

More4apps

Functional Impact Document

Purchase Order Wizard

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Release 4.6.39 – 29/03/2021

This release includes enhancements. In the scenario that an old template is copied into the new version of the Wizard, any new columns need to be added into the copied sheet to ensure new functionalities work.

1.1. Added New Quantity Columns in the Shipments Section

Version: 4.6.23

Date: 26/11/2020

Added the following read-only columns:

- Ship Quantity Received
- Ship Quantity Billed
- Ship Quantity Cancelled

Applicable to the modes below:

- PO Close
- Blanket Release Close
- Cancel PO
- Change API

Shipments							
Ship Message	Ship Number	Ship Action	Ship Closing Reason	Ship Current Status	Ship Qty Received	Ship Qty Billed	Ship Qty Cancelled
	1			Open	1400	1400	0
	1			Open	1400	1400	0

Note: The 'Ship Qty Cancelled' column is not available in Change API mode. The download filter will exclude cancelled shipments as updates are not allowed.

Release 4.6.22 - 24/11/2020

This release includes various bug fixes, enhancements and performance improvements. In the scenario that an old template is copied into the new version of the Wizard, any new columns need to be added into the copied sheet to ensure new functionalities work.

1.1. Add New Column 'Break Action' in Blanket Purchase Agreement Mode

Version: 4.6.08

Date: 24/06/2020

The 'Break Action' column is added to the Price Break/Shipments Information section in the Blanket Purchase Agreement mode. This functionality is available to add price breaks to existing Blanket Purchase Agreement lines. Select 'ADD' in the 'Break Action' and the process action should be 'Update'.

Note: For creating Blanket Purchase Agreements and price breaks simultaneously, the process action is 'Create' and the 'Break Action' does not require a value.

Price Break/Shipments Information										
Break Message	Break ID	Break Action	Break Number	Break UOM	Break Ship To Org	Break Ship To	Break Quantity	Break Effective From	Break Effective To	Break Price
		ADD	1	Each	M1	San Francisco	100	11/11/2020	11/12/2020	1000

1.2. Added New Columns Notification Method and Email

Version: 4.5.99

Date: 12/02/2020

Added new read-only columns, 'Notification Method' and 'Email' in Autocreate mode.

Header Information											
Header Message	Header ID	PO Number	Requisition Number	Req Import Source	Req Requester	Req Preparer	Status	Supplier	Site	Notification Method	Email

Release 4.5.98 - 08/04/2020

This release includes various bug fixes, enhancements, the new branding and colors.

1.1. New More4apps Branding – New Logo and Colors

Version: 4.5.95

Date: 01/04/2020

New More4apps brand applied. This will have no functional impact and is purely a cosmetic update. Existing templates with previous styles will work with this version, please note however, the colors may change in these sheets when invoking Wizard functionality.



Purchase Order Wizard

Batch ID Request ID
821620 6346589

Blanket Purchase Agreement

Statuses					Header Information												
Header Status	Header Attach Status	Line Status	Line Attach Status	Break Status	Header Message	Header ID	Approval Status	PO Number	Status	Supplier	Supplier Number	Site	Contact	Header Ship To	Bill To	Buyer	Description
Default Values																	
Accepted		Accepted				1253856		41107	Incomp	Office Su	1008			OFF Olden, NJ	V1- New York	V1- New York	Blanket PO
		Accepted															
		Accepted															
		Accepted															

1.2. Autocreate - Download Requisition Lines

Version: 4.5.92

Date: 12/02/2020

In Autocreate mode, the download of requisition lines can now be ordered by the requisition line number. Check the Requisition Line checkbox in the Download form 'Order By' section.

[Rata Demo VIS9 12.1.3] Download

Search By

Requisition Search Criteria

Requisition Number ...

Supplier ...

Site

Supplier List ...

Approval Status

Import Source ...

Requester ...

Buyer ...

Preparer ...

Need By Date To

Creation Date To

Order By

Requisition Number Preparer Supplier Site

Buyer Item Requisition Line

Requester Supplier

Download Clear Cancel

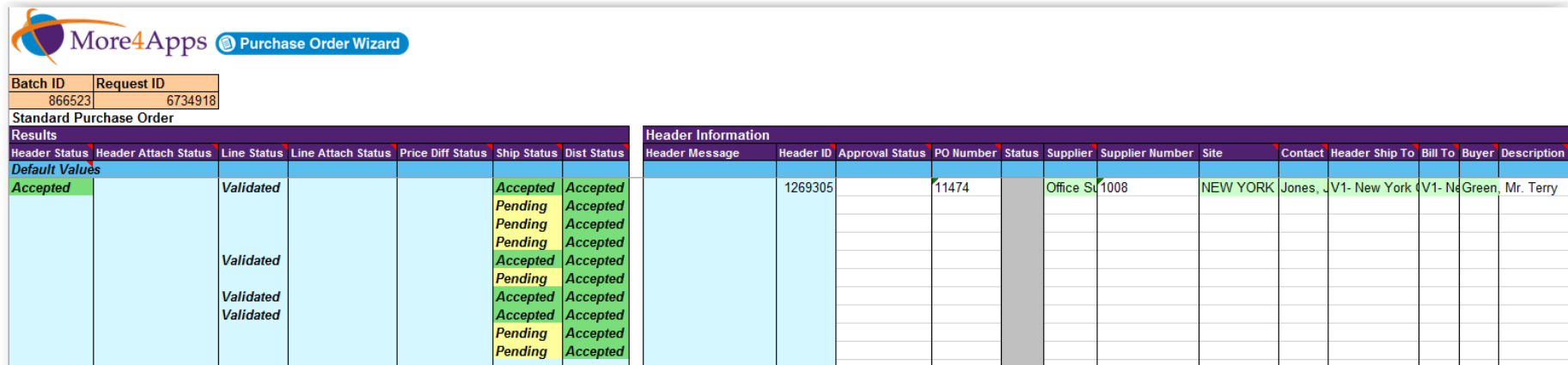
This release includes various bug fixes and enhancements/changes to the Wizard. In the scenario that an old template is copied into the new version of the Wizard, any new columns need to be added into the copied sheet to ensure new functionalities work.

1.1. Added New Color Scheme

Version: 4.5.56

Date: 20/03/2019

More4Apps has implemented a new color scheme, see below for an example:



Results							Header Information													
Header Status	Header Attach Status	Line Status	Line Attach Status	Price Diff Status	Ship Status	Dist Status	Header Message	Header ID	Approval Status	PO Number	Status	Supplier	Supplier Number	Site	Contact	Header Ship To	Bill To	Buyer	Description	
Default Values																				
Accepted		Validated			Accepted	Accepted		1269305		11474		Office S	1008	NEW YORK	Jones, J	V1- New York	V1- New York	Green	Mr. Terry	
					Pending	Accepted														
					Pending	Accepted														
		Validated			Pending	Accepted														
					Accepted	Accepted														
		Validated			Pending	Accepted														
		Validated			Accepted	Accepted														
					Pending	Accepted														
					Pending	Accepted														

1.2. Improve Download Performance

Version: 4.5.53

Date: 11/02/2019

Upgraded download query to improve the download performance.

1.3. Download Criteria PO Line Number

Version: 4.5.51

Date: 21/01/2019

Added download criteria PO number and line number combination in Download via Sheet. This is available in Standard PO, Change API, PO Close, Blanket Release Close and Cancel PO modes.

Enter the PO number and line number combination on the sheet as illustrated below:

Header Information													Line Information		
Header Message	Header ID	Approval Status	PO Number	Status	Supplier	Supplier Number	Site	Contact	Header Ship To	Bill To	Buyer	Description	Line Message	Line ID	Line Number
			8130												10
			8130												21
			8130												22

Downloaded Data

Header Information													Line Information			
Header Message	Header ID	Approval Status	PO Number	Status	Supplier	Supplier Number	Site	Contact	Header Ship To	Bill To	Buyer	Description	Line Message	Line ID	Line Number	Line Type
	211276		8130	Incom	Advance	1013	FRE	Ackerm	M1- Seattle Mf	V1- Ne	Stock, Ms. Pat		290512	10		Goods
													290521	21		Goods
													290522	22		Goods

1.4. Download Criteria Item Number

Version: 4.5.46

Date: 04/12/2018

Added the criteria to download by PO number and item number combination in Change API mode. Enter the PO number and item number combination on the sheet as illustrated below:

Change API Results				Header Information								Line Information			
Header Status	Line Status	Ship Status		Header Message	Header ID	Approver	PO Number	Document Type	Status	Description	Line Message	Line ID	Line Number	Item	
<i>Default Values</i>							8130							120000	

Downloaded Data

Change API Results			Header Information						Line Information										
Header Status	Line Status	Ship Status	Header Message	Header ID	Approver	PO Number	Document Type	Status	Description	Line Message	Line ID	Line Number	Item	Item Description	Release Number	Release Status	Current Quantity	New Quantity	Current Price
Default Values				211276		8130	STANDARD	Incomplete			I290505	2		f20000	Paper - Purchased 2-way match office supply iter	600			20.22
											I290507	4		f20000	Paper - Purchased 2-way match office supply iter	800			20.3

1.5. Include Contingent Workers in Requester

Version: 4.5.40

Date: 02/11/2018

Included Contingent workers in the list of values for the Requester field.

1.6. Validation for 'In Process' Purchase Orders

Version: 4.5.33

Date: 03/09/2018

Added validation to reject update if the PO status is 'In Process', applicable to PO Close, Cancel PO and Blanket Release Close modes.

1.7. Added Requisition Number and Line Number

Version: 4.5.32

Date: 20/03/2018

Added read-only columns – Requisition Number and Line Number in the Distribution section of the Standard PO template.

Distribution Information										
Dist Message	Dist ID	Dist Number	Amount Ordered	Destination Type	Dist Quantity	Requestor	Requestor Number	Deliver To Location	Requisition Number	Requisition Line Number
	563806	1		Expense	1	Marlin, Ms	34	V1- New York City	14937	2

1.8. Removed 'New Sourcing Rule' column

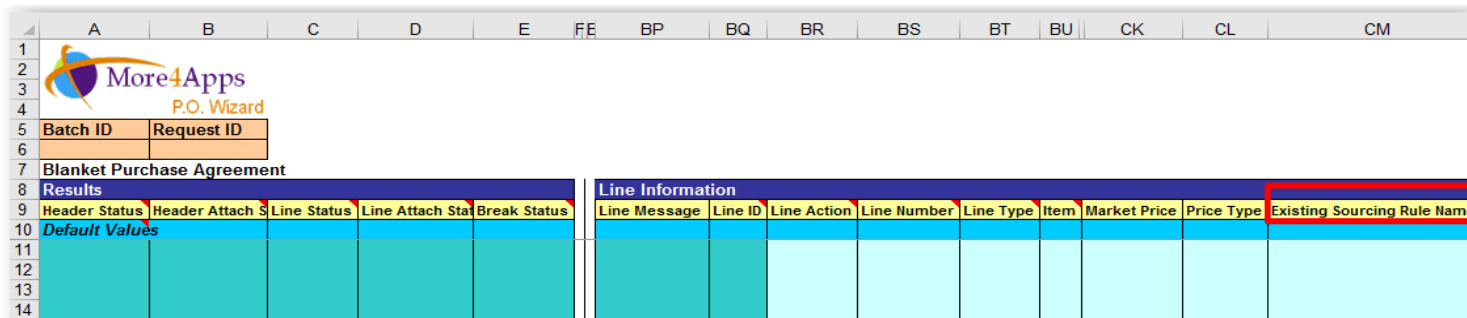
Version: 4.5.12

Date: 18/05/2018

Removed the column 'New Sourcing Rule' from Blanket Purchase Agreement template. The concurrent program "Generate Sourcing Rules and ASLs from Blanket Agreements" by default uses the naming convention for the sourcing rule name, "PURCH_" concatenated with the sourcing rule Id for the new sourcing rule name (eg PURCH_50214).

'Existing Sourcing Rule Name' column allows the user to update an existing rule.

Note - Header Effective From/To fields are required when creating sourcing rules from Blanket Agreements.



	A	B	C	D	E	FE	BP	BQ	BR	BS	BT	BU	CK	CL	CM
1	More4Apps														
2	P.O. Wizard														
3															
4															
5	Batch ID	Request ID													
6															
7	Blanket Purchase Agreement														
8	Results														
9	Header Status	Header Attach S	Line Status	Line Attach Sta	Break Status	Line Message	Line ID	Line Action	Line Number	Line Type	Item	Market Price	Price Type	Existing Sourcing Rule Name	
10	Default Values														
11															
12															
13															
14															

Note- The columns 'New Sourcing Rule Name' and 'Existing Sourcing Rule Name' are available in the Quotation template. The Import Program allows the user to specify a new sourcing rule name or update an existing sourcing rule.

Batch ID		Request ID	
782004		6514063	
Quotation			
Results			
Header Status	Header Attach Status	Line Status	Line Attach Break Status
Default Values			
Accepted		Accepted	
Accepted		Accepted	

Line Information											Sourcing Rules			
Line Message	Line ID	Line Number	Line Type	Item	Line Description	Revision	Category	UOM	Price	Start Date	End Date	Existing Sourcing Rule Name	New Sourcing Rule Name	
	1E+06	1	Goods	CRTEST2	Test PC Assembly		PRODUC	Each	16.3	7/1/2018	7/31/2018	PURCH_76246		
	1E+06	1	Goods	DW130506-2	Test Item 130506-1		MISC.MIS	Each	100	7/1/2018	7/31/2018		DWSR_1	

1.9. Approval Status Parameter in Submit Autocreate API Program

Version: 4.4.76

Date: 14/12/2017

Added Approval Status window to the Submit Autocreate API program. Users can select Incomplete or Approved status for the purchase orders autocreated from requisitions.

OPERATIONS@Cobain 12.1.3
 Purchasing, Vision Operations (USA)
 Vision Operations
 Login Info

Form -
 (-) Descriptive Flexfield -
 AutoCreate New Sheet

Validate Option
 Validate and Upload

Format Data -

Clear Status Columns
 Delete from Interface

Upload Download Attachments

Submit Autocreate API
 Concurrent

Session Login Info Purchase Order Wizard

Header Status	Header Attach Status	Line Status	Line Attach Status	Req Dist Status	Header Message	Header ID	PO Number	Requisition Number	Req Import Source	Req Requester	Req Preparer	Status	Supplier	Site	Contact	Header Ship To	Bill To
Pending		Pending		Validated		1226777		21964	ReqWizard	Stock, Ms. Pat	Stock, Ms. Pat		Advance	FRESNO		V1- New York	V1- Ne
Pending		Pending		Validated		1226778		24162		Stock, Ms. Pat	Stock, Ms. Pat		Advance	FRESNO		V1- New York	V1- Ne

[Cobain 12.1.3] Autocreate Approval Status

Approval Status:

- Approved
- Incomplete
- Approved

1.10. Download Secondary UOM and Secondary Quantity

Version: 4.4.74

Date: 14/12/2017

In Autocreate mode, if the requisition has items that have Secondary tracking, the download will populate the Secondary UOM and Secondary Quantity columns. These fields are not updatable.

Header Status	Header Attach Status	Line Status	Line Attach Status	Req Dist Status	Line Message	Line ID	Req Line ID	Req Line Number	Line Type	Item	Line Description	Item Description	Job	Revision	Category	UOM	Quantity	Secondary UOM	Secondary Quantity	Price	
Default Values																					

1.11. Added Secondary UOM and Secondary Quantity Columns

Version: 4.4.74

Date: 14/12/2017

Added Secondary UOM and Secondary Quantity columns at line and shipment levels in Standard PO template. This functionality allows you to perform transactions in units other than the primary unit of the item being purchased. The items to be purchased must have tracking set as 'Primary and Secondary'.

When a user enters the primary quantity in the 'Quantity' field, the secondary quantity will default based on the UOM conversion defined in Oracle EBS.

Note: If the Secondary Quantity is changed after the conversion has occurred, there will be no reverse conversion from the secondary to primary quantity.

Header Status	Header Attach Status	Line Status	Line Attach Status	Price Diff Status	Ship Status	Dist Status	Line Message	Line ID	Line Number	Line Type	Catalog Item	Item	Line Description	Job	Revision	Category	UOM	Quantity	Secondary UOM	Secondary Quantity	Price	
Default Values																						
								423931	1	Goods	CM1	CM11222_6				MISC.MISC	Each	2.2	Box	10	100	

1.12. Added 'Close for Receiving'

Version: 4.4.58

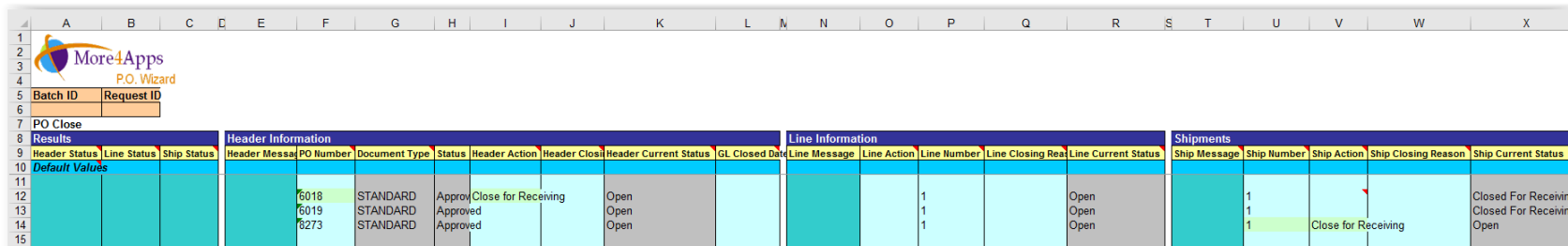
Date: 30/10/2017

Added control action, 'Close for Receiving' in PO Close mode. This allows the user to manually close for receiving at the header and shipment levels.

Closed for Receiving indicates that you won't be able to create a receipt for the particular shipment.

Closed for Receiving is a soft close and you can reopen the receipt.

Note - If you close for receiving a purchase order header that is currently open, the status of all purchase order shipments will be set to Closed for Receiving, but the purchase order lines and header remain open.



Header Information		Line Information							Shipments								
Header Message	PO Number	Document Type	Status	Header Action	Header Close	Header Current Status	GL Closed Date	Line Message	Line Action	Line Number	Line Closing Reason	Line Current Status	Ship Message	Ship Number	Ship Action	Ship Closing Reason	Ship Current Status
Default Values																	
	6018	STANDARD	Approved	Close for Receiving		Open				1		Open		1			Closed For Receiving
	6019	STANDARD	Approved			Open				1		Open		1			Closed For Receiving
	6273	STANDARD	Approved			Open				1		Open		1	Close for Receiving		Open

1.13. Implemented Blanket Release Close Mode

Version: 4.4.58

Date: 30/10/2017

Blanket Release Close mode is implemented. The control actions available for releases (header) are Close, Finally Close, Freeze, Unfreeze and Close for Receiving. At the shipment level, the control actions available are Close, Finally Close and Close for Receiving.

Header Information		Shipments														
Header Status	Ship Status	Header Message	PO Number	Release Number	Document Type	Status	Header Action	Header Closing Reason	Header Current Status	GL Closed Date	Ship Message	Line Number	Ship Number	Ship Action	Ship Closing Reason	Ship Current Status
Validated	Validated		6378	1	Blanket Release	Approved			Open			1	1	Close		Open
Validated	Validated		7481	1	Blanket Release	Approved	Close		Open			4	4	Finally Close		Open
Validated	Validated		7481	2	Blanket Release	Approved	Finally Close		Open			5	5	Close for Receiving		Open

1.14. Added Supplier Number Column

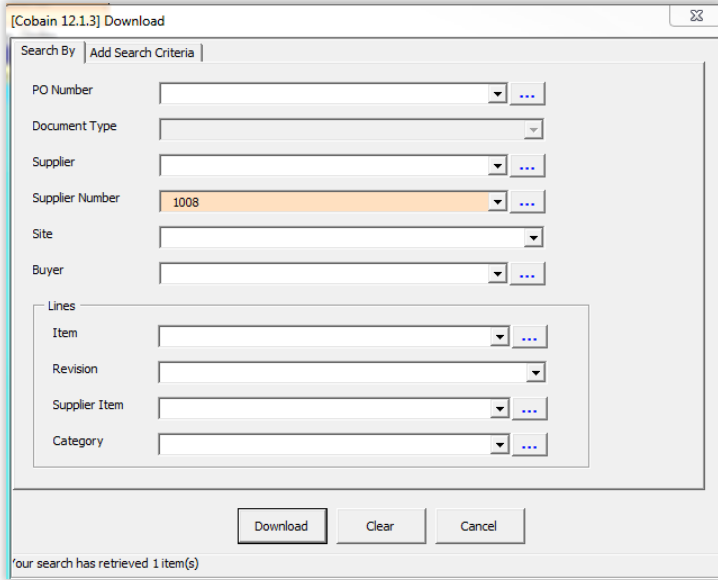
Version: 4.4.42

Date: 11/09/2017

Added Supplier Number column in Standard Purchase Order and Blanket Purchase Agreement templates. When a Supplier name is selected or entered, the supplier number assigned to it will default in the Supplier Number field. Alternatively, a user can enter the Supplier Number which will derive the ID for upload. In this scenario, the supplier name will not default from the number.

Header Status	Header Attach Status	Lin	Pr	Sh	Dist	Header Message	Header ID	Approval Status	PO Number	Status	Supplier	Supplier Number	Site	Contact	Header Ship To	Bill To	Buyer	Description	GL Encumbered Date
Default Values																			
							2888		705	Approved	GE Capri	1001		DAN Caprice	V1- New York	V1- New York		Green, Mr. Terry	
							667		549	Approved	GE Capri	1001		DAN Caprice	V1- New York	V1- New York		Brown, Ms. Casey	
							607		546	Approved	GE Capri	1001		DAN Caprice	V1- New York	V1- New York		Brown, Ms. Casey	
							547		547	Approved	GE Capri	1001		DAN Caprice	V1- New York	V1- New York		Brown, Ms. Casey	
							202325		7377	Approved	GE Capri	1001		DANBURY	V1 Ship Site A	V1 Ship Site A		Garrett, Paul	
							202227		7315	Approved	GE Capri	1001		DANBURY	V10 Virginia	V10 Virginia		Stock, Ms. Pat	
							202208		7298	Approved	GE Capri	1001		DANBURY	V10 Virginia	V10 Virginia		Stock, Ms. Pat	
							176928		6783	Approved	GE Capri	1001		DANBURY	V1- New York	V1- New York		Stock, Ms. Pat	
							170972		6712	Approved	GE Capri	1001		DANBURY	V1- New York	V1- New York		Stock, Ms. Pat	
							153929		6463	Approved	GE Capri	1001		DANBURY	V1- New York	V1- New York		Stock, Ms. Pat	
							137926		6325	Incomplete	GE Capri	1001		DANBURY	V1- New York	V1- New York		Stock, Ms. Pat	
							131916		6225	Approved	GE Capri	1001		DANBURY	V1- New York	V1- New York		Stock, Ms. Pat	

This field is available in the search criteria for the Download functionality.




1.15. Added Price Type Column

Version: 4.4.31

Date: 10/08/2017

Added a new column, Price Type in the Blanket Purchase Agreement template. This field consists of lookup codes. Oracle provides lookup codes of Cost Plus Fee, Cost Plus Percentage, Fixed, Indexed and Variable.

	A	B	C	D	E	F	BP	BQ	BR	BS	BT	BU	BV	BW	BX	BY	BZ	CJ	CK	CL
1																				
2																				
3																				
4																				
5	Batch ID		Request ID																	
6																				
7	Blanket Purchase Agreement																			
8	Results					Line Information														
9	Header Status	Head	Line	Line	Break	St	Line Mess	Line ID	Line Acti	Line Nu	Line Type	Item	Line Description	Revision	Category	UOM	Price	List Price	Market Pr	Price Type
10	Default Values																			
11																				
12																				
13																				