Practice 1: Enter People

This practice covers entering yourself as an employee in the system for use in a later practice.

Practice 1: Enter People

User = Operations
Password = Welcome
Responsibility = Human Resources
(N) People - Enter and Maintain
1. Select the New Button
2. Last name = Yours
3. First Name = Yours
4. Gender = Yours
5. Type =employee
6. Social Security - Any number in this format (xxx-xx-xxxxx)
7. Date of Birth = Yours (real or not)
8. Save
9. Record your employee number ___________

Practice 2: Create a User ID

This practice covers establishing a user ID and password to log into the system. You attach your responsibilities to it.

Practice 2: Create a User ID

File Switch Responsibility
Responsibility = System Administer
(N) Security-user-define

1. Name = Any ID you want e
2. Password = password (lower case) U
3. Tab
4. Enter pass word again
5. Person = your Last name % select
6. Responsibilities Select the following Responsibilities from a List of Values

· Order Management Superuser VISION OPERATIONS (USA)
· Move cursor to next row
· Purchasing Vision Operations (USA)
· Move cursor to next row
· Inventory VISION OPERATIONS (USA)
· Move cursor to next row

· Receivables VISION OPERATIONS (USA)
· Move cursor to next row
· Oracle Pricing Manager
· Move cursor to next row
· System Administrator
7. Save
8. File-Log in as a different user
9. User = Your user name
10. Password = password (lower case)
11. You will receive a message informing you that your password has expired,
Select the OK button.
12. Enter in the following data
13. Old pass word = password
14. New password= Anything you want, Record it here in case you forget later

____

15. Re-enter password = Your new password.
16. Select Order Management Superuser Responsibility

Practice 3: Manage Your Top Ten List

This practice covers establishing ten commonly used forms for your responsibility in the top ten list. Then, you can use keyboard numbers to open these forms.

Practice 3: Manage Your Top Ten List
(N) Navigator
1. Expand all menu trees of the Order Management Responsibility
2. Move over the Following forms to your Top Ten list.
· Order Organizer
· Sales Orders
· Release Sales Orders
· Transactions
· Customers Standard
· Customers Quick
· Price List
· Master Items
· Reports
· Requests

Practice 4: Enter Standard Customer

This practice covers entering a customer with two addresses and decentralized billing. With De centralized billing; each address has its goods billed to

Practice 4: Enter Standard Customer

1. Navigate Customers > Standard (T) Advanced

    Name: XX-Big City Electronics Wholesale (where XX is your initials)
    Click [B] Find and when 'Note' displays, click [B] OK.
    Click [B] New.
2. Select (T) Classification

    Profile Class: DEFAULT
    Type: External
    Class: High Technology
    Category: High Technology
    Sales Channel:Commercial
3. Select (T) Order Management

    Price List: Corporate
    Freight Terms:Prepaid
    FOB: Customer Site
    Warehouse: Seattle Manufacturing
4. Select (T) Addresses

    Click [B] New.
    Country: United States
    Address: 222 W. Las Colinas Blvd.

    Postal Code: 75039 (Note: City, State, and County will default)
5. Select (T) Business Purposes

    Usage: Bill To
    Location: BIG D
    Primary: Checked
    Move cursor to next row of the Usage field.
    Usage: Ship To
    Location: BIG D
    Primary: Checked
6. Save your work. Note the Site Number.

7. Close the Customer Addresses window.
8. Select (T) Addresses
   Click [B] New.
   Country: United States
   Address: 2020 Michigan Ave.
   Postal Code: 60600 (Note: City, State, and County will default)
9. Select (T) Business Purposes
   Usage: Ship To
   Location: CHICAGO

   Bill To: BIG D
   Primary: Unchecked
10. Save your work and note the Site Number.
11. Close the Customer Addresses window.
12. Note the Customer Number.

Practice 5: Create Items

This practice covers creating items. The products and services that your customers order are items.

You must create your items:

- Meeting the item definition requirements for sales orders.
- Assigned to the warehouses from which you ship them.

Practice 5: Create Items

1. Items > Master Items (Note: If organization window appears, select V1-Vision Operations, as Master Organization)
2. Item: XX-Palm Pilot (where XX is your initials)
3. Description: PV Palm Pilot
4. Select (M) Tools > Copy From...
5. Template: Finished Good
6. Click (B) Apply then (B) Done.
7. Save your work.
8. Select (M) Tools > Organization Assignment
9. Click the 'Assigned' checkbox for M1-Seattle and M2-Boston Manufacturing.
10. Save your work. Close the window.
11. Select (M) File > New
12. Repeat the above process to create item XX-Phone, XX-Palm Case, and XX-

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Pager

Practice 6: Process Miscellaneous Receipt Transaction

This practice covers entering stock into the Seattle and Boston warehouse to use in later scheduling and shipping practices

Practice 6: Process Miscellaneous Receipt Transaction
(M) File - Switch Responsibility
Select the Inventory, Vision Operations responsibility from the list.
(N) Transactions - Miscellaneous Transaction
Note: If organization window appears, select M1-Seattle Manufacturing. Ensure that when you enter the Miscellaneous Receipt the organization is M1. If still V1, then Navigate to Change Organization, pick M1 from the list of values and press OK
1. Date: Defaults
2. Type: Miscellaneous receipt
3. Account: 01-520-5250-0000-000. or select Misc. from the Account Aliases (pick list).
4. Click [B] Transaction Lines
5. Item: XX-Palm Pilot, Subinventory: FGI, Quantity: 1000
6. Move cursor to next row below the Item field.
7. Item: XX-Phone, Subinventory: FGI, Quantity: 1000
8. Move cursor to next row below the Item field.
9. Item: XX-Palm Case, Subinventory: FGI, Quantity: 1000
10. Move cursor to next row below the Item field.
11. Item: XX-Pager, Subinventory: FGI, Quantity: 15
12. Save your work.
13. Change organization to M2 (in Inventory reps., Change Organization - select M2 - press OK). And repeat step 3 for XX-item1. Save your work.
14. Return to the Order Management SuperUser responsibility to put the items on a price list (pre-requisite for being able to put items on a sales order). See following practice.

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