Topic 1: Procurement Setups

Setup 1: Enable procurement offerings

N -> Setup and Maintenance -> Procurement -> Actions -> Go to Offerings -> Opt in Features

Check or uncheck the Enable checkbox as per requirement and finally click on Done [B].

Setup 2: Assign Business Unit Business Function

N -> Setup and Maintenance -> Procurement -> Organization Structures -> Assign Business Unit Business Function

Assign Business Functions: US1 Business Unit

Save | Save and Close | ▼ | Cancel

◢ Business Unit Functions

Select all business functions that this business unit will perform.

View ▾ | Format ▾ | ⊞ Freeze | ⤶ Wrap

Name	Enabled
Payables Invoicing	☑
Payables Payment	☑
Billing and Revenue Management	☑
Customer Payments	☑
Service Request Management	☑
Collections Management	☑
Materials Management	☑
Customer Contract Management	☑
Project Accounting	☑

Procurement	☑
Requisitioning	☑
Receiving	☑
Expense Management	☑
Procurement Contract Management	☑
Incentive Compensation	☑
Revenue Compliance and Accounting	☑
Sales	☐

◢ Financial Reporting

Select the primary ledger and default legal entity for the business function you chose so that financial transactions can be generated.

* Primary Ledger [US Primary Ledger ▾]

Below legal entity ☑ Below legal entity

* Legal Entity [US1 Legal Entity ▾]

Activate Windows
Go to Settings to activate Windows.

Click on Save and Close [B]

Setup 3: Configure Requisitioning Business Function

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Configure Requisitioning Business Function

Configure Requisitioning Business Function (US1 Business Unit)   Save   Save and Close ▼   Cancel

▲ Requisitioning

* Default Deliver-to Organization [Seattle ▼]   ☐ Reapproval required for changes made during an active approval process

Line Type [Goods ▼]   ☑ Create orders immediately after requisition import

Group Requisition Import By [Item ▼]   ☑ Approval required for buyer modified lines

☑ Allow one-time addresses   ☑ Enable approver override

                                                           ☑ Enable supply availability details for internal transfers

▲ Context Values for Requisition Descriptive Flexfields

Header Level [▼]   Distribution Level [▼]

Line Level [▼]

▲ Purchasing

* Default Procurement BU [US1 Business Unit ▼]   Cancel Unfulfilled Demand [Optionally ▼]

Price Change Tolerance Percentage [   ]   Multiple Legal Entities on Order [Error ▼]

Price Change Tolerance Amount (USD) [   ]   ☑ Allow requisition-to-agreement UOM conversion

Ship-to Location [Seattle   🔍]

Click on Save and Close [B]

Setup 4: Configure Procurement Business Function

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Configure Procurement Business Function

Select Procurement BU: TM India BU/US1 Business Unit

Click on OK [B]

Configure Procurement Business Function (US1 Business Unit)   Save   Save and Close   Cancel

Main   Document Types

▲ General

Payment Terms [Net 30 ▼]   * Inventory Organization [Operations ▼]

Shipping Method [UPS ▼]   Line Type [Goods ▼]

Freight Terms [Buyer pays freight ▼]   * Currency [USD ▼]

FOB [Origin ▼]   Conversion Rate Type [Corporate ▼]

☐ Buyer managed transportation   Preferred Language [American English US ▼]

Price Break Type [Cumulative ▼]   Prospective Supplier Registration URL https://ucf5-zeop-fa-ext.oracledemos....

Buyer [Roth, Calvin ▼]   Spend Authorized Supplier Registration URL https://ucf5-zeop-fa-ext.oracledemos....

Purchasing

Define Terms and Conditions

* Maximum File Size Megabytes	10
Receipt Close Tolerance Percent	0
Receipt Close Point	Received
Invoice Close Tolerance Percent	0
Match Approval Level	3 Way

☐ Allow manual price update on fulfilled orders

☑ Group requisitions

☐ Use customer sales order

☑ Group requisition lines

☐ Use requested date

☐ Use ship-to organization and location

☑ Default promised date from requested date

☑ Allow item description update

☑ Enforce supplier hold

☑ Autogenerate orders from requester-negotiated requisition lines

☐ Bypass approvals for automatically submitted orders

Consignment Terms

Aging Onset Point	Receipt
Aging Period Days	1
Consumption Advice Frequency	Daily

Consumption Advice Summary
- ● All organizations
- ○ Organization
- ○ Organization and item
- ○ Organization, item and transaction date

Sourcing

Configure Abstract Listing   Define Terms and Conditions

Negotiation Type	RFQ
Negotiation Style	Standard Negotiation
Rank Indicator	1,2,3...
Maximum Requirement Score	5
Purchasing Documents	Create in Oracle Fusion Purchasing

☑ Enable weights in requirements

☐ Display requirement scoring criteria to suppliers

☐ Display rank in blind negotiations

☐ Display best price in blind negotiations

☑ Enforce supplier's previous round price as start price

☑ Enable negotiation approval

☑ Enable award approval

Configure Procurement Business Function (US1 Business Unit)   Save   Save and Close   Cancel

Main   **Document Types**

View ▾   Format ▾   ▦ Freeze   ▣ Detach   ⊣ Wrap

Type ▲▼	* Display Name
Auction	Auction
Blanket Purchase Agreement	Blanket Purchase Agreement
Contract Purchase Agreement	Contract Purchase Agreement
Purchase Order	Purchase Order
RFI	RFI
RFQ	RFQ

Purchase Order: Document Type Details

* Document Layout	Purchase Order Layout	* Change Order Template	Change Order Template
* Contract Terms Layout	ContractTermsProcure		

Additional Information

Context Prompt

Click on Save and Close [B]

Setup 5: Define Common Options for Payables and Procurement

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Common Options for Payables and Procurement

Select Procurement BU: TM India BU/US1 Business Unit

Click on OK [B]

Currency Conversion

☐ Require conversion rate entry	* Realized Gain Distribution 101.10.78610.120.000.000
Conversion Rate Type Corporate ▾	* Realized Loss Distribution 101.10.78610.120.000.000

Expense Accruals

Accrue Expense Items Period end ▾

Self-Billed Invoices

☐ Gapless invoice numbering	Buying Company Identifier

Legal Entity Information

VAT Registration Member State ▾	Bill-to Location Headquarters ▾
VAT Registration Number	

Additional Information

Regional Information ▾

Activate Windows
Go to Settings to activate Windows.

C

Manage Common Options for Payables and Procurement   Save   Save and Close   Cancel

* Business Unit US1 Business Unit ▾

Default Distributions

* Liability 101.10.22100.000.000.000		* Discount Taken 101.10.77600.120.000.000	
* Prepayment 101.10.13500.000.000.000		Miscellaneous 101.10.60540.120.000.000	
Bill Payable 101.10.22100.000.000.000		Freight 101.10.62510.120.000.000	
* Conversion Rate Variance Gain 101.10.78630.120.000.000		Prepayment Tax Difference 101.10.13500.000.000.000	
* Conversion Rate Variance Loss 101.10.78630.120.000.000			

Automatic Offsets

Offset Segments ● None
○ Primary balancing segment
○ All segments, except natural account

One Time Payments

Liability 101.10.22100.000.000.000		Expense 101.10.78990.121.000.000	

Click on Save and Close [B]

Setup 6: Define Receiving Parameters

N -> Setup and Maintenance -> Procurement -> Receiving -> Manage Receiving Parameters

Select Organization: TMBLR/001

Click on OK [B]

Manage Receiving Parameters

Inventory Organization 001 [Change Organization] [Save] [Save and Close] [Cancel]

General

Ship-to Exception Action	Warning	☐ Allow unordered receipts
ASN Control Action	Warning	☐ Enforce blind receiving
Early Receipt Tolerance in Days	60	☐ Print receipt traveler
Late Receipt Tolerance in Days	60	☐ Include closed purchase orders for receipts
* Receipt Days Exceed Action	None	☐ Allow routing override
Over-Receipt Tolerance	50	☐ Process all lines together
* Over-Receipt Action	None	☐ Print shipping documents for returns to suppliers
* Receipt Routing	Standard receipt	☐ Print shipping documents for drop ship orders
	☐ Use quality inspection plan	☐ Print shipping documents for return material authorizations
	☐ Allow substitute receipts	☐ Publish transactional business events

▲ Receipt Number

* Generation	Automatic
Type	Numeric
Next Number	51201

▲ RMA

* Receipt Routing	Standard receipt
RMA Validate Lots	Unrestricted
	☐ Validate serial numbers

Click on Save and Close [B]

Note: Similarly define this setup in the relevant organizations.

Setup 7: Define Payment Terms

- It is global level and it is common setup for purchasing and payables.
- It describes when we payment to the supplier.
- Seeded payment terms are applicable in cloud application. If required, it can be create new values.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Payment Terms

Click on + sign

Create Payment Terms

[Save] [Save and Close] [Cancel]

* Name	TM Immediate	* From Date	11/5/18	
Description	TM Immediate	To Date	m/d/yy	
		AB Context		
Cutoff Day				
Rank				

▲ Installments

View ▼ ✚ ✕ ⊞ ⊟ ▣ Detach

	Due (%)	Amount Due	Calendar	Fixed Date	Days	Day of Month	Months Ahead
▶	100			m/d/yy	0		

Discount

First Discount				Second Discount				Third Discount			
Discount (%)	Days	Day of Month	Months Ahead	Discount (%)	Days	Day of Month	Months Ahead	Discount (%)	Days	Day of Month	Months Ahead

Set Assignments

View ▼ ＋ ✕ 🔳 Detach

Set Code	Set Name	Description
COMMON	Common Set	

Click on Save and Close [B]

Similarly

Create Payment Terms

Save | Save and Close | Cancel

* Name TM N15
Description Net Payment within 15 Days
Cutoff Day
Rank

* From Date 11/5/18
To Date m/d/yy
AB Context

Installments

View ▼ ＋ ✕ 🔳 Detach

	Due (%)	Amount Due	Calendar	Fixed Date	Days	Day of Month	Months Ahead
▶	100			m/d/yy	15		

Discount

First Discount				Second Discount				Third Discount			
Discount (%)	Days	Day of Month	Months Ahead	Discount (%)	Days	Day of Month	Months Ahead	Discount (%)	Days	Day of Month	Months Ahead

Set Assignments

View ▼ ＋ ✕ 🔳 Detach

Set Code	Set Name	Description
COMMON	Common Set	

Click on Save and Close [B]

Similarly

Create Payment Terms

Save | Save and Close | Cancel

* Name TM N30
Description Net Payment within 30 Days
Cutoff Day
Rank

* From Date 11/5/18
To Date m/d/yy
AB Context

Installments

View ▼ ＋ ✕ 🔳 Detach

	Due (%)	Amount Due	Calendar	Fixed Date	Days	Day of Month	Months Ahead
▶	100			m/d/yy	30		

Discount

First Discount					Second Discount					Third Discount				
Discount (%)	Days	Day of Month	Months Ahead		Discount (%)	Days	Day of Month	Months Ahead		Discount (%)	Days	Day of Month	Months Ahead	
4	7				3	14				2	21			

▲ Set Assignments

View ▼ ＋ ✕ 🔲 🔲 Detach

Set Code	Set Name	Description
COMMON ▼	Common Set	

Click on Save and Close [B]

Setup 8: Define Carrier

- It is global level and it is common setup for inventory, purchasing and order management etc.
- It describes who transport of the items.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Carriers

Click on + sign

Create Carrier   Save | Save and Close | Cancel

* Carrier Name TM Blue Dart

☑ Active

☐ Manifesting enabled

▶ Additional Information

Shipping Methods   Contacts   Inbound Tracking Rules

Actions ▼ View ▼ Format ▼ ＋ ✕   🔲 Freeze   🔲 Wrap

* Service Level	* Mode of Transport	Active
Door to door ▼	Truckload ▼	☑

Columns Hidden   1

Door to door Truckload: Organization Associations

Actions ▼ View ▼ Format ▼   Select and   🔲 Freeze   🔲 Wrap

Organization	Organization Name
002	Atlanta
001	Seattle

In Contacts Tab

Create Carrier   Save | Save and Close | Cancel

* Carrier Name TM Blue Dart

☑ Active

☐ Manifesting enabled

▶ Additional Information

Shipping Methods   **Contacts**   Inbound Tracking Rules

Actions ▼ View ▼ Format ▼ ＋ ✏ ✕   🔲 Freeze   🔲 Wrap

Last Name	First Name	Job Title	Phone	E-Mail
Charan				charan@bluedart.com

In Inbound Tracking Rules Tab

Leave the values as default

Click on Save and Close [B]

Setup 9: Define FOB Lookups
- It is application level. Seeded values are applicable in cloud application. If required, it can be create new values.
- It is used to define FOB Codes.
- FOB Code describes who is responsible of the items under transportation.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage FOB Lookups

Click on + sign

Finally Click on Save and Close [B]

Setup 10: Define freight terms Lookups
- It is application level. Seeded values are applicable in cloud application. If required, it can be create new values.
- It describes who payment of the transport amount to the carrier.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage freight terms Lookups

Click on Save and Close [B]

Setup 11: Define Purchasing Profile Options

- Seeded profile options are applicable in cloud application.
- Setting up the profile values based on requirement.
- 16 seeded purchasing profile options are applicable.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Purchasing Profile Options

Setup 12: Create Procurement Document Numbering

- It is used to set purchasing transaction numbers.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Procurement Document Numbering

Setup 13: Create Purchasing Line Types

- Seeded line types are applicable. If required, it can be create new values.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Purchasing Line Types

Click on Save and Close [B]

Setup 14: Create Document Styles

- Seeded document styles are applicable. If required, it can be create new values.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Document Styles

Below is the screenshot to checkout seeded values

Click + Sign for create a new value

Click on Save and Close [B]

Setup 15: Create Purchasing Categories

- Already it is completed this setup. Please refer to product management module.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Purchasing Categories

Setup 16: Define Receiving Profile Options

- Seeded profile options are applicable in cloud application.
- Setting up the profile values based on requirement.
- 8 seeded receiving profile options are applicable.

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Receiving Profile Options

Profile Option Code	Profile Display Name	Application	Module	Start Date	End Date	Description
RCV_AGING_PERIOD	Aging Period for Extend...	Receiving	Common	1/1/80		Specify the number of days before an invoice is created out of a r...
RCV_ALLOW_RATE_OVERRIDE_FOR_USER_RATE...	Rate Override for User ...	Receiving	Common	1/1/80		Enable rate override of user rate type.
RCV_ERS_PREFIX	Prefix for Extended Rec...	Receiving	Common	1/1/80		Specify prefixes for extended receipt settlement generated invoices.
RCV_SSP_ALLOW_INV_DEST_RECEIPTS	Inventory Replenishme...	Receiving	Common	1/1/80		Specify whether self-service users can receive inventory destinati...
RCV_SSP_INCLUDE_TO_FOR_CONFIRM_RECEIPT	Transfer Orders Include...	Receiving	Common	11/17/15		Enable notification through self-service receiving for transfer orde...
RCV_SSP_NOTIF_INCLUDE_PAST_DUE_ORDERS	Past Due Orders Includ...	Receiving	Common	11/17/15		Enable notification through self-service receiving if need-by date ...
RCV_SSP_REQUIRE_BLIND_RECEIVING	Blind Receiving for Self-...	Receiving	Common	1/1/80		Enable blind receiving for the self-service procurement application.
RCV_TP_MODE	Receiving Transaction ...	Receiving	Common	1/1/80		Specify transaction processing mode, such as online or backgro...

Setup 17: Define Job Families

N -> Setup and Maintenance -> Procurement -> Workforce Structures -> Manage Job Families

Click on + Sign

Click on Submit [B]

Similarly click on + sign

Click on Submit [B]

Setup 18: Define Jobs

Jobs: Clerk, Executive, Manager, GM, CMD

N -> Setup and Maintenance -> Procurement -> Workforce Structures -> Manage Job

Click on + Sign

Click on Next [B]

Click on Next [B] on step 2

Click on Next [B] on step 3

Click on Next [B] on step 4

Click on Save and Submit [B]

Similarly create the jobs as per below

Job Name	Job Code	Job Set	Level
TM Executive	20	Common Set	1
TM Manager	30	Common Set	2
TM GM	40	Common Set	3

TM CMD	50	Common Set	4

Setup 19: Define/Create Positions

Positions

Purchasing Clerk, Production Clerk

Purchasing Executive, Production Executive

Purchasing Manager, Production Manager

Purchasing GM, Production GM

CMD

N -> Setup and Maintenance -> Procurement -> Workforce Development -> Workforce Structures -> Manage Positions

Click on + Sign

Click on Next [B] at Step 1

Click on Next [B] at Step 2

Create Position: Evaluation Criteria

Effective Start Date 1/1/51
Business Unit US1 Business Unit
Name TM Purchasing Clerk

Code Generated automatically
Parent Position

▸ Evaluation Criteria

Click on Next [B] at Step 3

Create Position: Profiles

Effective Start Date 1/1/51
Business Unit US1 Business Unit
Name TM Purchasing Clerk

Code Generated automatically
Parent Position

▸ Profiles

Click on Next [B] at Step 4

Create Position: Review

Effective Start Date 1/1/51
Parent Position
Business Unit US1 Business Unit
Action Reason

Name TM Purchasing Clerk
Code Generated automatically
Parent Position

◢ Position Description

Status Active
Department Procurement US
Job TM Clerk
Location Chicago
Manager
Assignment Category

Full Time or Part Time Full time
Regular or Temporary Regular
At Risk
Context Value
Attachments None

Click on Save [B] and Submit [B]

Similarly create the positions as per below

Position Name	Position Code	Job	Hiring Status	Type
TM Purchasing Executive	Generated Automatically	TM Clerk	Approved	None
TM Purchasing Manager	Generated Automatically	TM Executive	Approved	None
TM Purchasing GM	Generated Automatically	TM GM	Approved	None
TM CMD	Generated Automatically	TM CMD	Approved	Single Incumbent

Setup 20: Define Position Hierarchy

Position Hierarchy

CMD

Purchasing GM

Purchasing Manager

Purchasing Executive

Purchasing Clerk

N -> Setup and Maintenance -> Procurement -> Workforce Development -> Workforce Structures -> Manage HCM Position Hierarchy

Click on + Sign

Setup 21: Create Person

Employee Name	User Name	Job	Position	Business Unit
TM Sunil	TMSUNIL	TM Clerk	TM Purchasing Clerk	TM India BU
TM Sapthagiri	TMSAPTHAGIRI	TM Clerk	TM Purchasing Clerk	TM India BU
TM Venkatesh	TMVENKATESH	TM Executive	TM Purchasing Executive	TM India BU
TM Arjun	TMARJUN	TM Executive	TM Purchasing Executive	TM India BU
TM Nagarjuna	TMNAGARJUNA	TM Manager	TM Purchasing Manager	TM India BU
TM Mahesh	TMMAHESH	TM Manager	TM Purchasing Manager	TM India BU
TM Balakrishna	TMBALAKRISHNA	TM GM	TM Purchasing GM	TM India BU
TM Pawan	TMPAWAN	TM GM	TM Purchasing GM	TM India BU
TM Chiranjeevi	TMCHIRANJEEVI	TM CMD	TM CMD	TM India BU

N -> Setup and Maintenance -> Procurement -> Users and Security -> Manage Users

Click on + Sign

Click on Save and Close [B]

Note: Similarly create users as per above table.

Setup 22: Create Procurement Agents

Procurement BU	Name	Requisitioning BU	Status
TM India BU	TM Sunil	TM India BU	Active
TM India BU	TM Sapthagiri	TM India BU	Active
TM India BU	TM Venkatesh	TM India BU	Active
TM India BU	TM Arjun	TM India BU	Active
TM India BU	TM Nagarjuna	TM India BU	Active
TM India BU	TM Mahesh	TM India BU	Active
TM India BU	TM Balakrishna	TM India BU	Active
TM India BU	TM Pawan	TM India BU	Active
TM India BU	TM Chiranjeevi	TM India BU	Active

N -> Setup and Maintenance -> Procurement -> Procurement Foundation -> Manage Procurement Agents

Click on + Sign

Create Procurement Agent

Save | Save and Close | ▼ | Cancel

* Procurement BU US1 Business Unit
* Agent TM Sunil
Default Requisitioning BU US1 Business Unit
Default Printer
Status Active

Agent Access

View

Action	Allowed	Access to Other Agents' Documents
Manage Requisitions	☑	Full
Manage Purchase Orders	☑	Full
Manage Purchase Agreements	☑	Modify
Manage Negotiations	☐	None
Manage Sourcing Programs	☐	None
Manage Catalog Content	☑	Not Applicable
Manage Suppliers	☑	Not Applicable
Manage Supplier Qualifications	☑	None
Manage Approved Supplier List Entries	☑	Not Applicable
Analyze Spend	☑	Not Applicable

Click on Save and Close [B]

Note: Similarly create procurement agents as per above table.

Setup 23: Create Requisition Approvals

Position Hierarchy

CMD (Limit upto Unlimited)

Purchasing GM (Limit upto 10L)

Purchasing Manager (Limit upto 1L)

Purchasing Executive (Limit upto 50K)

Purchasing Clerk (Limit upto 10K)

N -> Setup and Maintenance -> Procurement -> Approval Management -> Manage Requisition Approvals
Put cursor on specific rule as per requirement

Click on Edit Rules [B]

Click on + Sign on Rules Section

Create Rule

* Rule	TM Position Hierarchy
* Priority	Medium
Description	

☐ Rule always applies

OK Cancel

Click on OK [B]

Rules

Actions ▼ View ▼ Format ▼ ➕ ▤ ✏ ✖ ⊟ ▦ Freeze ▦ Detach ◦┤ Wrap **Disable**

Rule	Priority	Conditions	Enabled
TM Position Hie...	Medium		✔
Healthcare BU ...	Medium	Requester Equals Yao, Chun AND Overriding Approver Is blank AND Requisition Amount Between 50 and 5000	
Healthcare BU ...	Medium	Overriding Approver Is blank AND Requisition Amount Greater than or equal to 5000 AND Requester Equals Yao, Chun	
Healthcare BU ...	Medium	Overriding Approver Is blank AND Requisition Amount Less than or equal to 5000 AND Requester Equals Fredricks, Camille	
Healthcare BU ...	Medium	Overriding Approver Is blank AND Requisition Amount Between 5000 and 50000 AND Requester Equals Fredricks, Camille	

Columns Hidden   1

TM Position Hierarchy: Details

Conditions

Actions ▼ View ▼ Format ▼ ✏ ✖ ▦ Freeze ▦ Detach ▦ ▦ ▦ ◦┤ Wrap **Add Condition** ✂ ▤ ▥

Condition
No data to display.

Click on Add Condition [B] in Conditions Section

Add Condition

Type	Approval task attribute
* Attribute	Requisition Amount 🔍
Operator	Greater than or equal to
Value Type	Value
* Value	10,000

Add Another OK Cancel

Click on OK [B]

Click on Add Action [B] in Actions Section

Edit Action 1

Action Type	Approval required ▾
Route Using	Position hierarchy ▾
Position Hierarchy	Posiiton Hierarchy ▾
Position Chain Of	Preparer's Position ▾
Start With	Next Position ▾
* Minimum Job Level	0
* Top Position in Hierarchy	Chief Executive Officer 🔍
Include	All approvers ▾

Add Another   OK   Cancel

Click on OK [B]
Click on Deploy [B] and Enable [B]
Setup 24: Create Purchasing Document Approvals

Position Hierarchy

CMD (Limit upto Unlimited)
Purchasing GM (Limit upto 10L)
Purchasing Manager (Limit upto 1L)
Purchasing Executive (Limit upto 50K)
Purchasing Clerk (Limit upto 10K)

N -> Setup and Maintenance -> Procurement -> Approval Management -> Manage Purchasing Document Approvals
Put cursor on specific rule as per requirement

Deploy   Discard   **Manage User-Defined Attributes**   **Edit Rules in BPM**   Done

Actions ▼   View ▼   Format ▼   ☐ Freeze   ☷ Detach   ⬚ Wrap   **Edit Rules**   **Disable**

Stage	Participant	Routing	Voting Regime	Enabled
Preapproval	Preapproval FYI	FYI		
Preapproval	Preapproval Serial	Serial		
Preapproval	Preapproval Consensus	Parallel	Consensus	
Preapproval	Preapproval First Responder Wins	Parallel	First Responder Wins	
Terms	Terms Approval FYI	FYI		
Terms	Terms Approval Serial	Serial		✔
Terms	Terms Approval Serial 2	Serial		
Terms	Terms Approval Serial 3	Serial		
Terms	Terms Approval First Responder Wins	Parallel	First Responder Wins	
Terms	Terms Approval Consensus	Parallel	Consensus	
Postapproval	Postapproval Serial	Serial		
Postapproval	Postapproval Consensus	Parallel	Consensus	
Postapproval	Postapproval First Responder Wins	Parallel	First Responder Wins	
Postapproval	Funds Override Approval	Parallel	Consensus	✔

Activate Windows
Go to Settings to activate Windows

Click on Edit Rules [B]

Note: Define this setup same as previous setup.