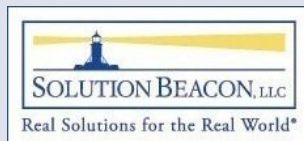


Technical Foundation Purchasing

Susan Behn
Solution Beacon, LLC.



Agenda

- Required Setups
- PO and Requisition Types
- ERD's
- Requisitions
- Purchase Orders
- Receiving
- Archiving
- Matching
- Approvals

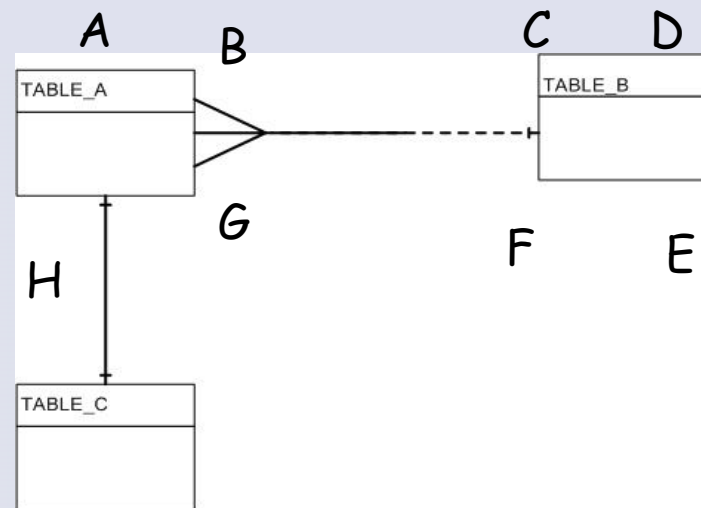
Required Setups

- **Accounting, HR, Inventory Key Flexfields**
- **Calendars, currencies, set of books, periods**
- **Locations, Organizations**
- **Units of Measure**
- **Employees, Buyers, Approval Information**
- **Financial, purchasing and receiving options**
- **Suppliers**
- **Workflow**
- **Manufacturing Application Setups**

PO and Requisition Types

- Types of Requisitions
 - Internal – sourced from inventory
 - Purchase – sourced from suppliers
- Use Auto Create to Create a PO from a Requisition Line
- Types of Purchase Orders
 - Standard – One time purchase order
 - Blanket – specify specific items, but not quantity, delivery, dist
 - Planned – specify all details - items, tentative deliveries, dist
 - Contract – Do not know specific goods/services, delivery, etc
 - Blanket Release – release of quantity, delivery, dist for blanket PO
 - Scheduled Release – release for planned PO

Reading an ERD



A
Object

B
May have
Must Have

C
One and only One
One or More

D
Object

E
Object

F
May have
Must Have

G
One and only One
One or More

H
Object

Requisitions

PO_REQUISITION_HEADERS_ALL

Segment1 is the req number
Req headers become PO
headers

PO_REQUISITION_LINES_ALL

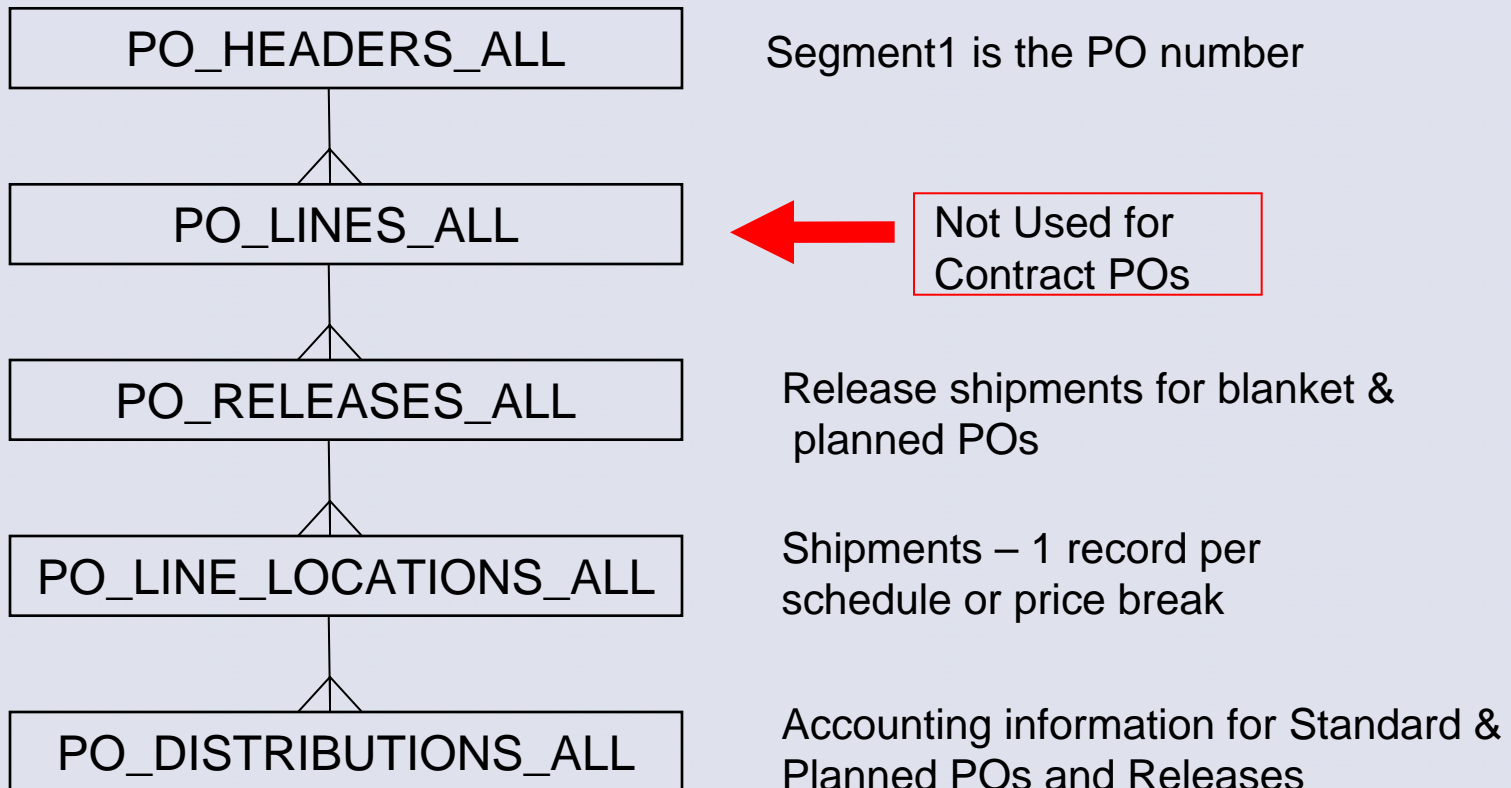
Req lines become PO lines

PO_REQ_DISTRIBUTIONS_ALL

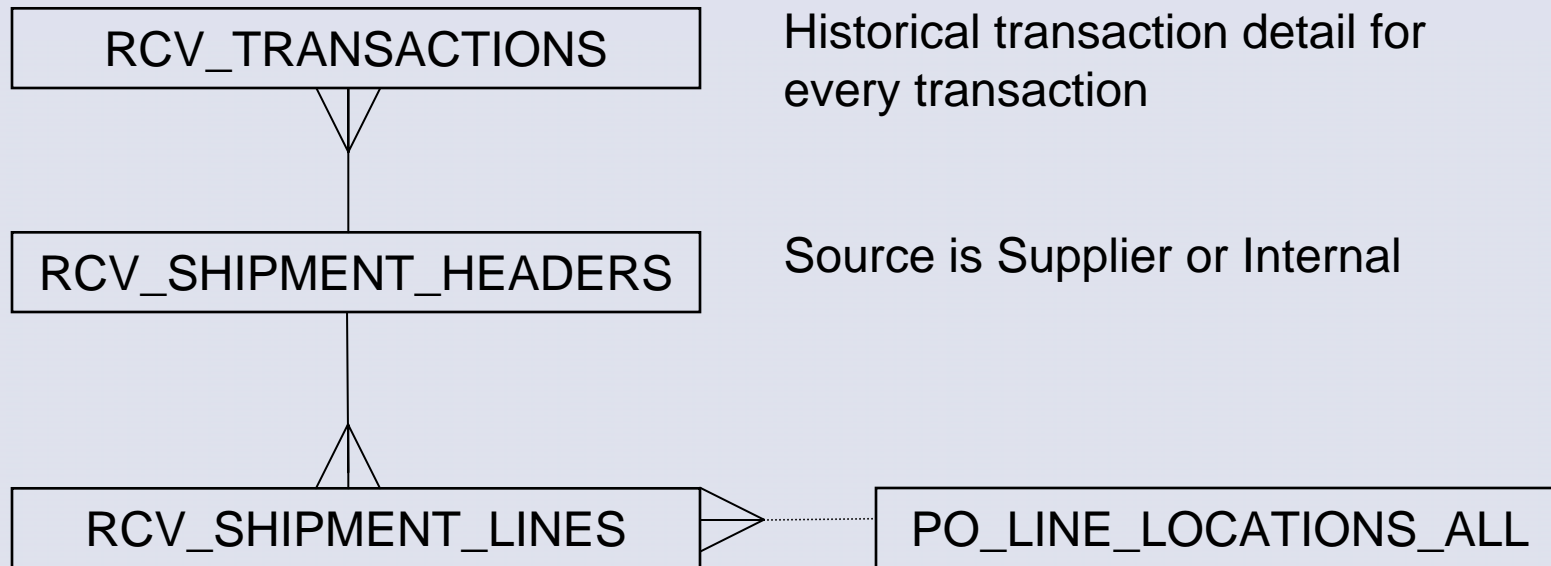
Req distributions become PO
distributions

- Use Workflow item type and item key to review approval workflow
- See MetaLink Note 295153.1 to troubleshoot approval

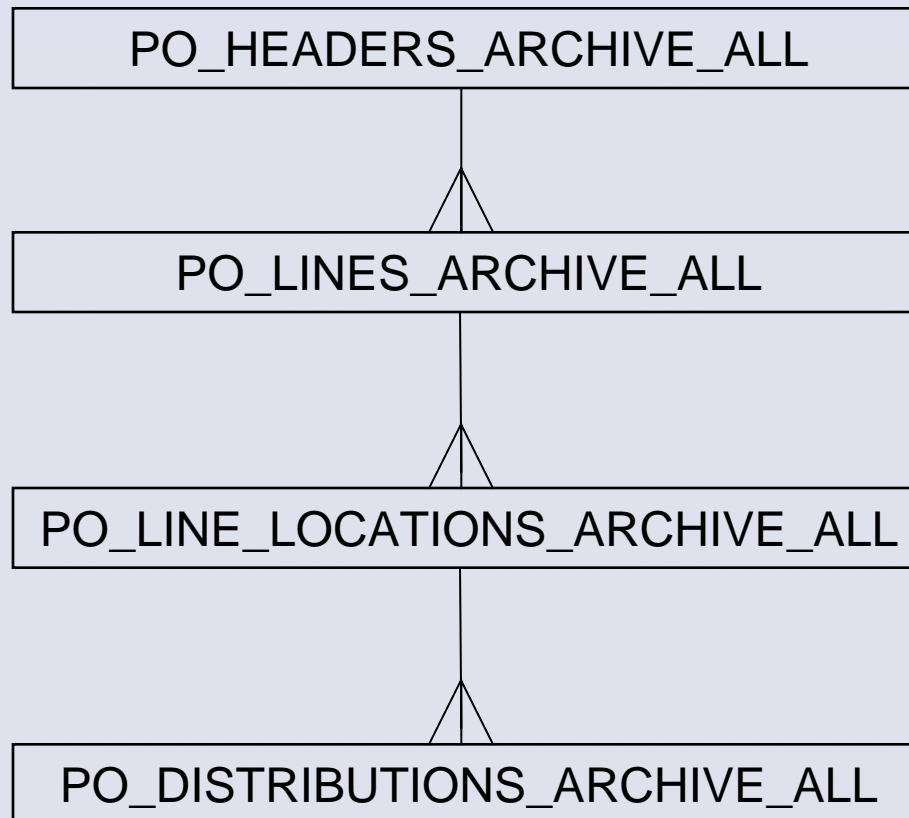
Purchase Orders



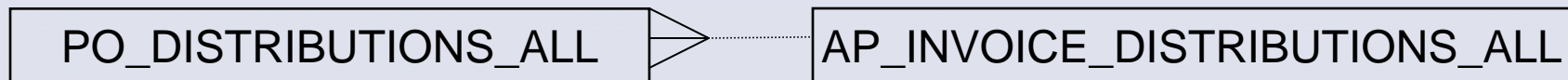
Receiving



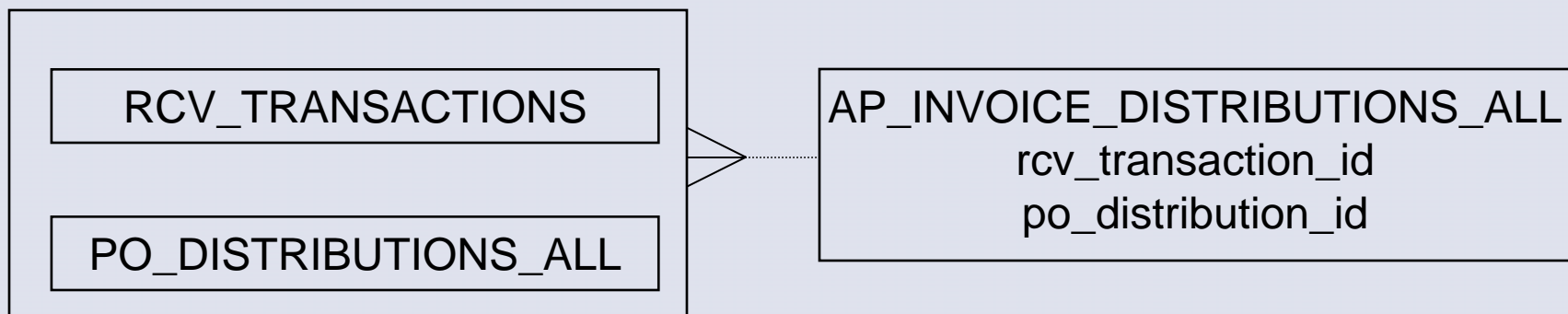
Archive Purchase Order Tables



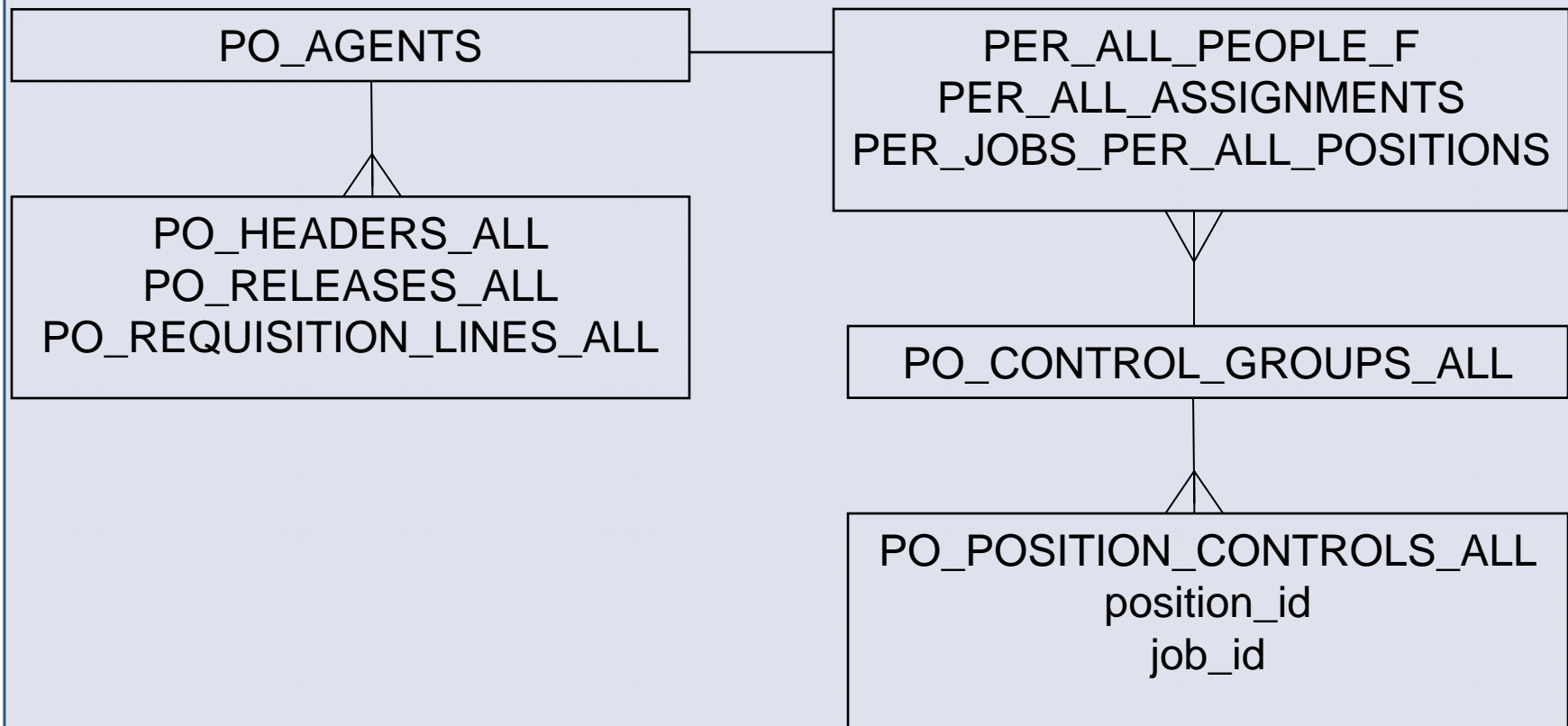
2 way matching



3 way matching



Approvals/Buyers



Questions and Answers



Thank you!

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