



Caltech

Oracle Release 12

Accounts Receivables
January 18, 2011



Agenda

- ◉ Transaction Summary Inquiry
- ◉ Customer Forms
 - R11i/R12 comparison
- ◉ Customer Overview
- ◉ Account Overview
- ◉ Site Overview
- ◉ Create Customer Contact
- ◉ Inactivate Customer
- ◉ Unit Demo
- ◉ Next Steps



Caltech

3

R11i Transaction Inquiry

Find Transactions (Caltech)

Transaction Numbers	<input type="text"/>	-	<input type="text"/>
Sales Order Number	<input type="text"/>		
Bill To			
Name	<input type="text"/>	Ship To	<input type="text"/>
Number	<input type="text"/>		<input type="text"/>
Taxpayer ID	<input type="text"/>		<input type="text"/>
Purchase Order Numbers	<input type="text"/>	-	<input type="text"/>
Document Numbers	<input type="text"/>	-	<input type="text"/>
Reference Numbers	<input type="text"/>	-	<input type="text"/>
Transaction Dates	<input type="text"/>	-	<input type="text"/>
GL Dates	<input type="text"/>	-	<input type="text"/>
Transaction Batches	<input type="text"/>	-	<input type="text"/>
Transaction Batch Sources	<input type="text"/>	-	<input type="text"/>
Transaction Types	<input type="text"/>	-	<input type="text"/>
Class	<input type="text"/>	Complete	<input type="text"/>
Primary Salesperson	<input type="text"/>	Period	<input type="text"/>
Credited Transaction	<input type="text"/>	Currency	<input type="text"/>



Caltech

R12 Transaction Inquiry

Find Transactions

Consolidated Bill Number Low **Transaction Number Low**

Transaction Numbers -

Sales Order Number

Ship To **Bill To**

Name ...

Number

Taxpayer ID

PO Numbers -

Document Number -

Reference Numbers -

Transaction Dates -

GL Dates -

Batches -

Sources -

Transaction Types -

Class Complete

Primary Salesperson Period

Credited Transaction Currency



R12 New Features

◉ Customer Forms

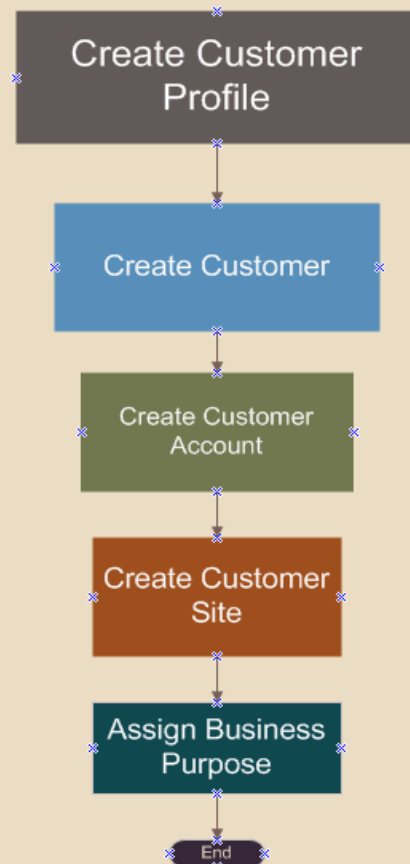
- Full Web based Forms
- Expanded fields to capture more information on customers
- Fully integrated into Oracle's Trading Community Architecture
 - Oracle Trading Community Architecture (TCA) is a module that allows organizations to manage complex information about their customers, suppliers or other parties who belong to their commercial community, including locations and the network of hierarchical relationships among them.



Caltech

R12 Create Customer Process

R12 Create Customer Process





Caltech

R12 Customer Form

All web based forms

[Cancel](#) [Save](#) [Apply](#)

Customer Type **Organization**

Customer Information

* Organization Name Alias
* Registry ID **6001039** Name Pronunciation
Context Value

Accounts **Profile** **Communication** **Party Relationships** **Tax Profile**

[Personalize "Accounts"](#)

Accounts

[Personalize "Accounts"](#)
Status

Select Account Number	Account Description	Profile Class	Primary Bill-To Address	Status	Details
6001039		COMMERCIAL	Interlibrary Loan , 2350 N Kenmore , CHICAGO, IL 60614	Active	

[Personalize Stack Layout: \(region13.AcctSitesHeaderStack\)](#)

Sites

Status Purpose
Operating Unit ☐ Show related contact sites
Address Line 2 Address Line 1
State City
Country

Address	Site Source	Mailstop	Country	Purposes	Operating Unit	Site Number	Map	Status	Details	Update	Remove
Interlibrary Loan, 2350 N Kenmore, CHICAGO, IL 60614			United States	Bill To, Ship To	Caltech	5729		Active			

[Cancel](#) [Save](#) [Apply](#)



Caltech

8

R11i Customer Form

Standard Forms

Customers - Standard

Customer Type: **Organization** ☒ Active
Name: **DEPAUL UNIV LIBRARY**
Alternate Name: **DEPAUL**
Account Name:
Organization Number: **6001039**
Customer Number: **6001039**
Tax Registration Num:
Taxpayer ID:
[]

Addresses Classification Order Management Marketing Communication Contacts Contacts : Roles []

Customer Addresses - DEPAUL UNIV LIBRARY, 6001039

Country: **United States** Site Number: **5729** ☒
Address: **Interlibrary Loan** **2350 N Kenmore**
Alternate Name:
City: **Chicago** State: **IL**
Postal Code: **60614** Province:
County: **UNKNOWN**
EDI Location:
Identifying Address: ☒ Active: ☒
Addressee:
[]

Business Purposes Characteristics Communication Contacts Contacts : Roles Bank Accounts []

Usage	Location	Bill To Location	Primary	Active	[]
<input checked="" type="checkbox"/> Bill To	ILL 2350 N Kenmore		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Ship To	ILL 2350 N Kenmore	ILL 2350 N Kenmore	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	

New Open



Caltech

9

R12 Customer Form

R12 forms have three distinct regions: customer, account, and site.

Customers >
Customer: DEPAUL UNIV LIBRARY

Customer Type **Organization**

Cancel Save Apply

Customer Information

* Organization Name DEPAUL UNIV LIBRARY Alias
* Registry ID 6001039 Name Pronunciation DEPAUL
Context Value

Accounts Profile Communication Party Relationships Tax Profile

Personalize "Accounts"

Accounts

Personalize "Accounts"
Status Active
Go

Create Account

Select Account Number	Account Description	Profile Class	Primary Bill-To Address	Status Details
6001039		COMMERCIAL	Interlibrary Loan , 2350 N Kenmore , CHICAGO, IL 60614	Active

Personalize Stack Layout: (region13.AcctSitesHeaderStack)

Sites

Status Active Purpose
Operating Unit
Address Line 2
State
Country
Go

Address Line 1
City
Show related contact sites

Create Site

Address	Site Source	Mailstop	Country	Purposes	Operating Unit	Site Number	Map	Status	Details	Update	Remove
Interlibrary Loan, 2350 N Kenmore, CHICAGO, IL 60614			United States	Bill To, Ship To	Caltech	5729		Active			

Cancel Save Apply

Customer or Party Region

Customer Account Region

Customer Site Region



Caltech

10

R11i Customer Form

11i regions combined the Customer/Account into one region and Site information as second region.

Oracle Applications - TEST from CNTRL 12/12/2010

File Edit View Folder Tools Window Help

Match Results (Organization) - (STANFORD%, A)

Customers - Standard

Customer Type **Organization** ☒ Active

Name **STANFORD UNIVERSITY**

Alternate Name **STANFORD UNIV**

Account Name

Organization Number **3CR1149**

Customer Number **3CR1149**

Tax Registration Num

Taxpayer ID

Addresses Classification Order Management Marketing Communication Contacts Contacts : Roles

Address ☐ Show Only Active Addresses

- ☒ 318 Campus Drive, Clark Center, S171, STANFORD, COUNTY UNKNOWN, CA, 94305, United States
- ☐ Dept. of Electrical Engineering, 350 Sierra Mall, Stanford, US, CA, 94305-9515, United States
- ☐ Ginston Lab, 262-D, Stanford, Unknown, Ca., 94305-4088, United States
- ☐ Physics and Astrophysics Bldg, 452 Lomita Mall, Room 249, Stanford, US, Ca, 94305-4085, United States

Duplicate Check Party Relationships New Open



Caltech

Customer Region

The customer region (also called the party) consists of high level information about the customer. The customer can be an organization or a person. There are five tabs at the customer level that users can view or update: accounts, profile, communication, party relationships and tax profiles

A screenshot of a web application interface for managing customer information. The interface has a blue header bar with the word "Customers" and a breadcrumb trail "Customers >". Below this, it says "Customer: DUKE UNIVERSITY". To the right, "Customer Type" is set to "Organization". The main section is titled "Customer Information" and contains several input fields: "* Organization Name" with the value "DUKE UNIVERSITY", "Alias" (empty), "* Registry ID" with the value "3CR1139", "Name Pronunciation" with the value "DUKE UNIV", and a "Context Value" dropdown menu. At the bottom, there are five tabs: "Accounts", "Profile", "Communication", "Party Relationships", and "Tax Profile". A red arrow points to the "Tax Profile" tab.

Customers

Customers >

Customer: DUKE UNIVERSITY

Customer Type **Organization**

Customer Information

* Organization Name Alias

* Registry ID **3CR1139** Name Pronunciation

Context Value

Accounts **Profile** **Communication** **Party Relationships** **Tax Profile**



Caltech

Account Region

A customer or party can have one or more accounts defined. You can maintain separate customer profiles for each account or you can share the profiles across the accounts. The account region contains several tabs to include sites, profile, payment, communication, relationships, order management, late charges and attachments. Users can also access the site region from the account region. Ex:

National Science Foundation

Update Account: 6001039 Cancel Save Apply

Customer Information

Name **DEPAUL UNIV LIBRARY** Customer Type **ORGANIZATION**
Registry ID **6001039**

Account

Personalize "Create Account"

* Account Number Sales Channel
Account Description Reference
Classification Status
Account Type
Award Number Prefix
Awarding Agency Code

Personalize Stack Layout: (SetActInfoHdrRN)

Sites **Account Profile** **Profile Amounts** **Payment Details** **Communication** **Relationships** **Order Management** **Late Charges** **Attachments**

Personalize Stack Layout: (SitesRN.AcctSitesHeaderStack)

Account Sites

Status Purpose
Operating Unit ☐ Show related contact sites
Address Line 2 Site Number
State Address Line 1
Country City
Go

Create Site

Address	Mailstop	Country	Purposes	Operating Unit	Site Number	Status	Details	Remove
Interlibrary Loan, 2350 N Kenmore, CHICAGO, IL 60614		United States	Bill To, Ship To	Caltech	5729	Active		



Caltech

13

Site Region

Customer sites are attached to accounts. As in 11i, a customer site can be assigned a business purpose of ship-to, bill-to, etc. Many more site 'types' have been added in R12.

Account Site Information

Site Name Alternate Name

[Personalize Stack Layout: \(SwanLakeRN\)](#)

Site Details **Business Purposes** **Communication** **Payment Details** **Profile** **Profile Amounts** **Late Charges**

Account Site Address

[Personalize "Account Site Address"](#)
[Personalize Stack Layout: \(SitesRN.AddressLocationSite.addressCreateUpdateStack\)](#)

Site Number **5729**

* Country **United States**

* Address Line 1

Address Line 2

Address Line 3

Address Line 4

City

County

State

Postal Code

Addressee

Status

☒ Identifying Address

Geography Code Override

Context Value

[Personalize Stack Layout: \(SitesRN.AcctSiteDtail\)](#)

Account Site Details

Operating Unit

Category

Territory

Translation

EDI Location

Context Value

Status Reference 5729



Caltech

14

Business Purpose Region

Once a business purpose has been designated, then the business purpose region is accessed to add additional detail for that business purpose

Account Site Business Purpose : Bill To

Organization Name	DEPAUL UNIV LIBRARY	Registry ID	6001039	<input type="button" value="Cancel"/>	<input type="button" value="Apply"/>
Account Number	6001039	Account Description			
Site Number	5729	Site Address	InterLibrary Loan, Chicago, IL, 60614		
Business Purpose	Bill To	Location	ILL 2350 N Kenmore		

Accounting

Account Class	GL Account	Description
Receivable	<input type="text"/>	
	<small>OBJECT CODE.FUNDING SOURCE.OPERATING UNIT.FUNCTION.ENTITY.PROJECT NUMBER</small>	
Revenue	<input type="text"/>	
	<small>OBJECT CODE.FUNDING SOURCE.OPERATING UNIT.FUNCTION.ENTITY.PROJECT NUMBER</small>	
Tax	<input type="text"/>	
	<small>OBJECT CODE.FUNDING SOURCE.OPERATING UNIT.FUNCTION.ENTITY.PROJECT NUMBER</small>	
Freight	<input type="text"/>	
	<small>OBJECT CODE.FUNDING SOURCE.OPERATING UNIT.FUNCTION.ENTITY.PROJECT NUMBER</small>	
Clearing	<input type="text"/>	
	<small>OBJECT CODE.FUNDING SOURCE.OPERATING UNIT.FUNCTION.ENTITY.PROJECT NUMBER</small>	
Unbilled Receivable	<input type="text"/>	
	<small>OBJECT CODE.FUNDING SOURCE.OPERATING UNIT.FUNCTION.ENTITY.PROJECT NUMBER</small>	
Unearned Revenue	<input type="text"/>	
	<small>OBJECT CODE.FUNDING SOURCE.OPERATING UNIT.FUNCTION.ENTITY.PROJECT NUMBER</small>	

Charges Activity

Site Use Details

Sales Territory	<input type="text"/>	Payment Terms	<input type="text"/>
	<small>Country, City</small>		
Salesperson	Library 626-395-6774	Contact	<input type="text"/>
SIC Code	<input type="text"/>		

Order Management

Order Type	<input type="text"/>	Freight Terms	<input type="text"/>
Price List	<input type="text"/>	Free On Board Point	<input type="text"/>
Item Type Identifier	<input type="text"/>	Warehouse	<input type="text"/>
Request Date Type	<input type="text"/>	Ship Method	<input type="text"/>
Earliest Schedule Limit	<input type="text"/>	Over Shipment Tolerance	<input type="text"/>
Latest Schedule Limit	<input type="text"/>	Under Shipment Tolerance	<input type="text"/>
Overship Invoice Base	<input type="text"/>	Over Return Tolerance	<input type="text"/>
Under Return Tolerance	<input type="text"/>	Demand Class	<input type="text"/>

☐ General Services Administration ☐ Lines In ☐ Aerial Site



Search

[Personalize "Search"](#)

Simple Search

[Personalize "Simple Search"](#)

Customer

Registry ID

Account Number

Account Description

Tax Registration Number

Taxpayer ID

D-U-N-S Number

SIC Code

Account Type

Customer Class

Customer Category

Reference

DEPAUL%

Go

Clear

Contact First Name

Contact Last Name

Contact Phone Number

Address Line 1

Address Line 2

City

State

Postal Code

County


Province

Country

Status

Active

Create

Select Name	Registry ID	D-U-N-S Number	Address	Country	Primary URL	Status
 DEPAUL UNIV LIBRARY	6001039		Interlibrary Loan, 2350 N Kenmore, CHICAGO, IL 60614	United States		Active

Accounts


[Personalize "Accounts"](#)

Status

Active

Go

Create Account

Account Number	Account Description	Profile Class	Primary Bill-To Address	Status Details
6001039		COMMERCIAL	Interlibrary Loan , 2350 N Kenmore , CHICAGO, IL 60614	Active 



Create Customer

From the main search page, select the 'Create' button.

Customers

Customers

Customer Type Organization

Search

[Personalize "Search"](#)

Simple Search

[Personalize "Simple Search"](#)

Customer

Registry ID

Account Number

Account Description

Tax Registration Number

Taxpayer ID

D-U-N-S Number

SIC Code

Account Type

Customer Class

Customer Category

Reference

Go

Clear

Contact First Name

Contact Last Name

Contact Phone Number

Address Line 1

Address Line 2

City

State

Postal Code

County

Province

Country

Status

Active

Create



Create Customer

Enter the organization name in the customer information region. All items with an asterisk * are required fields. The account number and address information must also be entered.

Customers

Customers >

Create Organization

Customer Type **ORGANIZATION**

Customer Information

* Organization Name

DEPARTMENT OF HOME

Alias

Name Pronunciation

D-U-N-S Number

URL

Must include: http//

Context Value

[Personalize Stack Layout: \(ArUtilRN\)](#)

Account Information

[Personalize "Account Information"](#)

* Account Number

2CR10000

Account Description

Profile Class

SPONSORED

Account Type

External

Reference

Award Number Prefix

Awarding Agency Code



Create Customer

Enter the Account site address information. All items with an asterisk * are required fields.

Account Site Address

[Personalize "Account Site Address"](#)
[Personalize Stack Layout: \(addressRN.AddressLocationSite.addressCreateUpdateStack\)](#)

* Country

United States

* Address Line 1

125 S Clark Street

Address Line 2

Address Line 3

Address Line 4

City

Chicago

County

Cook

State

IL

Postal Code

60603

Address Description

☒ Identifying Address

Geography Code Override

Context Value

[Personalize Stack Layout: \(addressRN.AcctSiteDetail\)](#)

Account Site Details

Operating Unit

Caltech

Category

Territory

Translation

EDI Location

Reference

Context Value



Caltech

Create Customer

Enter the business purpose for the address site. Select the 'bill-to' site purpose and location name, then select the 'apply' button below. **Note:** the location field is required even though it does not have an asterisk.

[Personalize Stack Layout: \(addressRN.AcctSiteDetail\)](#)

Account Site Details

Operating Unit	Caltech ▼	Reference	<input type="text"/>
Category	▼		
Territory	▼		
Translation	<input type="text"/>		
EDI Location	<input type="text"/>		
Context Value	▼		

[Personalize Stack Layout: \(addressRN.AcctSitePurposes.BizPurposeHeaderStack\)](#)

Business Purposes

[Personalize Stack Layout: \(addressRN.AcctSitePurposes.BizPurposeTableStack\)](#)

Context Value	▼			
Purpose	Location	Bill To Location	Primary	Remove
Bill To ▼	<input type="text" value="CHICAGO"/>	<input type="text"/>	<input checked="" type="checkbox"/>	
<input type="button" value="Add Another Row"/>				



Create Customer

Select add another row to enter the 'ship-to' site purpose and location name, then select the 'apply' button below. **Note:** the location field is required.

Personalize Stack Layout: (SwanLakeRN)

Site Details Business Purposes Communication Payment Details Profile Profile Amounts Late Charges

Personalize Stack Layout: (BusinessPurposeRN.BizPurposeStatusStack)

Status Active

Personalize Stack Layout: (BusinessPurposeRN.BizPurposeTableStack)

Select Purpose	Location	Bill To Location	Primary	Details	Remove
<input checked="" type="radio"/> Bill To	CHICAGO		<input checked="" type="checkbox"/>		
<input type="radio"/> Ship To	CHICAGO2	CHICAGO	<input checked="" type="checkbox"/>		

Add Another Row

Additional Details: Bill To

Personalize "Additional Details:"

Context Value

Cancel Save Apply



Create Customer Contact

○ Customer Contacts

- In R12, customer contacts are required in order to view the customer in Grants. This is the same as in R11i.
- After the contact is created, the contact must be associated to the site at the business purpose level
- Associate customer contacts with bill-to and ship-to at the site level using the details button.
- The create contact button is available under the communication tab.



Caltech

22

Create Customer Contact

From the communication tab in the customer account, select the create customer contact button.

Customers >
Update Account: 2CR10000

Cancel Save Apply

Customer Information

Name **DEPARTMENT OF HOMELAND** Customer Type **ORGANIZATION**
Registry ID **211275**

Account

[Personalize "Create Account"](#)

* Account Number
Account Description
Classification
Account Type
Award Number Prefix
Awarding Agency Code

Sales Channel
Reference 20944
Status

[Personalize Stack Layout: \(SetActInfoHdrRN\)](#)

Sites Account Profile Profile Amounts Payment Details **Communication** Relationships Order Management Late Charges Attachments

Account Contacts

[Personalize "Account Contacts"](#)

Status
Show Contacts
Go

Assign Primary by Role **Create Contact**

Name	Contact Number	Mail Stop	Job Title	Reference	Status	Details	Update	Remove
No results found.								



Caltech

23

Create Customer Contact

From the communication tab in the customer account, select the create customer contact button.

Customers

Customers > Customer Account >

Create Account Contact

Customer Account Information

Organization Name	DEPARTMENT OF HOMELAND	Registry ID	211275
Account Number	2CR10000	Account Description	

Contact Information

[Personalize Stack Layout: \(createContactRN\)](#)

Person Information	Address
Personalize "Address" Personalize Stack Layout: (createContactRN.addressRegion.addressCreateUpdateStack) Personalize Flow Layout: (createContactRN.addressRegion.RegTextRN) * Indicates field that is required only if entering an address	
TIP Only a first or last name is required.	* Country <input type="text" value="United States"/>
Prefix <input type="text"/>	* Address Line 1 <input type="text" value="125 S Main Street"/>
First Name <input type="text" value="JANET"/>	Address Line 2 <input type="text"/>
Middle Name <input type="text"/>	Address Line 3 <input type="text"/>
Last Name <input type="text" value="DOE"/>	Address Line 4 <input type="text"/>
Suffix <input type="text"/>	City <input type="text" value="Chicago"/>
Email <input type="text"/>	County <input type="text" value="Cook"/>
Phone Number <input type="text"/>	State <input type="text" value="IL"/>
Phone Ext <input type="text"/>	Postal Code <input type="text" value="60603"/>
Mobile Number <input type="text"/>	<input checked="" type="checkbox"/> Identifying Address
Contact Number <input type="text"/>	Geography Code Override <input type="text"/>
Job Title Code <input type="text"/>	Mailstop <input type="text"/>
Job Title <input type="text"/>	Context Value <input type="text"/>
Context Value <input type="text"/>	

Contact Details

[Personalize Stack Layout: \(createContactRN.region32.region3\)](#)

Reference

Context Value



Create Customer Contact

After the contact is created, the contact must be associated at both the bill-to and ship-to business purpose at the site level. Select the detail button at both levels to attach the customer contact.

Account Site Information

Site Name






[Personalize Stack Layout: \(SwanLakeRN\)](#)

Site Details **Business Purposes** **Communication** **Payment Details** **Profile** **Profile Amounts** **Late Charges**

[Personalize Stack Layout: \(BusinessPurposeRN.BizPurposeStatusStack\)](#)

Status

[Personalize Stack Layout: \(BusinessPurposeRN.BizPurposeTableStack\)](#)

Select Purpose	Location	Bill To Location	Primary	Details	Remove
<input checked="" type="radio"/> Bill To	<input type="text" value="CHICAGO"/>		<input checked="" type="checkbox"/>		
<input type="radio"/> Ship To	<input type="text" value="CHICAGO2"/>	<input type="text" value="CHICAGO"/> 	<input checked="" type="checkbox"/>		



Caltech

25

Create Customer Contact

After the contact is created, the contact must be associated at both the bill-to and ship-to business purpose at the site level. Select the detail button at both levels to attach the customer contact.

Customers

Customers > Customer Account > Account Site >

Account Site Business Purpose : Bill To

Organization Name	DEPARTMENT OF HOMELAND	Registry ID	211275
Account Number	2CR10000	Account Description	
Site Number	115652	Site Address	125 S Clark Street, Chicago, IL, 60603
Business Purpose	Bill To	Location	CHICAGO

Accounting

Account Class	GL Account	Description
Receivable	<input type="text"/>	<input type="text"/>
Revenue	<input type="text"/>	<input type="text"/>
Tax	<input type="text"/>	<input type="text"/>
Freight	<input type="text"/>	<input type="text"/>
Clearing	<input type="text"/>	<input type="text"/>
Unbilled Receivable	<input type="text"/>	<input type="text"/>
Unearned Revenue	<input type="text"/>	<input type="text"/>

Charges Activity

Site Use Details

Sales Territory	<input type="text"/>	Payment Terms	<input type="text"/>
Country, City	<input type="text"/>	Contact	JANET DOE
Salesperson	<input type="text"/>		
SIC Code	<input type="text"/>		

Order Management



Create Customer Contact

After the contact is created, the contact must be associated at both the bill-to and ship-to business purpose at the site level. Select the detail button at both levels to attach the customer contact.

Close Window Preferences Help Personalize Page

Customers

Customers > Customer Account > Account Site >

Account Site Business Purpose : Ship To

Organization Name	DEPARTMENT OF HOMELAND	Registry ID	211275	<input type="button" value="Cancel"/> <input type="button" value="Apply"/>
Account Number	2CR10000	Account Description		
Site Number	115652	Site Address	125 S Clark Street,Chicago,IL,60603	
Business Purpose	Ship To	Location	CHICAGO2	

Site Use Details

Sales Territory	<input type="text"/>	Payment Terms	<input type="text"/>
Country, City	<input type="text"/>	Contact	JANET DOE
Salesperson	<input type="text"/>		

Order Management

Order Type	<input type="text"/>	Freight Terms	<input type="text"/>
Price List	<input type="text"/>	Free On Board Point	<input type="text"/>
Item Type Identifier	<input type="text"/>	Warehouse	<input type="text"/>
Request Date Type	<input type="text"/>	Ship Method	<input type="text"/>
Earliest Schedule Limit	<input type="text"/>	Over Shipment Tolerance	<input type="text"/>
Latest Schedule Limit	<input type="text"/>	Under Shipment Tolerance	<input type="text"/>
Overship Invoice Base	<input type="text"/>	Over Return Tolerance	<input type="text"/>
Under Return Tolerance	<input type="text"/>	Demand Class	<input type="text"/>
Internal Location	<input type="text"/>	Internal Organization	<input type="text"/>

☐ General Services Administration
☐ Push Group Schedule Date

Lines In ☐ Arrival Sets ☐ Ship Sets



Caltech

27

R11i Inactivate Customer

In 11i, you could inactivate a customer from Oracle Receivables.

The screenshot shows the 'Customers - Standard' form in Oracle R11i. The 'Customer Type' is set to 'Organization'. The 'Name' field contains 'DEPAUL UNIV LIBRARY'. The 'Alternate Name' field contains 'DEPAUL'. The 'Account Name' field is empty. The 'Organization Number' is '6001039'. The 'Customer Number' is '6001039'. The 'Tax Registration Num' and 'Taxpayer ID' fields are empty. The 'Active' checkbox is checked, and an orange arrow points to it. The 'Addresses' tab is selected, and the 'Show Only Active Addresses' checkbox is unchecked. The address list contains one entry: 'Interlibrary Loan, 2350 N Kenmore, Chicago, Cook, IL, 60614, United States'. The bottom of the form has buttons for 'Duplicate Check', 'Party Relationships', 'New', and 'Open'.

Customer Type	Organization	<input checked="" type="checkbox"/> Active	Organization Number	6001039
Name	DEPAUL UNIV LIBRARY		Customer Number	6001039
Alternate Name	DEPAUL		Tax Registration Num	
Account Name			Taxpayer ID	

Addresses Classification Order Management Marketing Communication Contacts Contacts : Roles

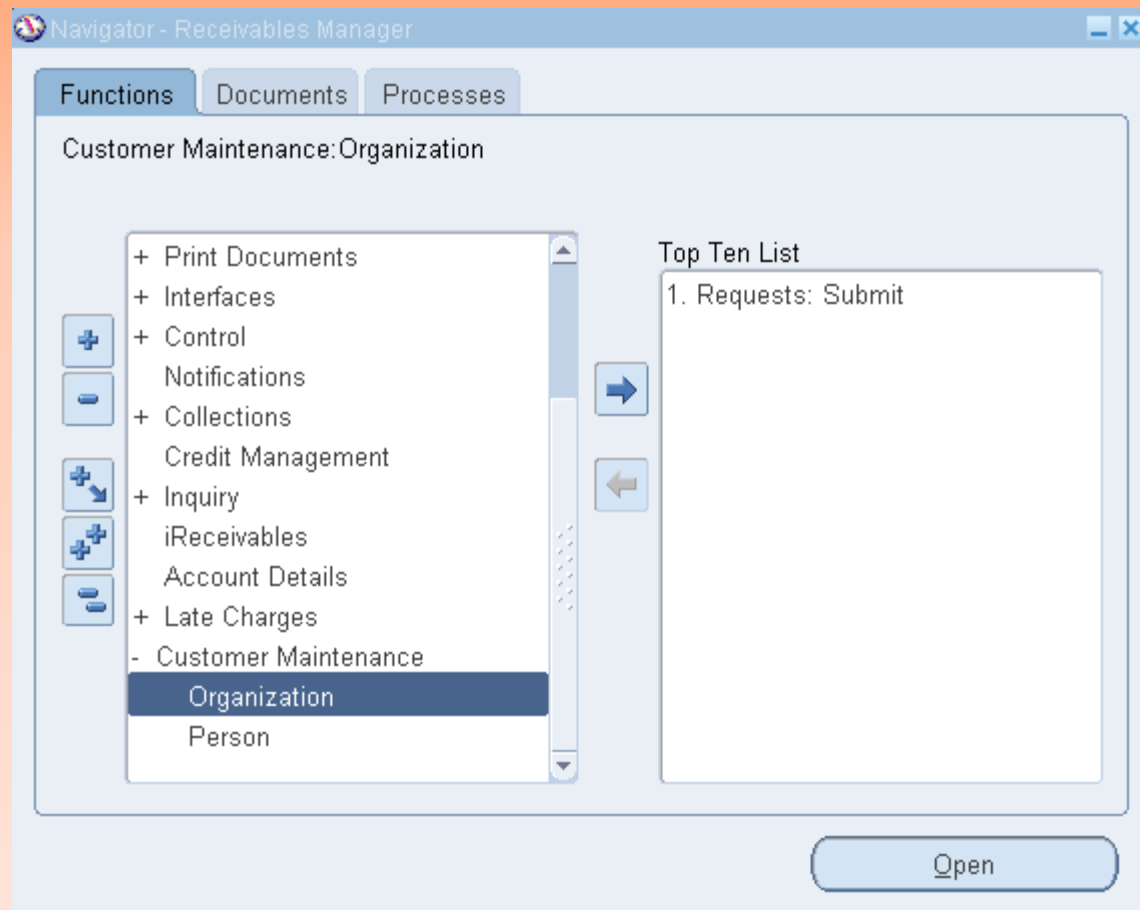
Address ☐ Show Only Active Addresses

<input checked="" type="checkbox"/>	Interlibrary Loan, 2350 N Kenmore, Chicago, Cook, IL, 60614, United States
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	



R12 Inactivate Customer

In 12, you will inactivate a customer from a TCA web form. The new navigation path is displayed below.





R12 Inactivate Customer

In 12, you will inactivate a customer from a TCA web form. The menu item is added to Oracle Receivables.

Search

Name

STANFORD UNIVERSITY%

Registry ID

D-U-N-S

Web Site

Number

Account

Taxpayer ID

Number

Country

Certification

Level

Certification

Reason

Status

Internal

Indicator

Go

Clear

Party Name	Registry ID	Address	Country	Match Percentage	Certification Level	Certification Reason	Internal Indicator	Status
STANFORD UNIVERSITY	3CR1149	318 Campus Drive,	US	100%				Active



R12 Unit Demo

- ◉ Transaction Summary Inquiry
 - Query and review existing transaction
- ◉ Customers
 - Query and review existing customer
 - Create new customer
 - Create new customer accounts
 - Create new customer sites with business purpose
 - Create customer contacts
 - Associate customer contacts with bill-to and ship-to



Caltech

Q&A