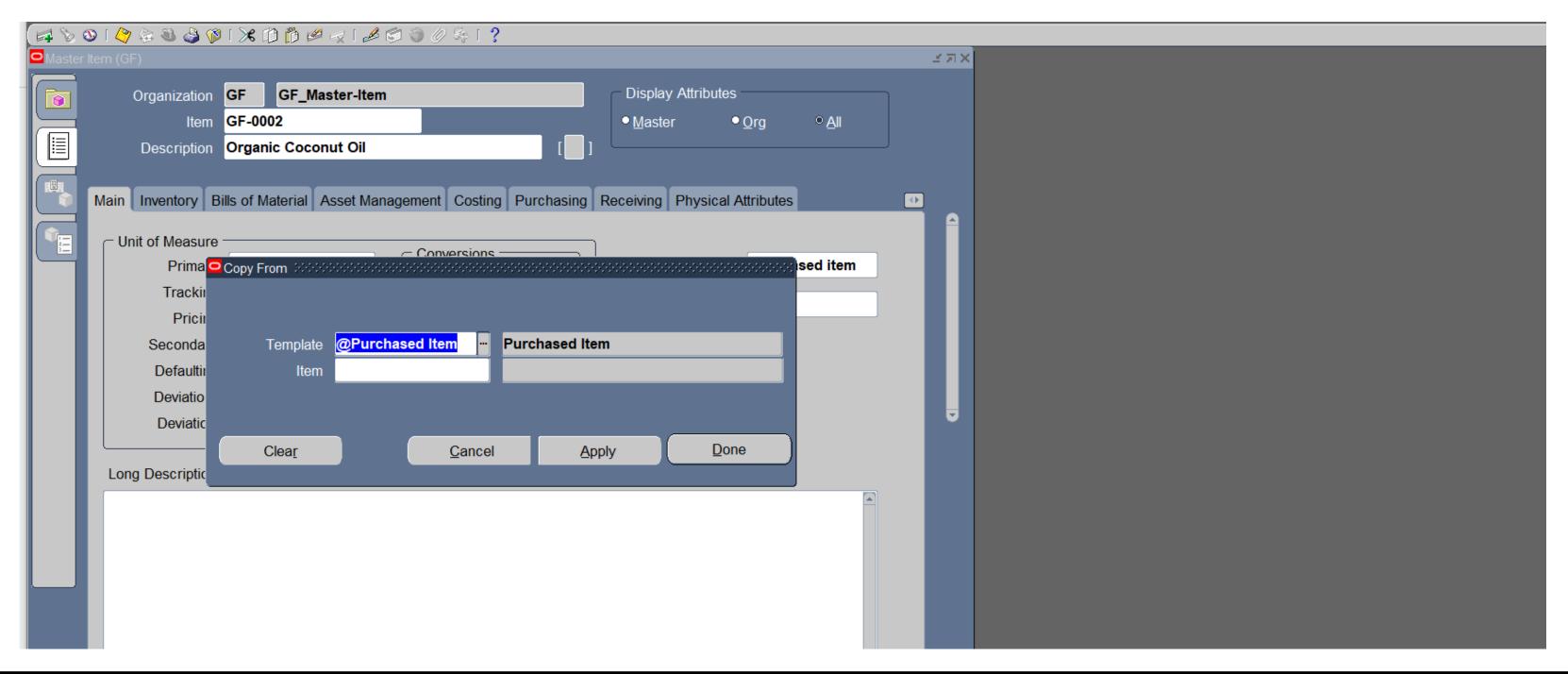
Creating a Unit of Measure (UOM) Class named 'GF-Weight' for UOM setup and adding 'GF-Kilo' as the base unit:



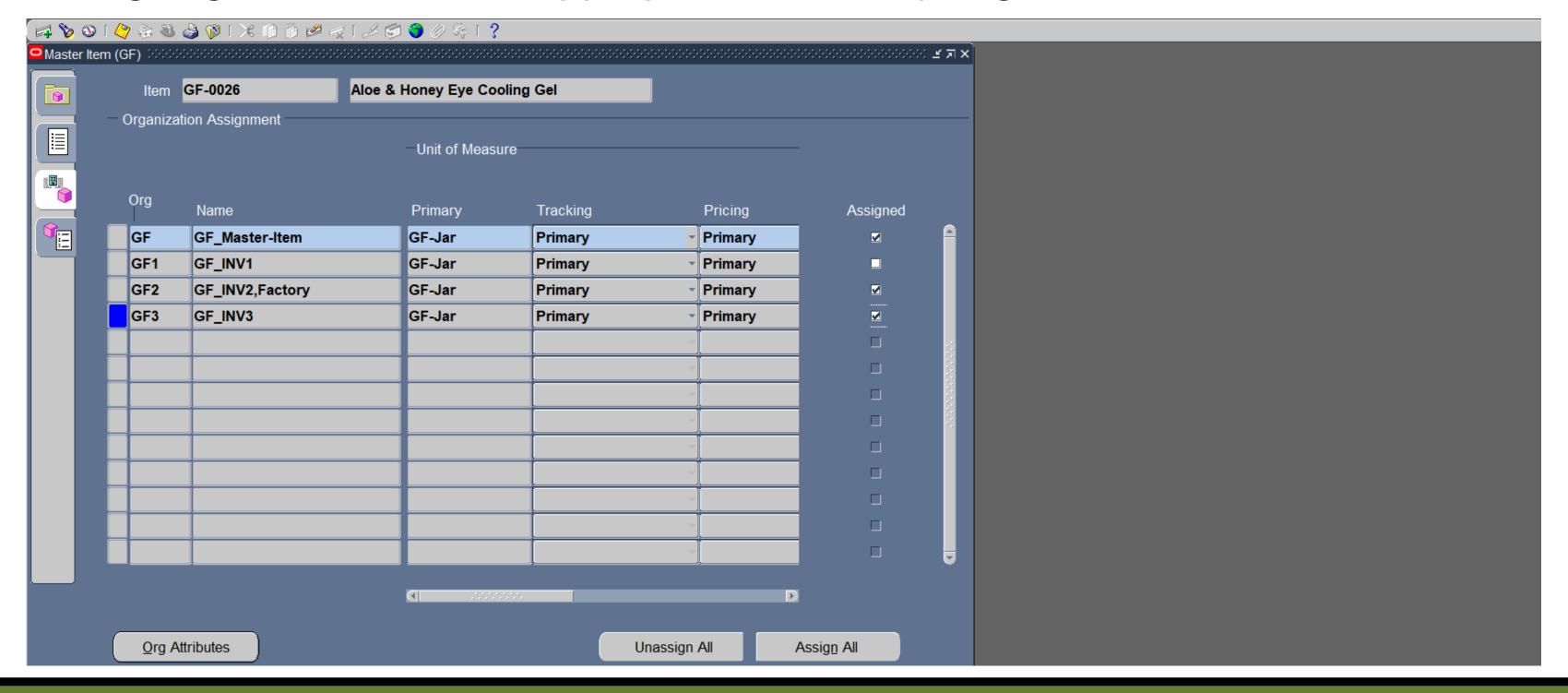
Creating Units of Measure (UOM) and setting up UOM conversions:



Creating the first item 'MF-0002' in the Master Item form and applying the 'Purchased Item' template to it:



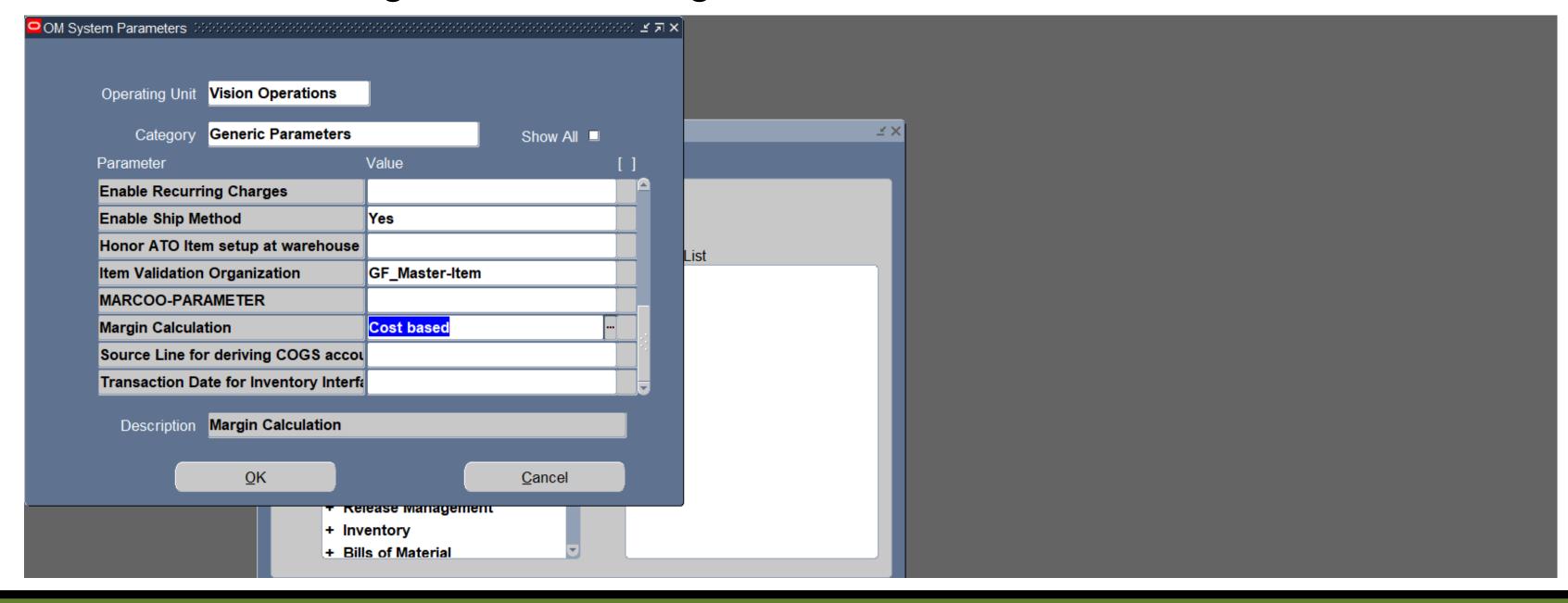
Assigning the items to the appropriate Inventory Organizations:



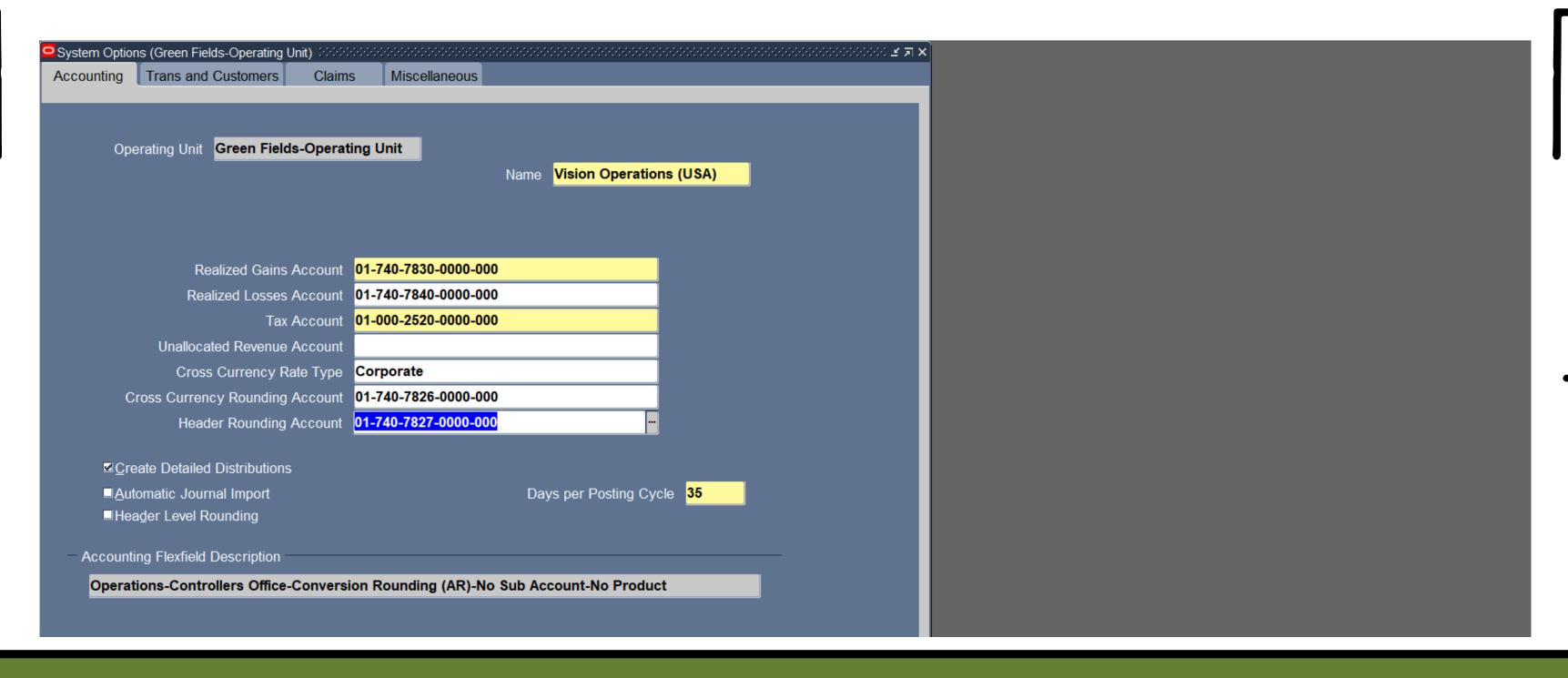
Transition to Order Management Configuration

After completing the Inventory setup, which includes stock management and item handling, we now move on to the Order Management Configuration, focusing on processing orders from creation through to order closure.

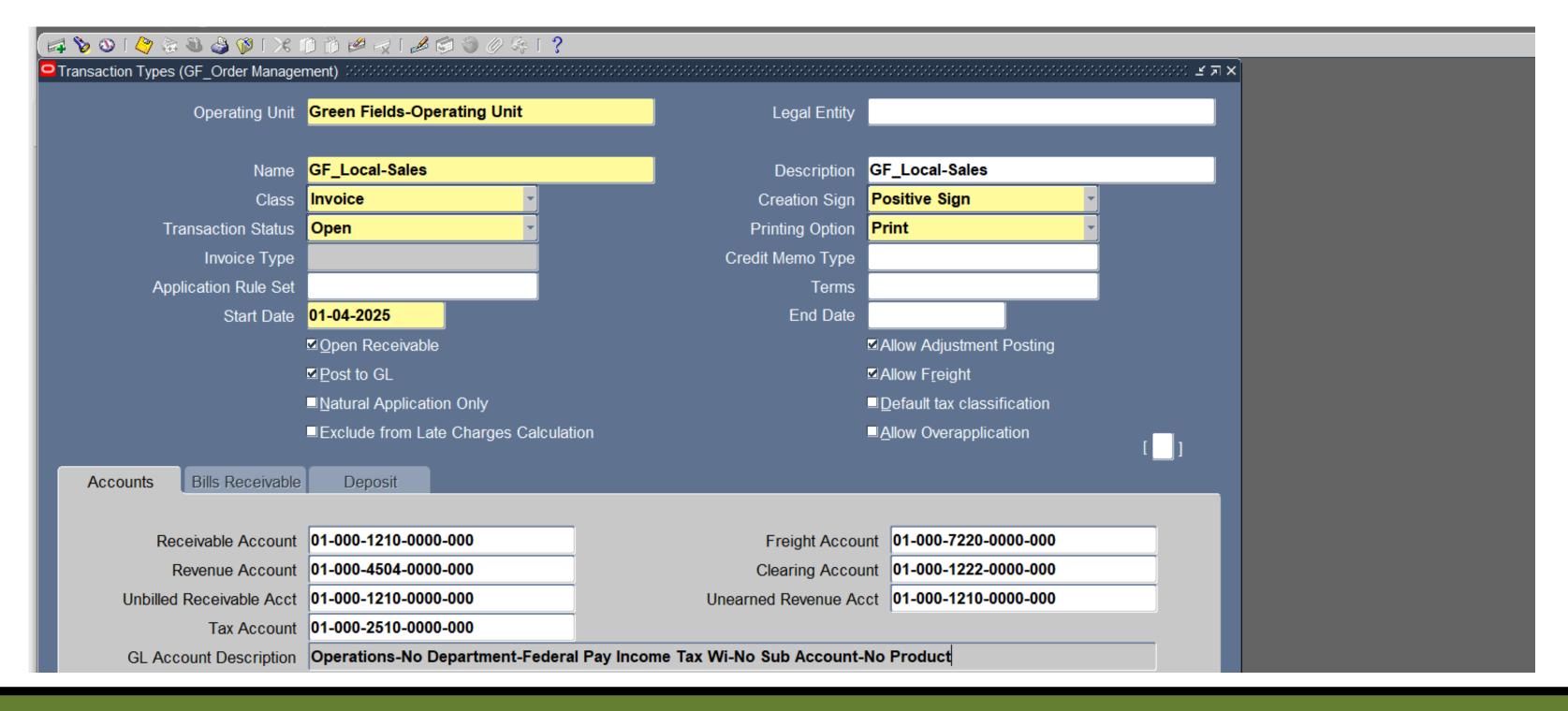
After assigning the required responsibilities (Order Management, CRM Administrator, and Oracle Pricing Manager) to the user and configuring the profile options for each responsibility, the System Parameters were set up to define the foundational settings for Order Management:



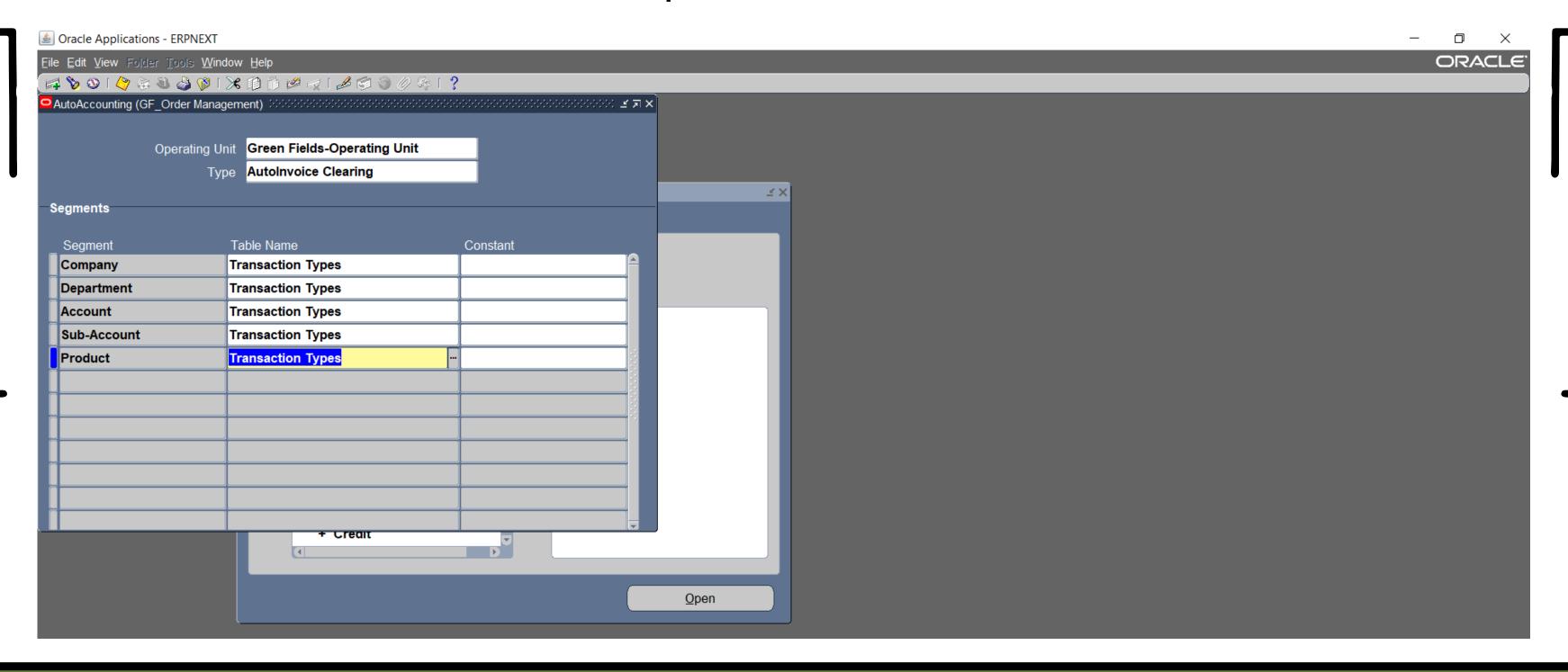
Configuring Receivables Options to define key settings for invoice processing, payment terms, and supported currencies:



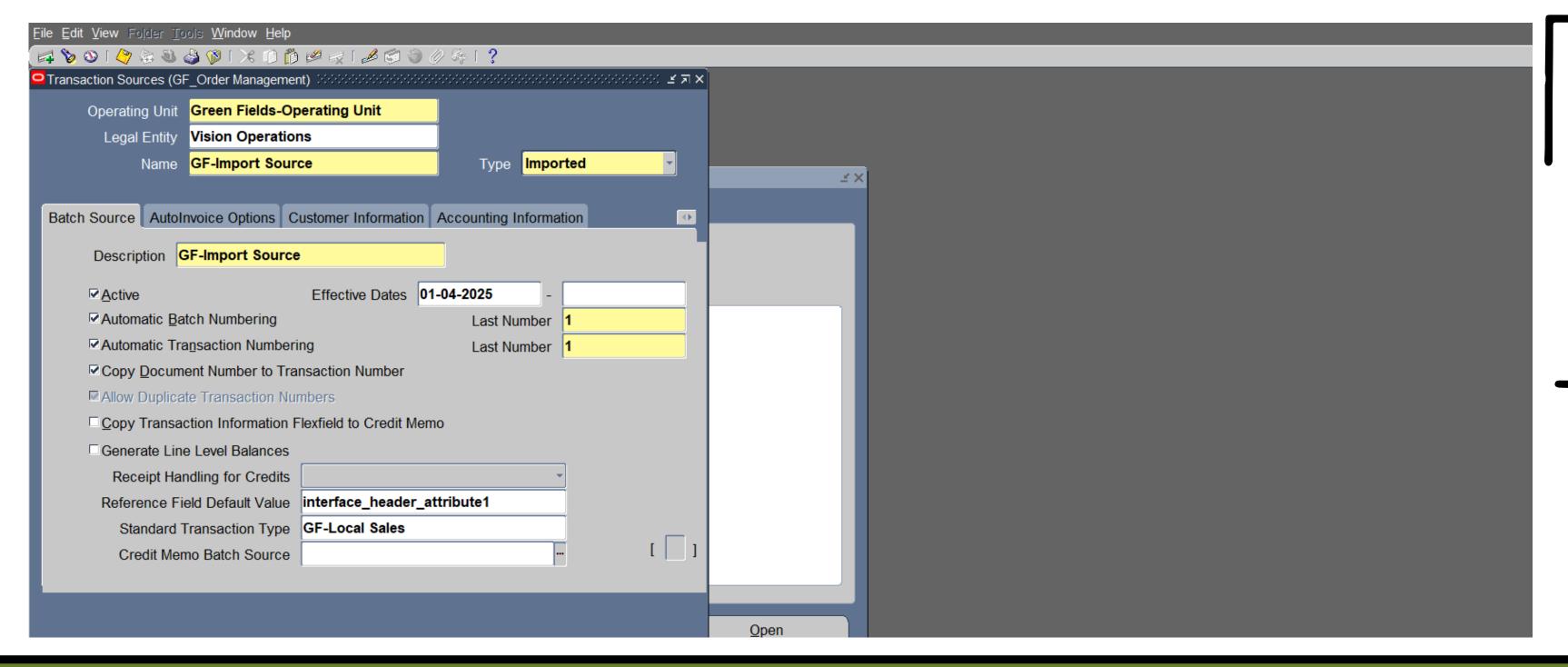
Defining Receivable Transaction Types: Local Sales for domestic transactions and Export Sales for international transactions :



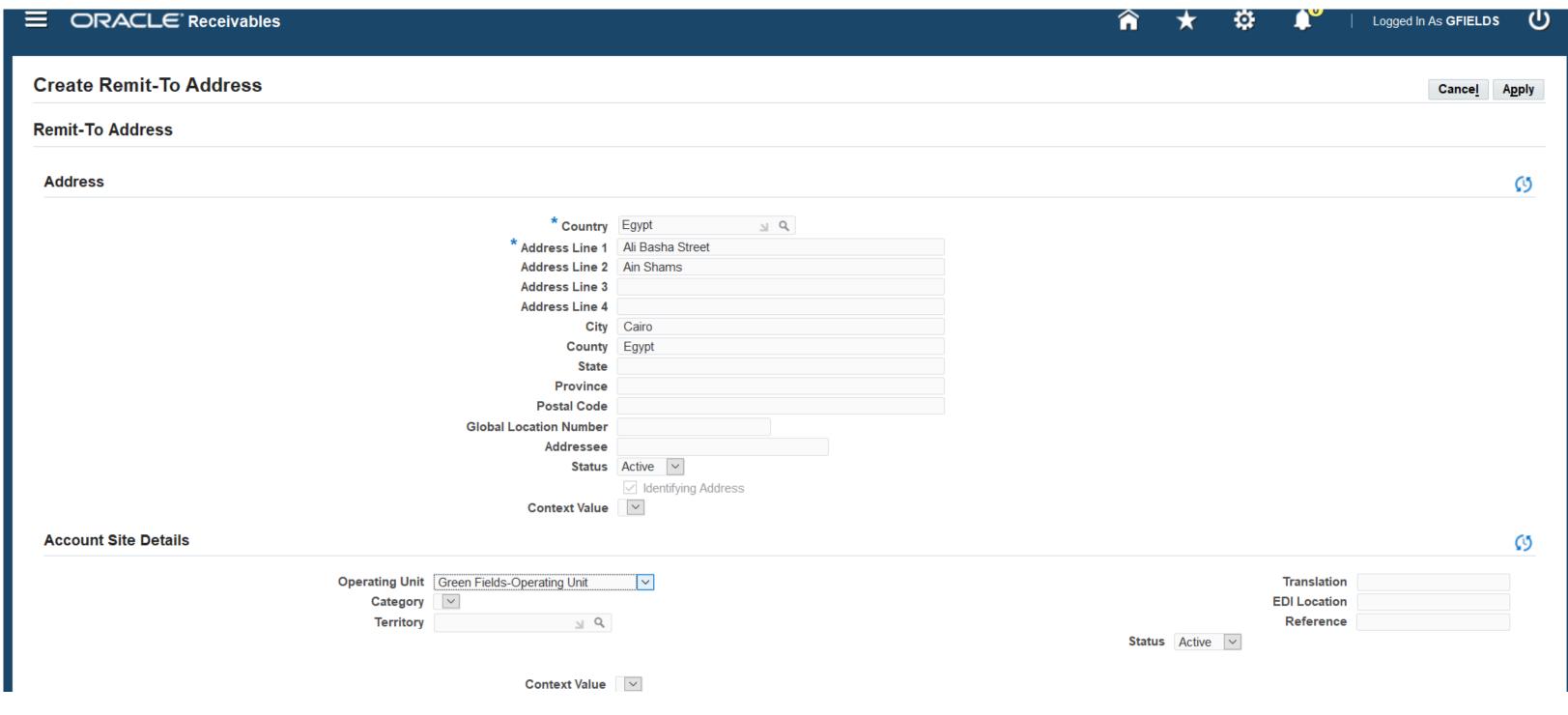
Defining Auto Accounting Rules to automate the posting of transactions to the correct accounts based on predefined criteria:



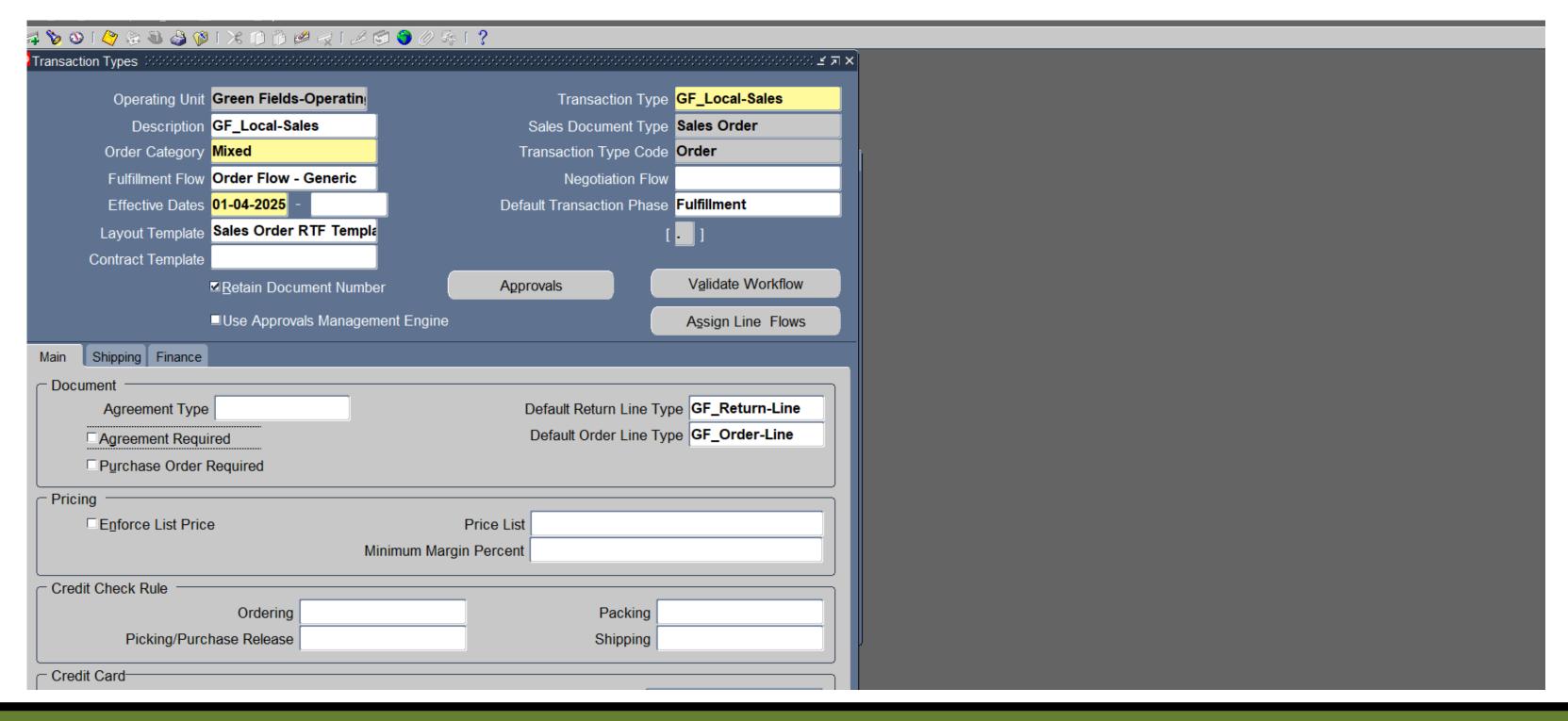
Defining Transaction Source to determine the origin of transactions, such as Sales Orders and Returns:



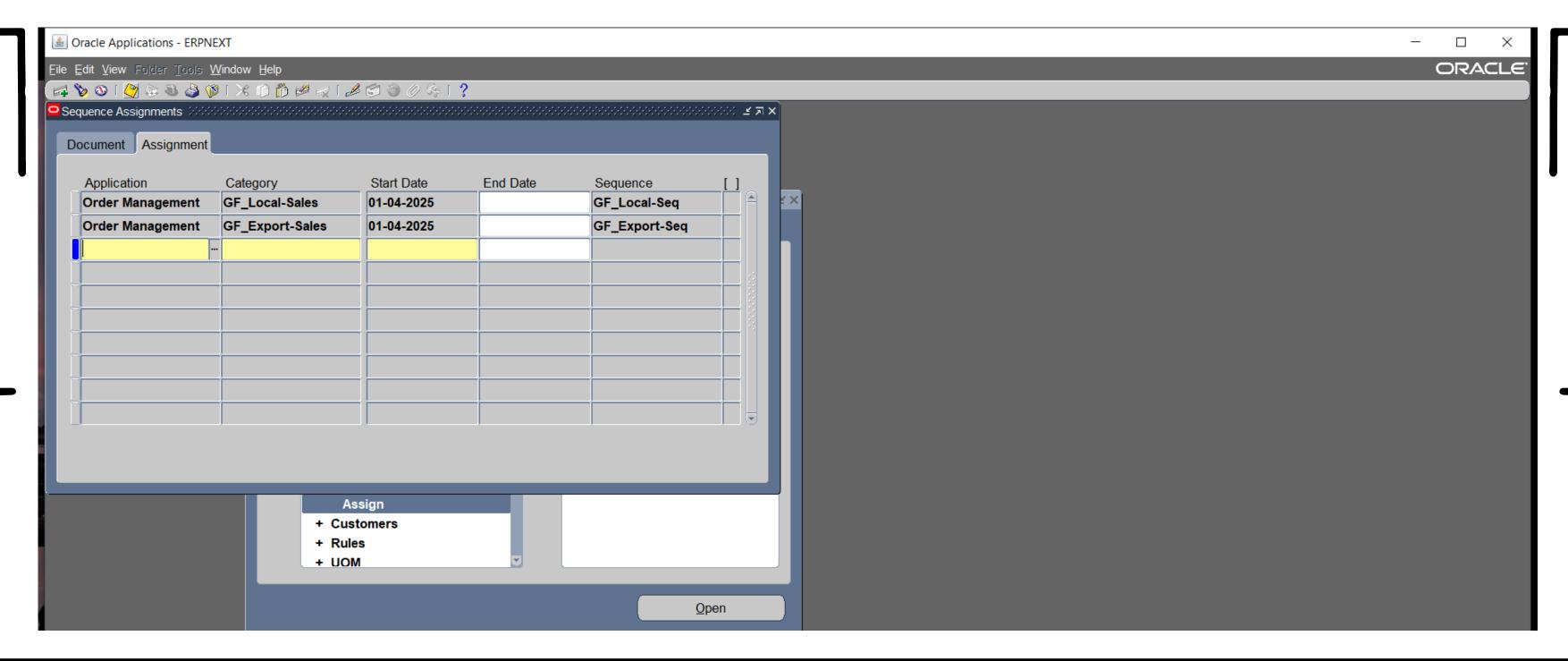
Set up Remit-to Address to specify the location where payments should be sent:



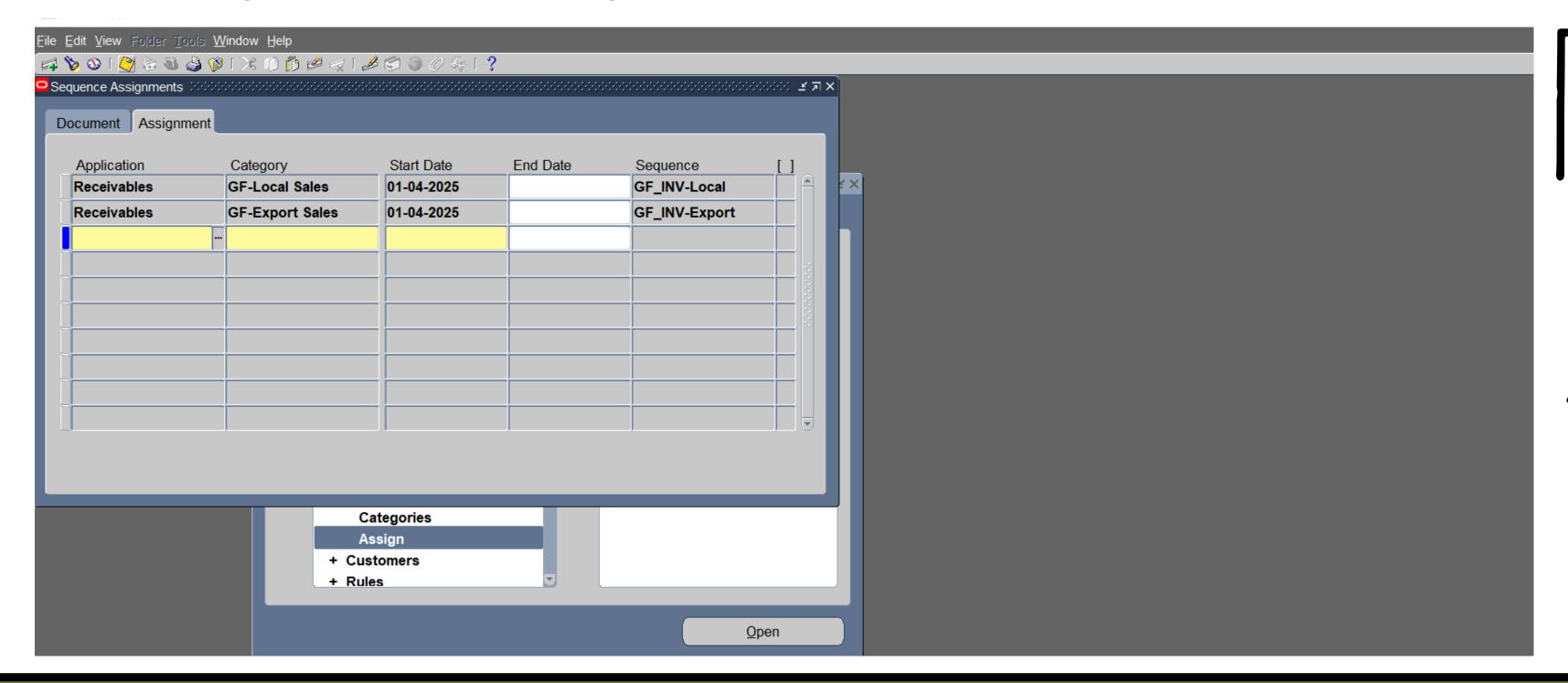
Creating Sales Order Transaction Types for Local Sales and Export Sales to differentiate between domestic and international transactions:



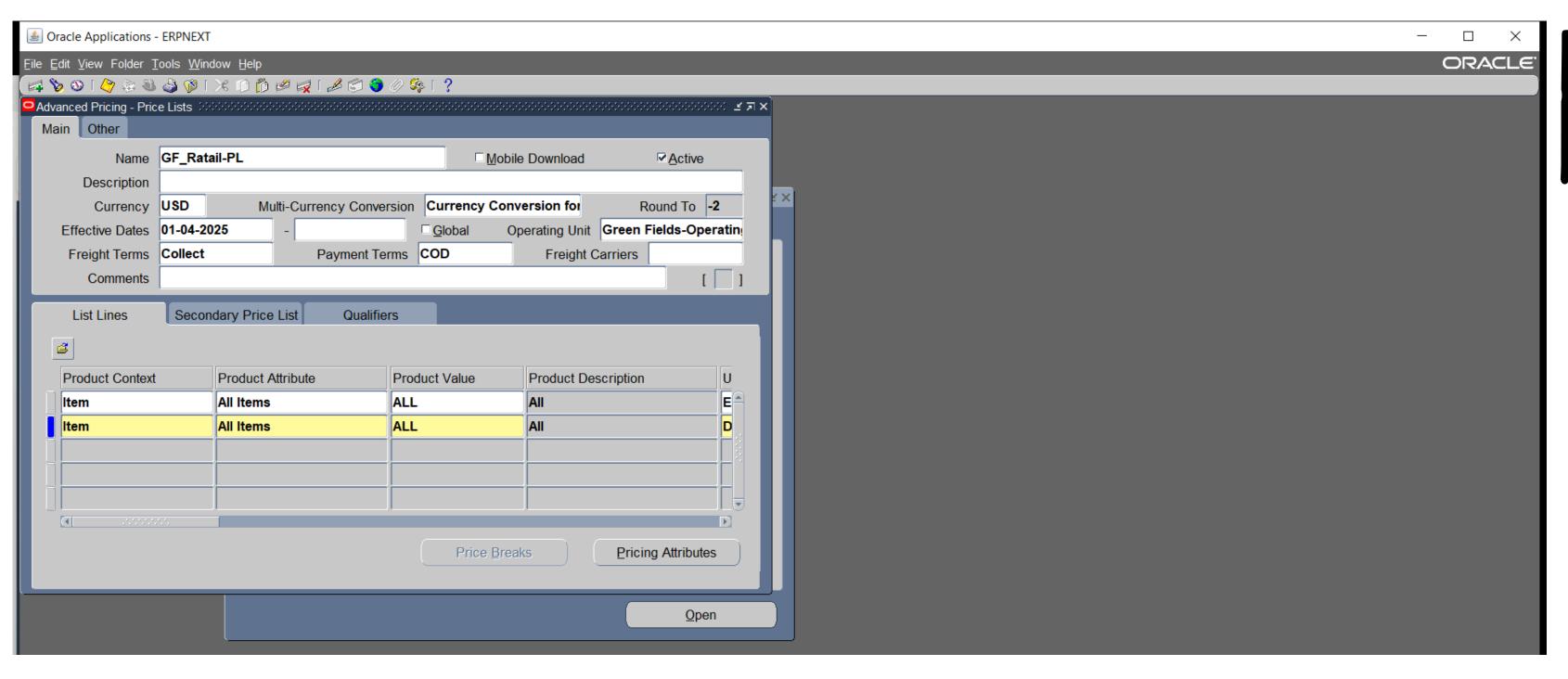
Creating and Assigning Sequence for each transaction type to ensure unique numbering and proper order tracking:



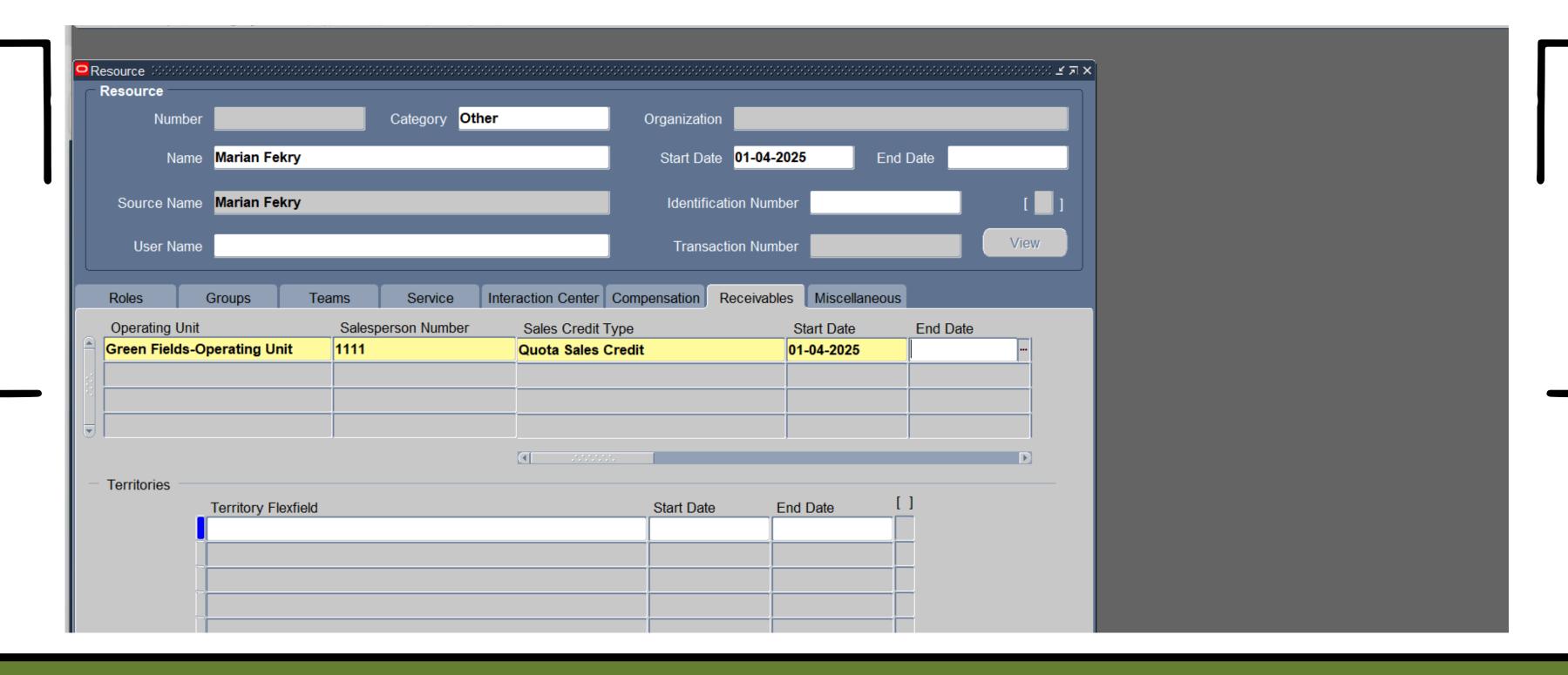
Creating and assigning sequence for Receivables transactions to ensure unique numbering and proper tracking of invoices:



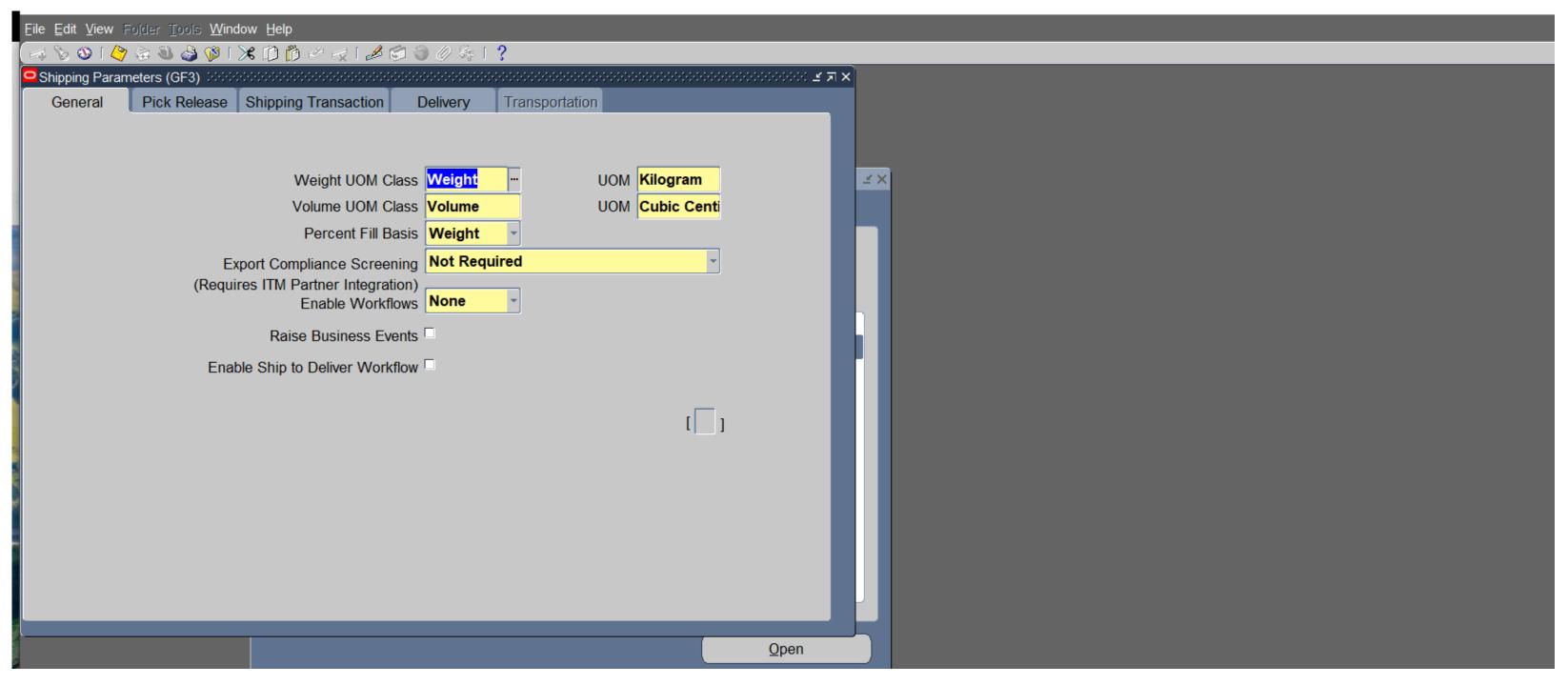
From Order Pricing Manager Responsibility, proceed to creating the Price List:



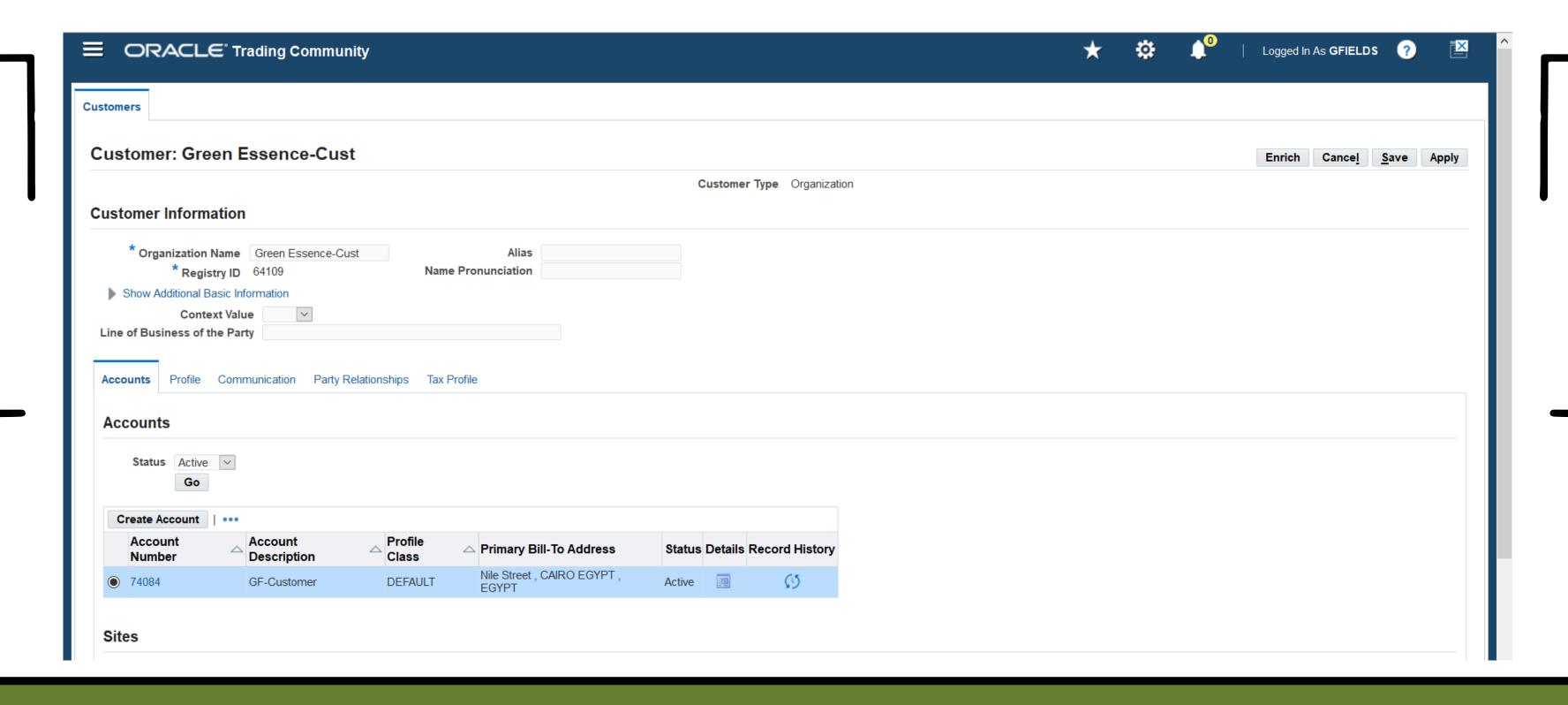
Establishing Sales Person:



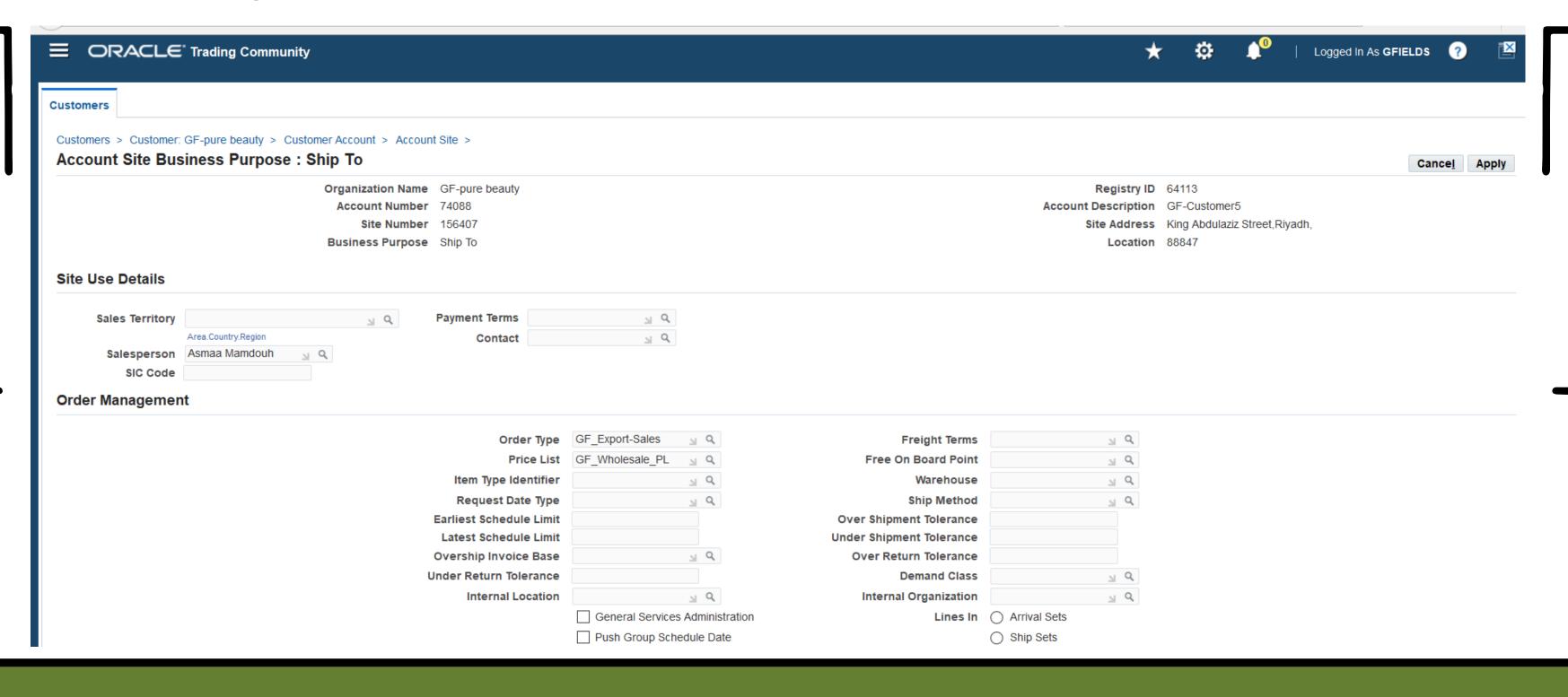
Setting up Shipping Parameters for Inventory after gaining access to the Org Inventories:



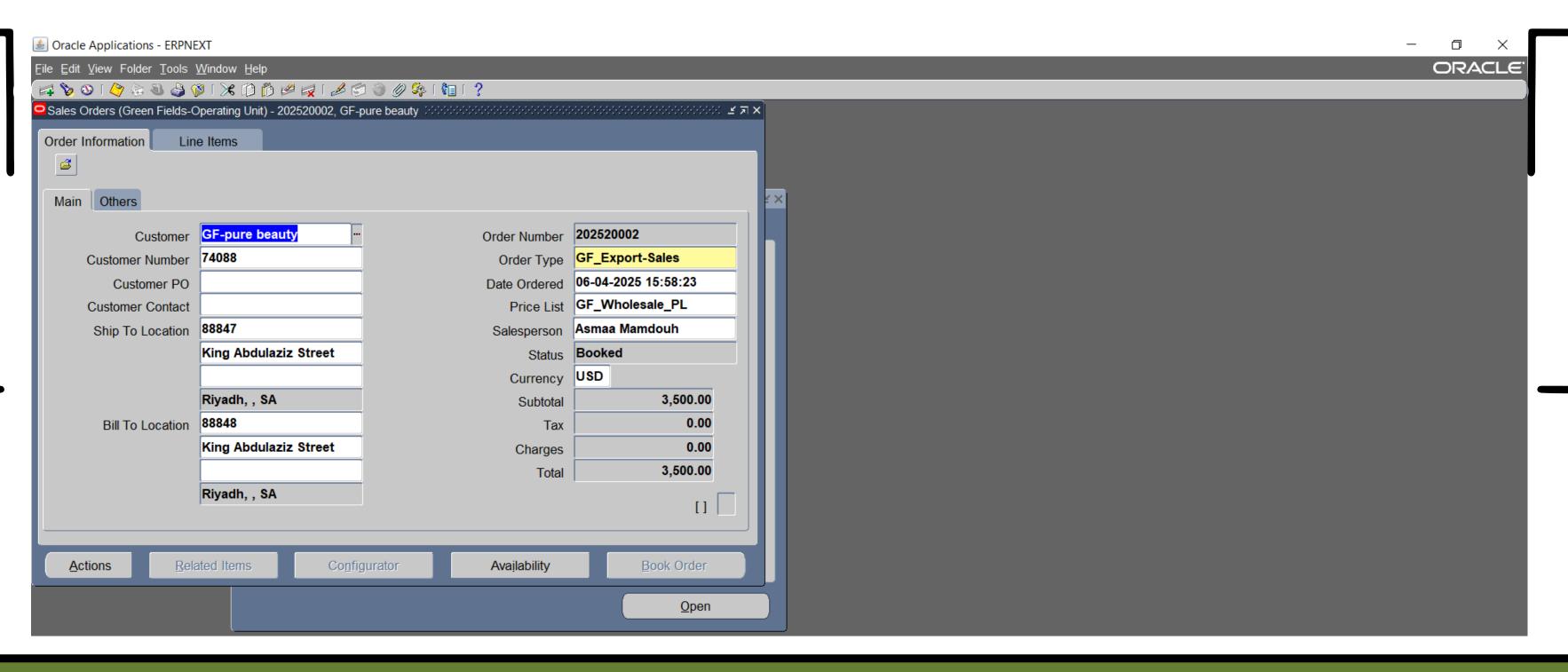
Registering Customers with relevant details:



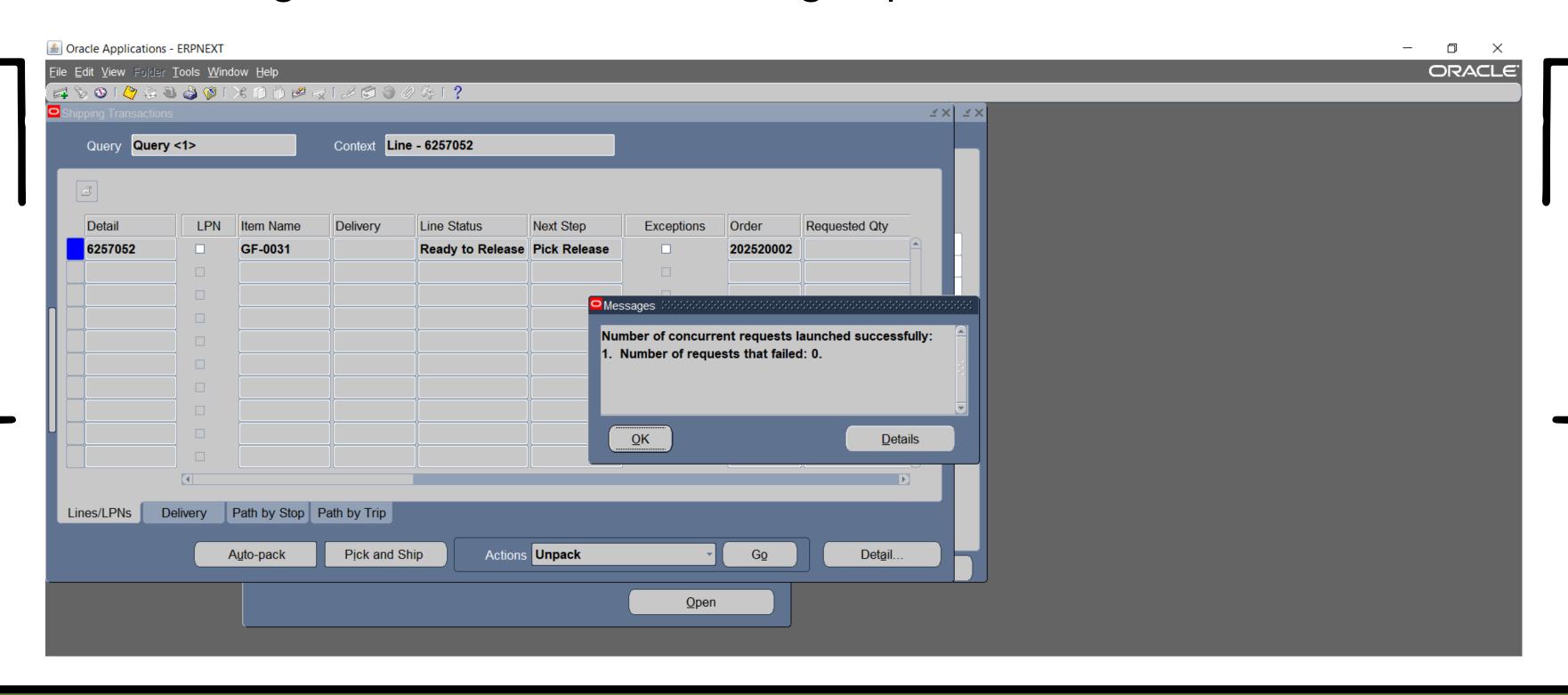
Linking Customers to specific configurations, like Order Types, Price Lists, and Salesperson:



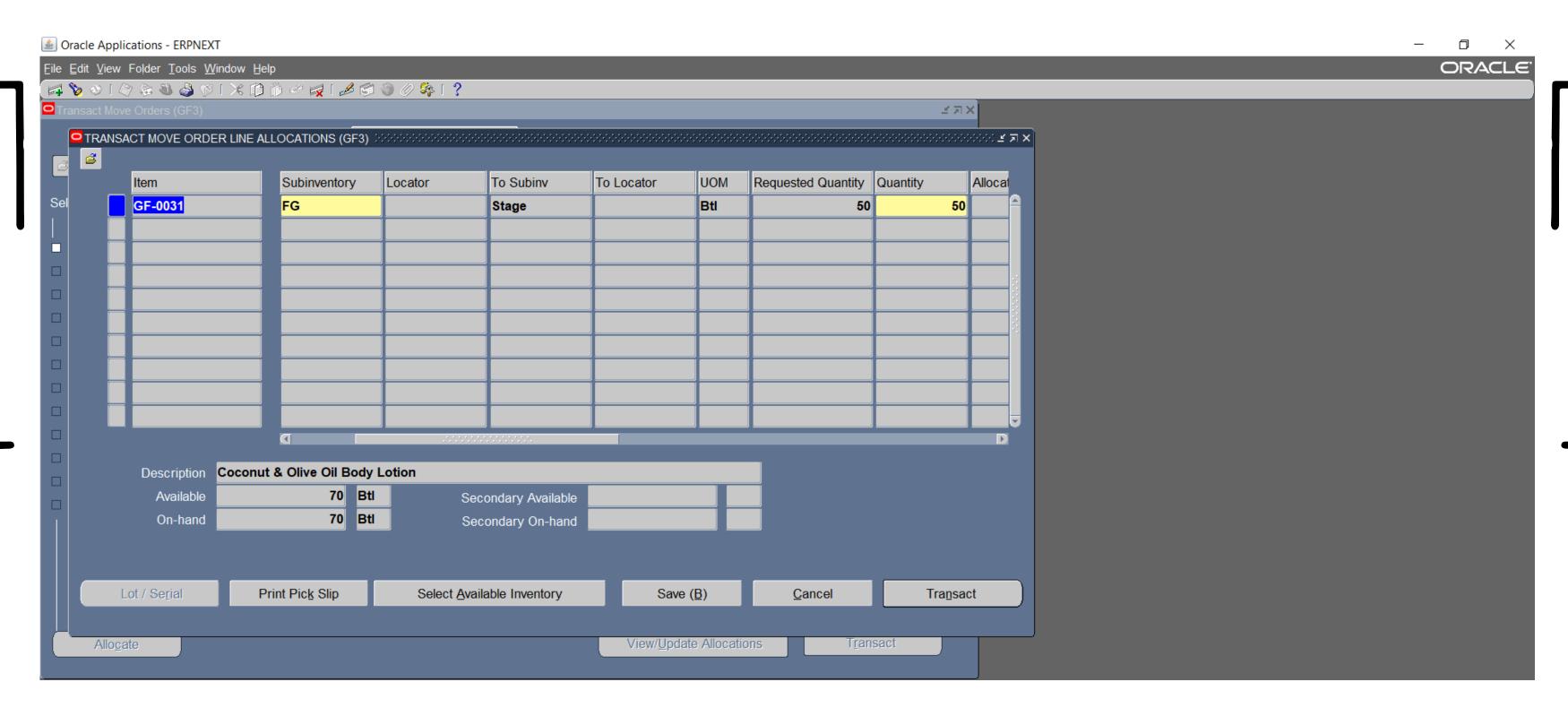
Creating Sales Order with selected customer, order type, price list, and sales details:



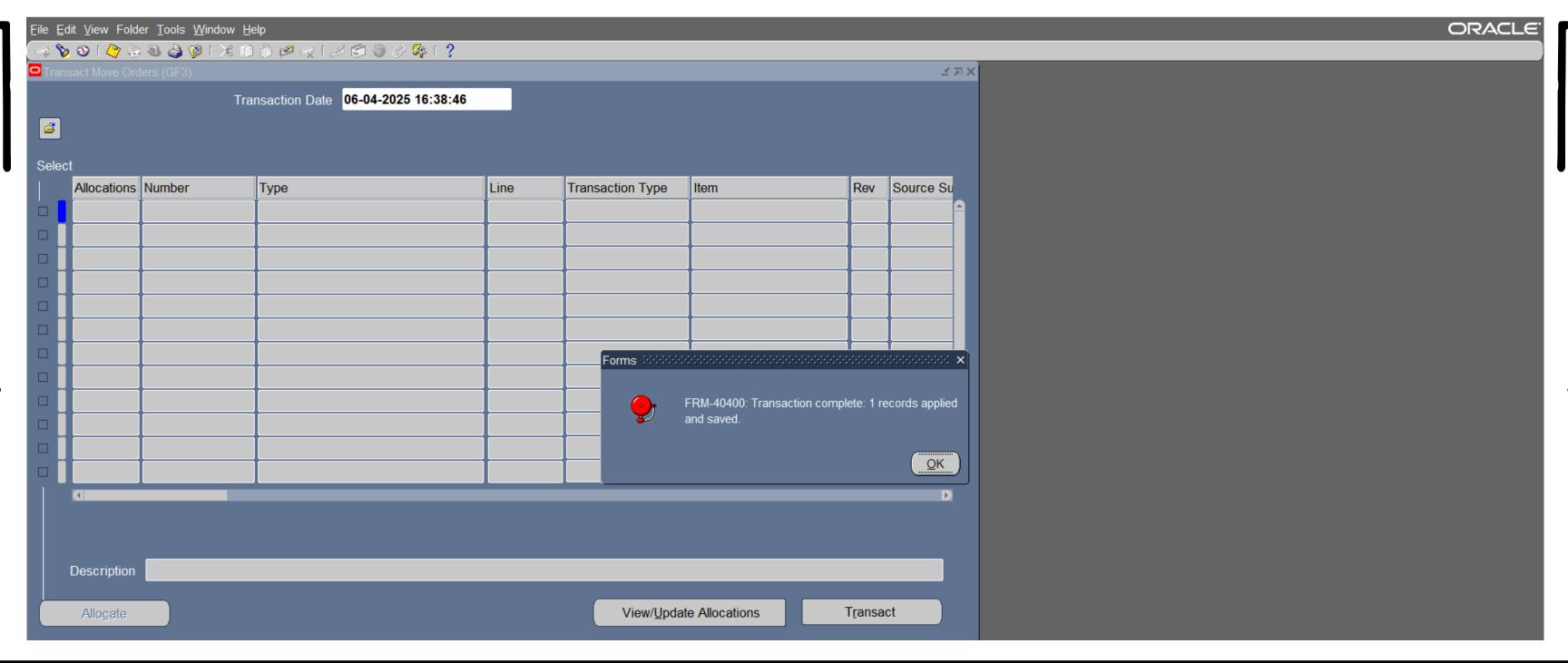
Performing Pick Release after obtaining shipment creation authorization:



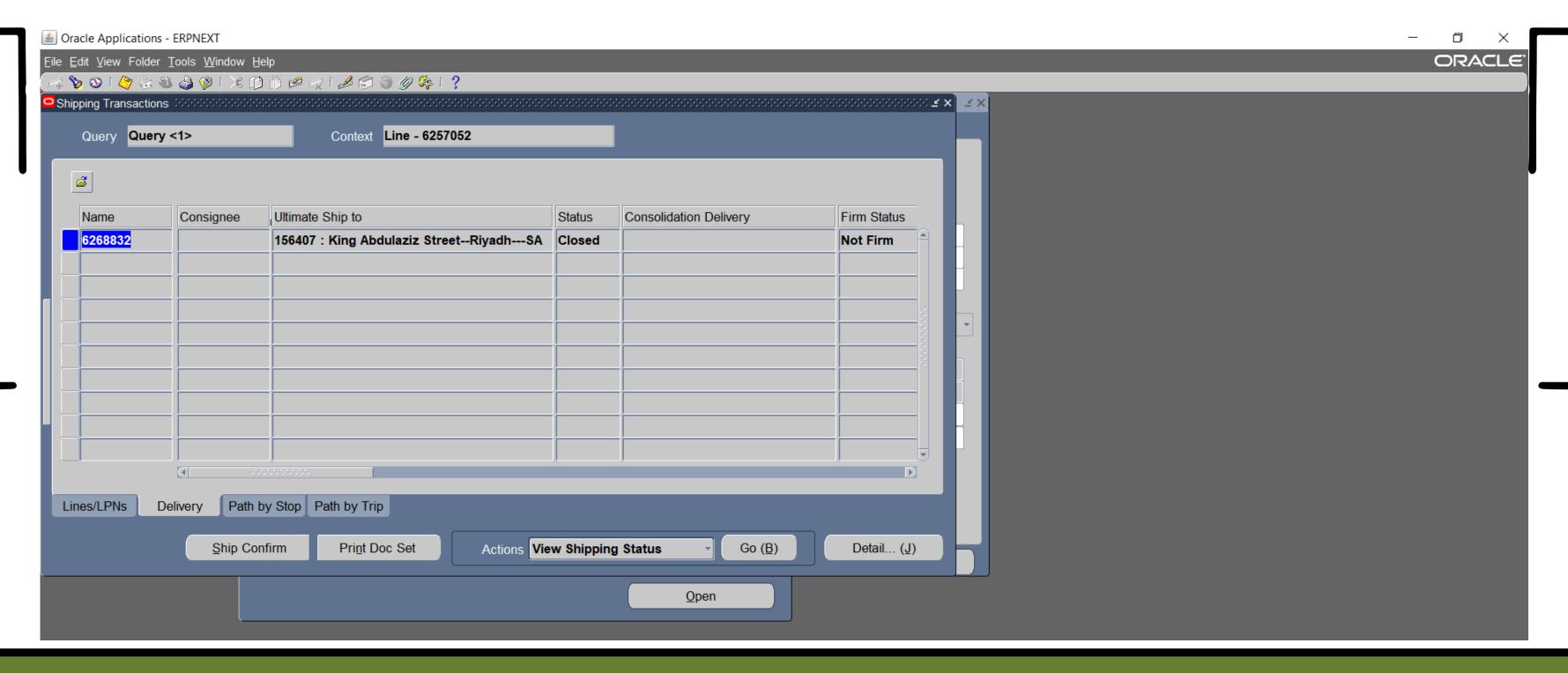
Allocating Items from Inventory for the sales order before shipping:



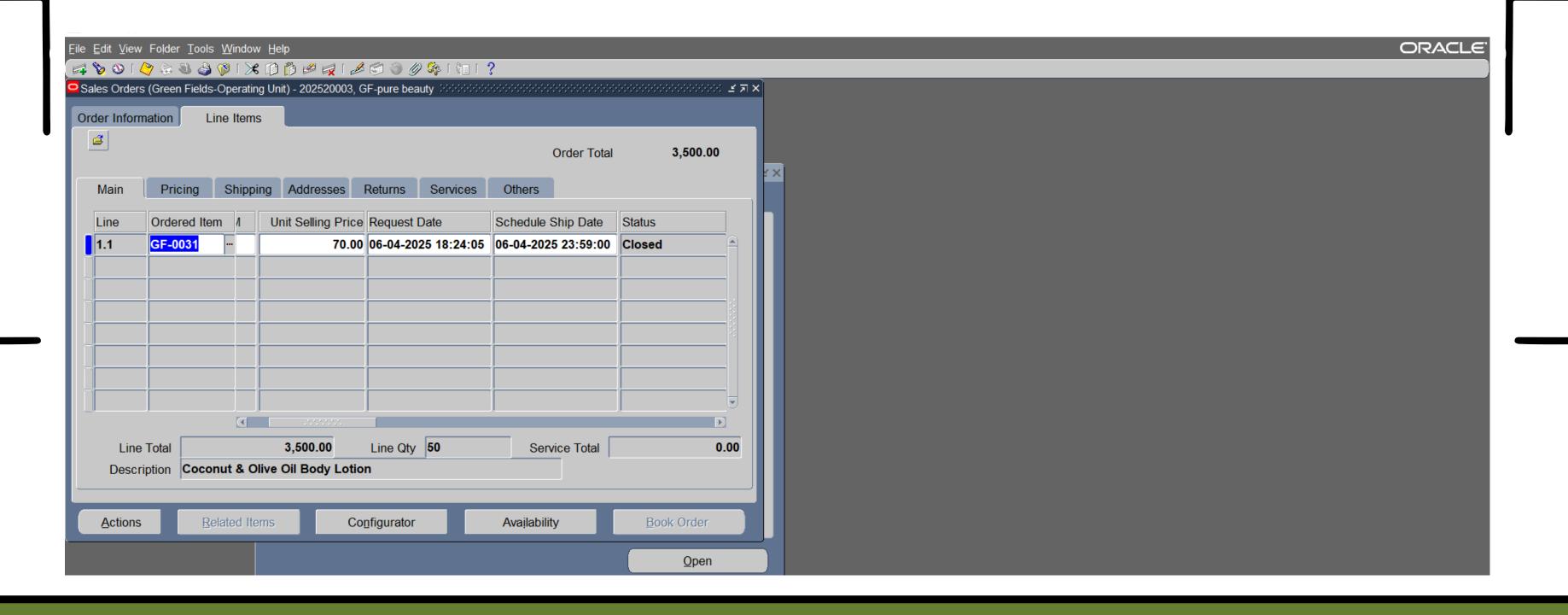
Performing Transact Move Order to confirm the physical movement of goods from inventory:



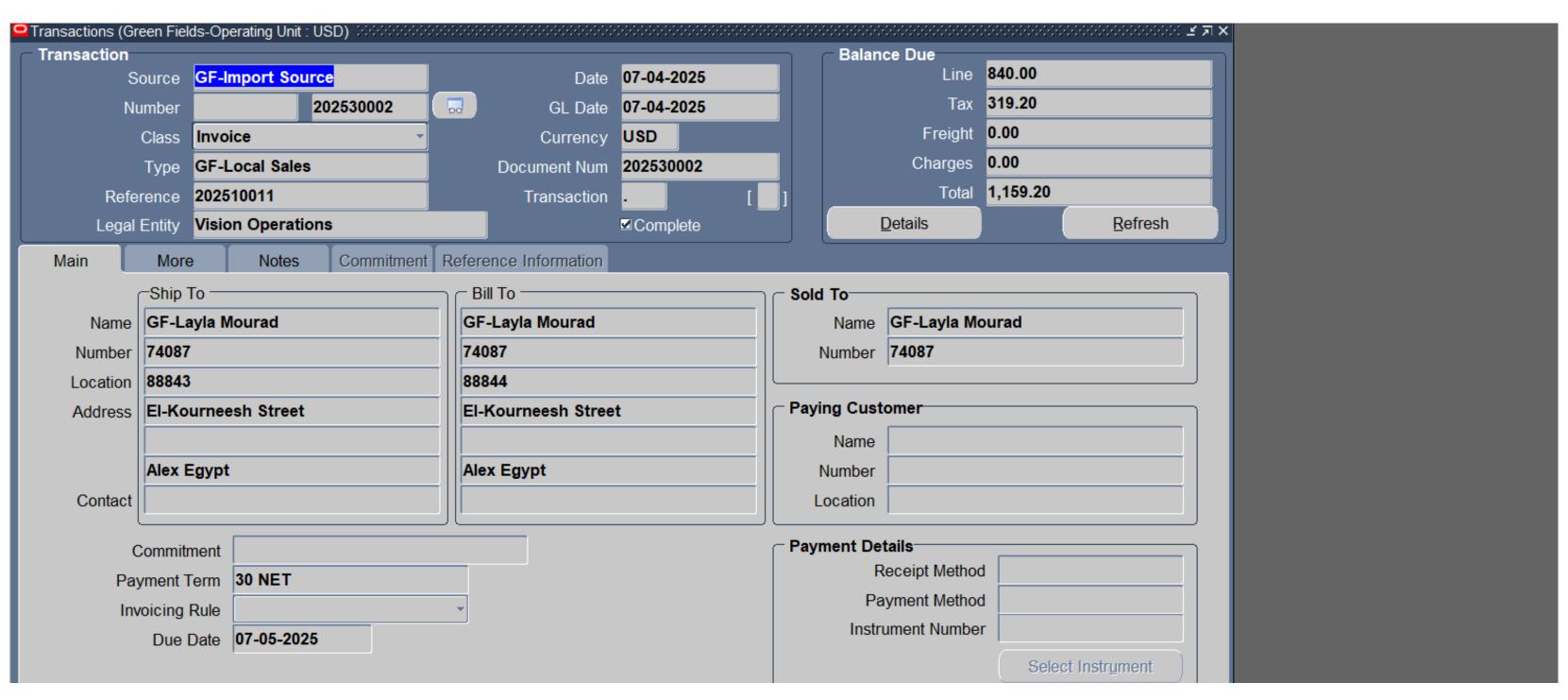
Performing Ship Confirm to finalize the shipment and update the order status:



Reviewing Sales Order Status to verify shipment completion and order closure:



Final invoice generated automatically after successful completion of the Order Management cycle:



Conclusion

This project successfully configured and implemented the Order Management and Receivables modules, ensuring a seamless order-to-cash process. The steps included defining order types, setting up customer-specific parameters, configuring pricing rules, and managing inventory allocation. The integration between different modules like Inventory, Sales Order, and Receivables ensures a smooth workflow and accurate tracking of transactions.