Agenda

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

Find Transactions

Consolidated Bill Number Low
Transaction Numbers
Sales Order Number

Transaction Number Low
- - -

Ship To
Name
Number
Taxpayer ID

PO Numbers
Document Number
Reference Numbers
Transaction Dates
GL Dates
Batches
Sources

Bill To

Transaction Types
Class
Primary Salesperson
Credited Transaction
Complete
Period
Currency

Clear
New
Find
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.
R12 Customer Form

All web based forms
R11i Customer Form

Standard Forms
R12 forms have three distinct regions: customer, account, and site.
11i regions combined the Customer/Account into one region and Site information as second 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 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
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.

<table>
<thead>
<tr>
<th>Account Site Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Name</td>
</tr>
</tbody>
</table>

**Account Site Address**

- Site Number: 5729
- **Country**: United States
- **Address Line 1**: Interlibrary Loan
- **Address Line 2**: 2330 N Kenmore
- City: Chicago
- County: Cook
- State: IL
- **Postal Code**: 60614
- **Address1**: 123 Main St

**Account Site Details**

- **Operating Unit**: Caltech
- **Category**: Territory
- **Translation**: EII Location

**Status**: Active

**Reference**: 5729

**Context Value**: Yes
Once a business purpose has been designated, then the business purpose region is accessed to add additional detail for that business purpose.
Users can search for existing customers by entering data into any of the fields below. After selecting ‘GO’, the results are displayed.
From the main search page, select the ‘Create’ button.
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.
Enter the Account site address information. All items with an asterisk * are required fields.

### Account Site Address

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Country</td>
<td>United States</td>
</tr>
<tr>
<td>* Address Line</td>
<td>125 S Clark Street</td>
</tr>
<tr>
<td>Address Line 2</td>
<td></td>
</tr>
<tr>
<td>Address Line 3</td>
<td></td>
</tr>
<tr>
<td>Address Line 4</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Chicago</td>
</tr>
<tr>
<td>County</td>
<td>Cook</td>
</tr>
<tr>
<td>State</td>
<td>IL</td>
</tr>
<tr>
<td>Postal Code</td>
<td>60603</td>
</tr>
<tr>
<td>Address Description</td>
<td>Identifying Address</td>
</tr>
<tr>
<td>Geography Code Override</td>
<td></td>
</tr>
</tbody>
</table>

### Account Site Details

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<td>Operating Unit</td>
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<tr>
<td>Territory</td>
<td></td>
</tr>
<tr>
<td>Translation</td>
<td></td>
</tr>
<tr>
<td>EDI Location</td>
<td></td>
</tr>
</tbody>
</table>

IMSS - Information Management System and Services
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.
Select add another row to enter the ‘ship-to’ site purpose and location name, then select the ‘apply’ button below. \textbf{Note:} the location field is required.
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.
From the communication tab in the customer account, select the create customer contact button.
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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.
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In 11i, you could inactivate a customer from Oracle Receivables.

![Customer inactivation screen from Oracle Receivables](image)
In 12, you will inactivate a customer from a TCA web form. The new navigation path is displayed below.
In 12, you will inactivate a customer from a TCA web form. The menu item is added to Oracle Receivables.
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
Q&A