Assignment 4: Order Management

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**1. Order Management Setup**

* **Define Order Management System Parameters**

Path

Login to Oracle EBS

> Switch to Order Management Super User, Vision Operations (USA) Responsibility 

Customers -> Standard

A screenshot of a computer screen

Description automatically generated

This setup interface allows you to set parameters on the operating unit level for the Order Management module. These parameters work similarly to profile options, in that they allow you to control certain functionality of the Order Management module. Setting system Parameters is the 5th step in the setup procedure for the Order Management module.

**2. Customer Management [Customer Creation]**

* **Define and Maintain Customer Accounts and Contacts**
* **Setup Customer Shipping and Billing Information**
* **Manage Customer-Specific Pricing and Discounts**

Path

Login to Oracle EBS

> Switch to Order Management Super User, Vision Operations (USA) Responsibility 

Customers -> Standard

A screenshot of a computer

Description automatically generated

This will Launch an HTML page with the customer setup app.

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Description automatically generated

Create Customer

* Click the “Create” button directly under the search interface
  + A screenshot of a computer

    Description automatically generated
* Enter the customer information
  + A screenshot of a computer

    Description automatically generated
* Select “Bill to” and “Ship to” as business purposes to add the address as the bill to and ship to sites
  + A screenshot of a computer

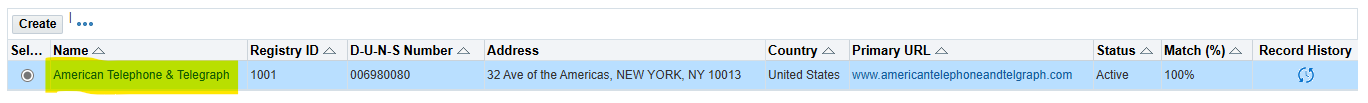
    Description automatically generated
* Click “Apply”
  + A screen shot of a computer

    Description automatically generated
* The customer will be created
  + A screenshot of a computer

    Description automatically generated

Setup and Manage Customer Shipping and Billing Information

* Search for the customer using their defining information
  + A screenshot of a computer

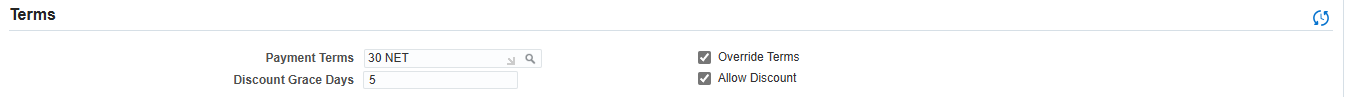
    Description automatically generated
* Click the customer name under the “Name” column
  + 
* Access the site you are interested in under the “Sites” section by clicking the Details button 
  + A screenshot of a computer

    Description automatically generated
* From here you can edit the address details under the “Site Details” tab
  + A screenshot of a computer

    Description automatically generated
* You can manage Ship to, Bill to, and other flags under the “Business Processes” tab
  + A screenshot of a computer

    Description automatically generated
* You can manage payment details and invoice related information under the “Payment Details” tab
  + A screenshot of a computer

    Description automatically generated
* You can access the customer’s credit information under the “Profile” tab
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    Description automatically generated
  + You can access the Customer Specific pricing model and discount information under the "Terms” section
    - 
* You can access the specific credit limits under the "Profile Amounts” tab
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**3. Sales Order Creation and Entry**

* **Create Sales Orders Manually or Import from External Systems**

Path

Login to Oracle EBS

> Switch to Order Management Super User, Vision Operations (USA) Responsibility 

Orders, Returns -> Sales Order

* Enter the sales order customer/header information
  + A screenshot of a computer

    Description automatically generated
* Enter the sales order line items
  + A screenshot of a computer

    Description automatically generated
* Click “Book Order” 

The sales order should now be created