Fusion Order Management Work Sheet

S.No	Description	Task	Remarks
1	Log in into Vision Demo Database		
2	Use Rapid Implementation for General Ledger		Create zip file for Chart Of Accounts and zip file for Ledger , LE and BU
3	Rapid Implementation - Upload Chart of Accounts	Upload Chart Of Accounts	Signout and signin after completion of three ESS jobs.
4	Create Locations s01_loc_0 , s01_loc_1 and s01_loc_2	Manage Locations	
5	Rapid Implementation - Upload Ledger, Legal Entities, and Business Units	Upload Ledger, Legal Entities, and Business Units	Signout and signin after completion of four ESS jobs.
6	In FSM Actions - Go to Offerings - Procurement - Opt in Features - Features		Enable Customer Sales Order Fulfillment
7	In FSM Actions - Go to Offerings - Order Management - Opt in Features - Features		Enable drop ship and Order Holds
8	Provide Location for BU	Manage Business Unit	
9	HCM Info for legal Entity	Manage Legal Entity HCM Information	
10	Create a Legal user	Manage Users	Create a Legal user s01_emp. Customise springboard with needed icons after loggging in
11	Manage Business Unit Set Assignments. Query in FSM	Manage Business Unit Set Assignment	Set these Reference data set objects of Customer Account Relationship and Customer Account site with the value ENTERPRISE
12	Create Inventory orgs A010 , A011 and A012	Manage Inventory Organizations	Schedule = Operations. Make the first child org as Manufacturing Plant
13	Tie org to Locations	Manage Locations	
14	Create Sub Inventories for both the child orgs	Manage Subinventories and Locators	Create one FGS and one STAGE Sub Inventories for
15	Refer column G and add roles to user		
16	Import User and Role Application Security Data	Import User and Role Application Security Data	Run this ESS Job. Run also LDAP
17	Provide Data Access for all the above roles except Vision Roles	Manage Data Access for Users	Vision Roles need not be given data access
18	Manage Carriers	Manage Carriers	Create for both the orgs.
19	Manage Transit Times	Manage Transit Times	From 2nd to 1st child
20	Manage Inter org parameters	Manage interorganization Parameters	Make it Intransit with Transfer Orders required
21	In Manage Item Class provide Function security and Data Security	Manage Item Classes	Only if Public is not enabled
22	Create a Default Template	Manage Item Classes	For Finished Goods

23	Create Item a01_std_order		Product information Management in Product Management
24	Keep a stock of 10000 in A010	Supply Chain Execution - Inventory Management	Create Miscellaneous Transaction
25	Verify ours orgs in Planning	Supply Chain Planning - Plan Inputs	In Manage Planning Source Systems verify and enable our orgs for Collections in OPS
26	Create Customer	Create Customer	
27	Collect data for Org , Items, Customer and On Hand with Collecton Type as Targetted.	Supply Chain Planning - Plan Inputs - Collect Planning Data	Choose Org, Items and Customer under Reference Data and On Hand under Supply Planning Data
28	Create a infinite Availability based ATP rule for both our child orgs	OM - GOP - Manage ATP Rules	Add it at Org level
29	Collect data for Order Orchestration Reference Objects with Collection type as Targetted.	Supply Chain Planning - Plan Inputs - Collect Planning Data	Choose Order orchestration Reference Objects in Reference data
30	Set the below order Profiles DOO_CURRENCY_CONVERSION_TYPE, DOO_DISPLAY_CURRENCY	Manage Administrator Profile Values	Corporate and USD
31	Set Default Price periodicity UOM Class , IVO	Manage Pricing Parameters	Set the IVO as your Master Org
32	Make our user as buyer for our BU	Manage Procurement Agents	Student, scm01 with full access for our BU a01_business_unit
33	Set values for OM Parameters	Manage Order Management Parameters	
34	Add a01_high for the lookup ORA_QP_REV_POTENTIAL_VALUES	Manage Pricing Lookups	
35	Create a Pricing Segment a01_Pricing_Segment for the look up ORA_QP_CUST_PRICING_SEGMENTS	Manage Pricing Lookups	
36	Set a customer profile for our Customer	Pricing Administration - Manage Customer Pricing Profiles	
37	Create a mapping for our pricing profile to pricing segment	Pricing Admin – Manage Pricing Segments	map a01_high to a01_pricing_segment
38	Create a Pricing Strategy for our Business Unit and USD.	Pricing Administration - Manage Pricing Strategies	Approve the strategy
39	Map our a01_Pricing_Segment to a01_Pricing_Strategy	Pricing Admin - Manage Pricing Strategy Assignments	At Header sales order all - Add a line for our a01_Pricing_Segment and map it to a01_Pricing_strategy
40	Create a price List for all items and for a01_std_order and Approve	Pricing Administration - Manage Pricing list	All items price of 1 and a01_std_price of 2
41	Associate our price list to Pricing Strategy	Pricing Administration - Manage Pricing Strategies	Add a01_Price_List to a01_pricing_strategy
42	Run the ESS job Refresh and Start the Order Promising Server	Under Scheduled Process	Run for all parameters
43	Create a Sales Order and progress it to Awaiting Shipping		
44	Create Release Sequence Rule	Manage Release Sequence Rules	

45	Create Pick Slip Grouping Rule	Manage Pick Slip Grouping Rules	
46	Create Pick Wave Release Rule	Manage Pick Wave Release Rules	
47	Create Ship Confirm rule	Manage Ship Confirm Rule	
48	Create Shipping Parameters	Manage Shipping Parameters	
49	Launch Pick Release	Supply Chain execution - Shipments - Manage Shipment Lines	Query for Sales Order - Actions - Pick Release
50	Ship Confirm	Click on Shipment Number - Ship Confirm button	Yes on Warning Message
51	Observe Send Shipment Advice ESS job is running	ESS Job	Sales Order line progress to Shipped and then to Awaiting Billing
52	Enable Returnable in Item Attributes		
53	Create a Return Order for the above shipped order		Line struck as Receiving parameters are not specified
54	Set the receiving parameters and recover the order	Manage Receiving Parameters	Line progresses to Awaiting Receiving
55	Send Recipt Confirmation to Sales Order upon RMA	Send Receipt Confirmation	Line progresses to Delivered.and then to Awaiting Billing
56	Add IVO in Manage Receivables System Options	Manage Receivables System Options	
57	Open GL and Receivables Period		
58	Import AutoInvoice	Import Autoinvoice ESS Job	
59	Observe the Line Status as closed in Sales order		Both Invouce and Credit Memo Created
60	Update / Close Sales Order	Update or Close Sales Orders	Put Header in parameters. Header gets closed
61	Create Bank	Manage Banks	
62	Create Bank Branch	Manage Bank Branches	Routing = 9 Digit number
63	Manage Bank Accounts	Manage Bank Accounts	
64	Manage Receivables Activities	Manage Receivables Activities	Check the auto created Earned and unearned discounts
65	Create a Receipt Class for a Direct Receipt of Payment from Customer	Manage Receipt Classes and Methods	Name = b01 Cleared Receipt Class , No Remittence, Clearance = Direct, Remittence Bank Account
66	Create a Receipt for the invoice and Credit Memo	Receivables - Account Receivable - Create Receipt	In Add Open Receivables add the Credit Memo also by searching on the Credit Memo Transaction number.
67	Create Accounting in Accounts Receivable		
68	Create the Trial Balance	General Ledger Trial Balance Report	
	OM Activities . Every Business process below will be explained in detail during the training. Tasks will not be mentioned here.		
69	High Level Reservation for Lot Controlled Items		
70	Serial Generation at Inventory Pick		
71	Serial Generation at Sales Order Issue		

72	Inspection Before Despatch		
73	Two Variants during Shipping		
74	Back Ordering at Staging Area		
75	Defaulting Rules		
76	Processing Constraints		
77	Substitute Item		
78	Dozen UOM Test	d0151_std_order	
79	Tiered Highest Price	d0152_Tiered_Higest	
80	Tiered All Tiers Price	d0153_Tierd_All_Tiers	
81	Tiered Block Price	d0154_Tiered_Block	
82	Discount Simple	d0155_Discount	
83	Extended Warrenty	d0156_Extended_Warrenty	
84	Buy 1 Get 1 Free		
85	Holds & Releases		
86	Credit Check		
87	Extended Flex Fields in OM		
88	Kit Item (Laptop , Carry Case and Extended Warranty)		
89	Ship Set and Fullfillment Set		
90	Sales Order Approvals		
91	No Scheduling DOO Customisation		
92	No Reservation DOO Customisation with a demo		
93	Line Split in Sales Order with Manual Reservation		
94	Drop Ship Process		
95	Back to Back Buy - GOP		
96	Back to Back Transfer - GOP		
97	Back to Back Make - GOP		
98	Drop Ship Using GOP		
99	Configurator		
100	Manage Document Sequences for SO Numbering		