	Summary of	MFG Test Use Case	s
Case #	Scenario	Pass/Fail	Notes
	DESIGN TO BUILD		
D2B01	Design to Build: Create New Inventory Item	Not Tested	
D2B02	Design to Build: Inventory Adjustment	Not Tested	
D2B03	Design to Build: Transfer Inventory via Transfer Order	Not Tested	
D2B04	Design to Build: Transfer Inventory	Not Tested	
D2B05	Design to Build: Item Costing	Not Tested	
D2B06	Design to Build: Build Assembly or Sub-Assembly	Not Tested	
	RECORD TO REPORT		
R2R01	Record to Report: Validate Subsidiaries & Segments	Not Tested	
R2R02	Record to Report: Accounting Setup	Not Tested	
R2R03	Record to Report: Validate Period Close	Not Tested	
R2R04	Record to Report: Exchange Rates	Not Tested	
R2R05	Record to Report: Journal Entry	Not Tested	
R2R06	Record to Report: Budgets	Not Tested	
R2R07	Record to Report: Reconcile Credit Card & Bank Statements	Not Tested	
	LEAD TO QUOTE		
L2Q01	Lead to Quote: Create and Manage Lead, Opportunity, Quote	Not Tested	
L2Q02	Lead to Quote: Create Online Lead	Not Tested	
L2Q03	Lead to Quote: Establish Quota	Not Tested	
L2Q04	Lead to Quote: Manage Forecasts	Not Tested	
L2Q05	Lead to Quote: Analyze Performance	Not Tested	
	ORDER TO CASH		
O2C01	Order to Cash: Create Sales Order, Fulfill, Invoice	Not Tested	
O2C02	Order to Cash: Customer Deposit	Not Tested	
R2C01	Order to Cash: Customer Return - Credit	Not Tested	
R2C02	Order to Cash: Customer Reurn - Replace	Not Tested	
	PROCURE TO PAY		
P2P01	Procure to Pay: Create Vendor	Not Tested	
P2P03	Procure to Pay: Demand Planning	Not Tested	
P2P04	Procure to Pay: Vendor Prepayment	Not Tested	
P2P05	Procure to Pay: Create Purchase Order	Not Tested	
P2P06	Procure to Pay: Purchase Order from Order Items	Not Tested	
P2P08	Procure to Pay: 3-Way Match	Not Tested	
P2P09	Procure to Pay: Vendor Return with Fulfillment	Not Tested	
	MANUFACTURING		
MFG01	Mfg: Create Work Order	Not Tested	
MFG03	Mfg: Report Production Completion	Not Tested	
MFG04	Mfg: Work Order Close	Not Tested	
MFG05	Mfg: Contract Manufacturing	Not Tested	

Case #	Scenario	Role	Step#	Step Name	Step Instructions	Verification
					Mfg: Create Work Order	
on:	Manually create a work order for p	roduction				
		Production	Step 1	Create Work Order	NOTE: prior to creating a work order validate the components have quantity	1. Work order is successfully Saved, can be
		Manager			on hand or do an inventory adjustment.	found and updated.
					Navigate to Transactions > Manufacturing > Enter Work Orders.	Open the work order and validate the items on the Items subtab.
					2. Select or enter the following information as it pertains to your business	
MFG01	Create Work Order				scenario:	3. Print the BOM and validate the quantities
WII GOT	Cleate Work Order				- Select subsidiary - Select assembly (or sub-assy if building to stock)	required for each component and sub-assy (if
					- Select assembly (or sub-assy if building to stock) - Enter quantity to build/assy	any) are valid.
					- Set work order to released	4. Navigate to the Operations subtab and
					- Set work order to released	validate each operation is correct including
					3. Click Save.	estimated hours.
					S. Glick Saver	esamatea noaisi
					Mfg: Report Production Comple	tion
on:	Report quantity completions at th	e operations				
		Production Operation	Step 1	Enter Completion from Work Order	Locate the work order (most recent or enter in global search).	1. Work order is found.
					2. Click Enter Completion button.	Completion form opens successfully, entry of data is successful and saved.
					3. Navigate to the Operation Completion section.	
						3. Validate GL Impact has moved labor, setup
					4. Select/Enter:	and overhead costs into the proper WIP
					- Select Operation from the Starting Operation field	account.
					- Select Operation from the Ending Operation field	
					- Enter a partial quantity completed at these operations (more quantity	
					completions to be recorded in Step 2.)	
					- press the TAB key	
					5. Review the operations subtab and note the operations that can be edited	
					and the calculated times. Update times if applicable to reflect actual.	
					The second secon	
					6. Click Save.	
MFG03	Report Quantity Completions					

		Production Operation	Step 2	Enter Completion from Operation Tasks	1. Navigate to Transactions > Manufacturing > Manufacturing Operation Tasks. 2. Locate the Work Order operation tasks from a list, click View on the operation, and click Enter Completion button. 3. Select/Enter: - Select Operation from the Starting Operation field - Select Operation from the Ending Operation field - Enter a quantity completed at these operations - press the TAB key 5. Review the operations subtab and note the operations that can be edited and the calculated times. Update times if applicable to reflect actual.	Work order and operations are found. Completion form opens successfully, entry of data is successful and saved. Walidate GL Impact has moved labor, setup and overhead costs into the proper WIP account.
					6. Click Save.	
					Mfg: Work Order Close	
on:	Close Work Orders to finalize accou		•			
		Production Manager	Step 1	Close Work Order	 Locate and view the Work Order. Click the Close button. Click Save. 	Work order is found, viewed, and Close successfully saves. Validate the Components subtab information.
MFG04	Purchase Order from Order Items					Validate the Routing Items subtab information. Validate the GL Impact. Validate Work Order status is Closed.
					Mfg: Contract Manufacture	
on:	Contract Manufacturing (Turnkey o		1	I		
		Production	Step 1	Turnkey Process	1. Does Contract Manufacturer (CM) provide all materials and labor? Follow	
		Manager Production Manager	Step 2	Tolling: Create Work Order	P2P processes to provide purchase order for contract. 1. Navigate to Transactions > Manufacturing > Enter Work Orders. 2. Select or enter the following information as it pertains to your business scenario: - Select subsidiary - Select assembly (or sub-assy if building to stock) - Enter quantity to build/assy - Set work order to released 3. Click Save.	1. Work order is successfully Saved, can be found and updated. 2. Open the work order and validate the items on the Items subtab. 3. Print the BOM and validate the quantities required for each component and sub-assy (if any) is valid. 4. Navigate to the Operations subtab and validate each operation is correct including estimated hours.

	Supply Chain	Step 3	Tolling: Release WO	1. Navigate to previously created work order. Note: components need to be	1. Validate work order is found and able to
	Manager			in the CM location.	edit.
				2. Edit Work Order and select status as Released.	2. Validate work order status is saved and
					now released.
				3. Click Save.	
	Production	Step 4	Tolling: Generate Tolling PO	Generate Tolling PO for Labor & Parts (a PO to match contract)	The Purchase Order form opens.
	Operator	Step 4	Toming. Generate rouning ro	denotate rouning to for Eason & Faris (a Fo to materi contract)	1. The Furchase Graci form opens.
	Орегатог			1. From the home Dashboard, click Purchase Order on the Navigation Portlet.	2. Transaction successfully saved and can be
				11. From the nome Dashboard, click Fulchase Order on the Navigation Fortiet.	found, and updated.
				2 Lakka hardana shira afaha aran Dandana Qudana aran sabanka aran isad	Touria, and apparted.
				2. In the header section of the new Purchase Order page enter the required	
				fields and information pertaining to your business. Select the CM as the	3. Purchase Order status is Pending Approval
				Vendor.	or Receipt. Note: if pending approval, have
					PO approved prior to moving to next step.
				3. On the Items tab, select an Item, Location, and enter Quantity. Click the	
				Add button on the line. Note: Ensure the location is the primary location that	
				will be stocked and shipped to the customer.	
				4. Click Save.	
Contract Manufacturing (Turnkey or					
Tolling)	Warehouse	Step 5	Tolling: Receive Tolling PO	1. From the home Dashboard, click on 'Orders to Receive' on the Reminders	Receive Orders page opens.
	Operations			portlet.	
					2. Item Receipt page opens.
				2. On the Receive Order page, locate the Purchase Order created in Step 1	
				and click Receive.	3. Transaction successfully saved and can be
					reviewed.
				3. On the Item Receipt page, review the Item, Quantity, and Location. Once	
				confirmed, click Save.	4. Verify GL impact.
					, , , , , , , , , , , , , , , , , , , ,
	Production	Step 6	Tolling: Complete WO	Locate the work order (most recent or enter in global search).	1. Work order is found.
	Operator		3 11 4 11 1	,	
				2. Click Enter Completion button.	2. Completion form opens successfully, entry
				21 olik Enter completion sattom	of data is successful and saved.
				3. Navigate to the Operation Completion section.	or data is successful and suvea.
				3. Navigute to the operation completion section.	3. Validate GL Impact has moved labor, setup
				4. Select/Enter:	and overhead costs into the proper WIP
					l ' '
				- Select Operation from the Starting Operation field	account.
				- Select Operation from the Ending Operation field	
				- Enter a partial quantity completed at these operations (more quantity	
				completions to be recorded in Step 2.)	
				- press the TAB key	
				5. Review the operations subtab and note the operations that can be edited	
				and the calculated times. Update times if applicable to reflect actual.	
				6. Click Save.	

MFG05

Production	Step 7	Tolling: Close WO	1. Locate and view the Work Order.	1. Work order is found, viewed, and Close
Manager				successfully saves.
			2. Click the Close button.	
				2. Validate the Components subtab
			3. Click Save.	information.
				3. Validate the Routing Items subtab
				information.
				4. Validate the GL Impact.
				4. Validate the GL Impact.
				5. Validate Work Order status is Closed.

Case #	Scenario	Role	Step#	Step Name	Step Instructions	Verification
					Design to Build: Create new Inventory Item	
on:	Manually create a new Inventory Ite		C+ 1	Constants	4 Constitution of Dankhard district and the latest Management Entries the No. Section Danke The New	4 New teast forms and a second of the second
		Supply Chain Manager	Step 1	Create Item	From the Home Dashboard, click on the Item Management link in the Navigation Portlet. The New Item page opens.	New item form opens successfully and allows entry.
					2. Click on Inventory Item to select the type of item.	Item successfully Saved, can be viewed and edited.
					3. Enter the following information:	
					- Item Name/Number (on page header)	*Note: all items must be created before
D2B01	Create new Inventory Item				- Display Name/Code (on page header)	attaching to assembly items for BOM.
					- Replenishment Method (on Inventory tab) - Transfer Ship Price (on Inventory tab)	
					- transfer Ship Price (of friveritory tab) - List Price - Qty 0 column (on Pricing tab)	
					- List Frice - Qty o column (off Fricing tab)	
					4. Record your entry details.	
					5. Click Save.	
					Design to Build: Inventory Adjustment	
on:	Manually adjust inventory.					
		Supply Chain Manager	Step 1	Adjust Inventory	 From the Home Dashboard, click on the Inventory Adjustment link in the Navigation Portlet. The New Item page opens. Inventory Adjustment page opens. 	Inventory adjustment form opens successfully.
					2. Enter required information.	Entries are entered successfully and transaction is saved.
					3. In the header section of the page, select an Adjustment Account (this is typically an expense	
D2B02	D2B02 Create Inventory Adjustment				account).	Validate item is adjusted with both cost and quantity.
					3. On the Adjustments tab select an Item, select a valid location, and enter	
					- Adjust Qty. By a number	4. View and validate impact on the GL. This
					- Unit Cost	may require viewing the transaction from the
					4. Click the Add button on the line.	item.
					5. Click Save.	
					Design to Build: Transfer Inventory - Transfer Or	der
on:	Enter Transfer Order, fulfill from so	urce and receive at	destination		200.8.1.0.24	
		Supply Chain Manager	Step 1	Enter Transfer Order	From the home Dashboard, click the Transfer Order link in the Navigation Portlet.	Transfer order form opens successfully.
					In the header section of the page, select the Source Location (use Location from D2B02) and Destination Location.	Transaction successfully Saved and can be viewed.
					3. On the Items tab select the Item used in D2B02 and enter Quantity to be transfered.	Transfer Order status is Pending Fulfillment.
					4. Click the Add button.	
					5. Click Save.	
		Warehouse Operations	Step 2	Fulfill Transfer Order	From the home Dashboard click Orders to Fulfill from the Reminders portlet.	Item Fulfillment form opens.
D2B03	Transfer Inventory - Transfer Order				2. On the Fulfill Orders page set Transaction Type to 'Transfer Order' and the Bulk Fulfill from Location to the Source Location from Step 1.	Able to find the transfer order created earlier.
					3. Click the Fulfill link for the Transfer Order created from Step 1.	Transaction successfully Saved.
					4. On the Item Fulfillment page, set Status = Shipped. Click Save.	

		Warehouse Operations	Step 3	Receive Transfer Order	From the home Dashboard click Orders to Receive from the Reminders portlet.	Item Receipt page opens.
		- F			2. On the Receive Orders page click the Receive link for the Transfer Order created from Step 1.	2. Transaction successfully Saved.
					4. On the I tem Receipt page, click Save.	3. Validate quantity and any costs transfer (negative "from location" and positive "to location").
					Design to Build: Inventory Transfer	
n:	Manually enter a single inventory	transfer.				
		Supply Chain Manager	Step 1	Enter Inventory Transfer	Navigate to Inventory > Inventory > Transfer Inventory . Inventory Transfer page opens.	Case successfully Saved.
					2. In the header section of the page select the From Location and To Location.	2. Item Quantity on Hand has been reduced by 1 at the From Location and increased by 1
D2B04	Inventory Transfer				3. On the I tems tab select the item used in D2B02 and enter Qty. To Transfer = 1.	at the To Location.
					4. Click the Add button on the line.	
					5. Click Save.	
					Design to Build: Item Costing	
n:	Update Inventory Item.					
		Supply Chain Manager	Step 1	Update Item Cost	 Utilizing any of the search features, find the items you will be using for Manufacturing testing. Or add items that will be needed for testing. 	New item form opens successfully and allows entry.
					2. Select the item to update or verify costing method.	Item successfully Saved, item can be viewed and edited with appropriate costing
					13. Costing choices are:	method applied.
					Costing choices are: Average	method applied.
D2D05	S.A.Maria Gratina					method applied.
D2B05	Set Item Costing				- Average	method applied.
D2B05	Set Item Costing				- Average - Standard	method applied.
D2B05	Set Item Costing				- Average - Standard - Specific - FIFO - LIFO	method applied.
D2B05	Set Item Costing				- Average - Standard - Specific - FIFO	method applied.
D2B05	Set I tem Costing				- Average - Standard - Specific - FIFO - LIFO	method applied.
D2B05	Set Item Costing				- Average - Standard - Specific - FIFO - LIFO - Mixed (combines two or more of above)	method applied.

		Engineer or	Step 1	Create Assembly or Sub-Assy	1. Navigate to Inventory > Items > New.	1. New item form opens successfully and
		Production				allows entry.
		Manager			2. Enter fields that pertain to your item (* asterik means required)	
					- Item Name/Number	2. Sub-assembly is successfully Saved, item
					- Description	can be viewed and edited; components are
					- Is item specific to subsidiary(ies) and/or locations?	attached to sub-assy.
					3. Select on Purchasing/Inventory sub tab	
					- Select costing method	
					- Review fields to determine what is applicable to your item	
					- If using WIP, check the WIP box for each location in the location chart	
D2B06	Create Assembly or Sub-Assembly				4. Select on the Components sub tab	
					- select on the components sub-table - select appropriate items for this sub-assy	
					- enter the quantity required for each sub-assy	
					cites the quantity required for each sub-assy	
					5. Select the Accounting sub tab	
					- Update the GL accounts as appropriate	
					- Select Tax Schedule (required)	
					Note: some fields become mandatory when choosing Standard cost.	
					6. Click Save.	
					U. Click Save.	

Define Work Calendar(s)

Design to Build: Define Work Calendar(s)

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Case #	Scenario	Role	Step#	Step Name	Step Instructions	Verification
					Procure to Pay: Create Vendor	
on:	Manually create vendor.					
P2P01	Supply Chain Step 1 Manager P2P01 Create Vendor		Step 1	Create Vendor	Navigate to the Shortcuts menu and click on Vendors (Vendors page opens). Click the New Vendor button. On the new Vendor page enter the mandatory fields in the header section and fields important to your business and this specific transaction. On the Address tab, click the pencil icon in the Edit column to open the new address window. Complete address fields and click the OK button to close the new Address window. Click the Add button on the line. 4. Click Save.	Vendor successfully Saved, can be found and updated.
	·				Procure to Pay: Demand Planning	
on:	Calculate estimated demand to driv	ve supply requirem	ents.			
P2P03	Demand Planning	Supply Chain Manager	Step 1	Calculate Demand	1. From the home Dashboard, click Item Demand Plan on the Navigation Portlet or from Transactions menu. 2. In the header section of the page select the following values (as an example only - adjust appropriately for your business): - Location: [location that stores physical inventory] - Projection Method: Moving Average - Projection Interval: Monthly - Projection Duration: 6 - Historical Analysis Duration: 12 3. Check the box next to one Item in the list. (NOTE: Only items using Time Phased replenishment method will appear in the list) 4. Click Submit. (If Demand Plans Already Exist window appears, then click Overwrite Current Quantities and Submit) 5. Click the View link for Item/Location to view the Demand Plan.	1. Item Demand Plans form opens. 2. The Item selected appears in the list for the Location selected. Last Modified Date is current date. 3. Demand Plan displays. (NOTE: Moving Average calculates demand based on historical sales. If the Item selected does not have any historical sales, then the values may be blank.)
PZPUS	vemand Planning	Supply Chain Manager	Step 2	Generate Supply Plan	1. From the home Dashboard, click Item Supply Plan on the Navigation Portlet or from Transaction menu. 2. In the header section of the page select the following values: - Uncheck Plan Through Distribution Network - Location: Select Location used in Step 1 - Start Date: Use current date - End Date: Current Date + 6 months 3. Check the box next to the Item used in Step 1. 4. Click Submit. 5. In the green Confirmation bar, click the Job Status Page link to view the status of the job. If the job is In Progress, then click the Refresh button until is is Complete. 6. To view the Supply Plan, navigate to Demand Planning > Run Demand Planning > Item Supply Plans and locate the Item/Location in the list. Click View next to the Item/Location.	Generate Item Supply Plan page opens. Item Supply Plans being processed. Supply Plan is caluclated.

			12	T		In the second second
		Controller	Step 1	Create Holding Account	Navigate to Setup > Accounting > Manage G/L > Chart of Accounts > New.	Chart of Accounts form opens successfully.
					2. Enter Other Current Asset in the type field.	2. Entry of the new account is successful.
					3. If using account numbers, enter a number in the number field.	3. Account is saved to the chart of accounts.
					4. Enter a name in the name field; for example Temporary Holding.	
					5. Click Save.	
		AP Analyst	Step 2	Write a Check	Navigate to Transactions > Bank > Write Checks.	1. Form opens successfully.
					2. Select Vendor in the payee field.	2. Entry of the prepayment is successful.
					3. Navigate to the Expenses subtab and in the Account column select the new account created above.	3. Transaction is saved.
					4. Enter the amount for the prepayment in the amount field.	
P2P04	Vendor Prepayment				5. Include any additional notes in the memo field.	
					6. Click Add.	
					7. Click Save.	
		AP Analyst	Step 3	Enter a Vendor Credit	1. Navigate to Transactions > Payables > Enter Vendor Credits.	Form opens successfully.
					2. Select the vendor used in the steps above.	2. Entry of the credit is successful.
					3. Navigate to the Expenses subtab and select the account number added in step 1.	3. Transaction is saved.
					4. Enter the prepayment amount in the amount column.	4. Validate the new account number created in Step 1 is cleared with a balance of zero.
					5. Click Add.	
					6. Click Save.	5. Validate credit on the vendors account.
					Note: When you receive the bill from the vendor, you can apply this credit.	6. Validate Impact on GL is accurate.

	Procure to Pay: Create Purchase Order Manually create stand alone purchase order, receive items, create vendor bill.							
on:								
		Supply Chain Manager	Step 1	Enter Purchase Order	From the home Dashboard, click Purchase Order on the Navigation Portlet.	1. The Purchase Order form opens.		
		Wanager			2. In the header section of the new Purchase Order page enter the required fields and information pertaining to your business.	Transaction successfully saved and can be found, and updated.		
						Purchase Order status is Pending Approval or Receipt. Note: if pending approval, have		
					Click Save. NOTE: the Purchase Order status may be Pending Approval or Pending Receipt depending on your configuration.	PO approved prior to moving to next step.		
		Warehouse Operations	Step 2	Receive Purchase Order	From the home Dashboard, click on 'Orders to Receive' on the Reminders portlet.	Receive Orders page opens.		
					2. On the Receive Order page, locate the Purchase Order created in Step 1 and click Receive.	2. Item Receipt page opens.		
					1 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Transaction successfully saved and can be reviewed.		
P2P05	Create Purchase Order					4. Verify GL impact.		

AP An	nalyst S	tep 3	Bill Purchase Order	1. From the home Dashboard, click on 'Purchase Orders to Bill' on the Reminders portlet. Bill Purchase Orders	1. Transaction successfully Saved
				page opens.	
					2. Bill status is Open.
				2. On the Bill Purchase Orders page, filter the list by selecting the Vendor used in Step 1. Then, click on the Date	
				link for the Purchase Order being billed. The Purchase Order from Step 1 opens in View mode. Click the Bill	
				button.	
				2 Parish the Pillinformation including Assessed Date Destina Desired and Towns Cityle Cours	
				3. Review the Bill information, including Amount, Date, Posting Period, and Terms. Click Save.	
AP An	nalyst S	tep 4	Pay Bill	1. From the home Dashboard, click on 'Bills to Pay' from the Reminders portlet.	Bill Payments page opens.
				2. On the Bill Payments page, locate the Bill created in Step 3 and click the Bill link to open the Bill in View mode.	2 Transaction successfully Saved
				Click the Make Payment button.	z. mansacaon saccessiany savec
				olor de mare rayment octoris	3. Vendor Bill status is Paid in Full.
				3. On the Bill Payment page, review the information in the header. Then, on the Apply tab verify that the Apply	
				box is checked for the Bill and click Save.	4. Verify the GL Impact.

	Procure to Pay: Purchase Order from Order Items							
on:	Create purchase order from Order Items page.							
		Supply Chain Manager	Step 1	Create Purchase Order	From the home Dashboard, click Order Items on the Navigation Portlet.	1. Order Items page opens.		
					On the Order I tems page, select the Location where the order will be received. In the item list below, check the box for the item you plan to order.	2. Processed Purchase Orders page appears.		
						3. Status is Complete, a Purchase Order		
					3. Click Submit.	Number is generataed, and Approval Status		
						is Pending Approval or Approved (depending		
					4. Click Refresh until the Status is Complete.	on your configuration).		
						Note: if pending approval - obtain PO		
						approval before moving to next step.		
		Warehouse Operations	Step 2	Receive Purchase Order	From the home Dashboard, click on 'Orders to Receive' on the Reminders portlet.	1. Receive Orders page opens.		
P2P06	Purchase Order from Order Items				2. On the Receive Order page, locate the Purchase Order created in Step 1 and click Receive. Item Receipt page opens.	2. Transaction successfully Saved.		
F2F00	Fulchase Order from Order Herris					3. Verify GL impact is accurate.		
			C. 0	200	3. On the Item Receipt page, review the Item, Quantity, and Location. Once confirmed, click Save.	4 8 1 8 1		
		AP Analyst	Step 3	Bill Purchase Order	From the home Dashboard, click on 'Purchase Orders to Bill' on the Reminders portlet.	Bill Purchase Orders page opens.		
					2. On the Bill Purchase Orders page, filter the list by selecting the Vendor used in Step 1. Then, click on the Date	2. Transaction successfully Saved.		
					link for the Purchase Order being billed. Click the Bill button.	3. Bill status is Open.		
					3. Review the Bill information, including Amount, Date, Posting Period, and Terms. Click Save.	5. biii status is Operi.		
						4. Verify GL impact is accurate.		
		AP Analyst	Step 4	Pay Bill	1. From the home Dashboard, click on 'Bills to Pay' from the Reminders portlet.	Bill Payments page opens.		
					On the Bill Payments page, locate the Bill created in Step 3 and click the Bill link to open the Bill in View mode. Click the Make Payment button.	2. Transaction successfully Saved.		
						3. Vendor Bill status is Paid in Full.		
					3. On the Bill Payment page, review the information in the header. Then, on the Apply tab verify that the Apply			
					box is checked for the Bill and click Save.	4. Verify the GL Impact is accurate.		

Procure to Pay: 3-Way Match									
Create purchase order and receive quantity that exceeds vendor tolerance.									
Item successfully Saved.									

i	1	Supply Chain	Step 2	Enter Purchase Order	1. From the home Dashboard, click Purchase Order on the Navigation Portlet.	Transaction successfully Saved.
		Manager	Step 2	Enter Purchase Order	1. From the nome Dashboard, click Purchase Order on the Navigation Portiet.	1. Transaction successfully Saved.
		ivialiagei			In the header section of the new Purchase Order page enter the following:	Purchase Order status is Pending Receipt.
					- Vendor Name: Use Vendor created in Case P2P03	2. Fulcilase Order status is Feriding Neceipt.
					- Location: Select location where items were received	
					Education. Select location where items were received	
					3. On the Items tab, select the Item from Step 1 and enter Quantity = 10. Click the Add button on the line.	
					4. Click Save.	
		Warehouse	Step 3	Receive Purchase Order	1. From the home Dashboard, click on 'Orders to Receive' on the Reminders portlet.	Receive Orders form opens.
		Operations				
					2. On the Receive Order page, locate the Purchase Order created in Step 1 and click Receive.	2. Item Receipt form opens.
					3. On the Item Receipt page, change the quantity to 15 (exceeds tolerances set in Step 1). Click Save.	Transaction successfully Saved.
						Verify GL impact is accurate.
		AP Analyst	Step 4	Bill Purchase Order	1. From the home Dashboard, click on 'Purchase Orders to Bill' on the Reminders portlet.	Bill Purchase Orders page opens.
					2. On the Bill Purchase Orders page, filter the list by selecting the Vendor used in Step 2. Then, click on the Date	2. New Bill page opens
P2P08	2 May Match				link for the Purchase Order being billed. The Purchase Order from Step 2 opens in View mode. Click the Bill	
P2PU8	3-Way Match				button.	Transaction successfully Saved.
					3. On the Bill page, review the Bill information, including Amount, Date, Posting Period, and Terms. Click Save.	4. Bill status is Pending Approval due to
					3. Of the bill page, review the bill information, including Amount, Date, rosting Period, and Perios. Click Save.	exceeded tolerances.
						exceeded tolerances.
						Billing Exception button appears.
						5. Simily Exception sucton appears:
						6. Verify GL impact is accurate.
		Contoller	Step 5	Approve Bill	1. From the home Dashboard, click on 'Bills to Approve' on the Reminders portlet.	Bills to Approve form opens.
					2. Click the date link next to the Bill created in Step 4. Bill opens in View mode.	2. Transaction successfully Saved.
					3. Click the Edit button, then change the Approval Status to Approved.	3. Bill status is Open. NOTE: Approval Status
						is Peding or Approved depending on your
					4. Click Save.	configuration. If approval is pending, it will
						be required before moving onto the next
						step.
						A Varific Chinana tia a samula
		AD Amphiet	Cton C	Dev. Dill	1. From the home Deckhoord slide on Dille to Deal from the Deminders norther	4. Verify GL impact is accurate.
		AP Analyst	Step 6	Pay Bill	1. From the home Dashboard, click on 'Bills to Pay' from the Reminders portlet.	1. Bill Payments form opens.
					2. On the Bill Payments page, locate the Bill created in Step 3 and click the Bill link to open the Bill in View mode.	2. Transaction successfully Saved
					Click the Make Payment button.	2. Hansaction successfully saved.
					click the make rayment button.	Vendor Bill status is Paid in Full.
					3. On the Bill Payment page, review the information in the header. Then, on the Apply tab verify that the Apply	5. Vender om status is i dia in i dii.
					box is checked for the Bill and click Save.	4. Verify GL impact is accurate.
				L.	The state of the s	. ,

	Return to Debit: Vendor Return with Fulfillment										
on:	Manually create a Vendor Return from a Vendor Bill.										
		Supply Chain	Step 1	Create Vendor Return Authorization	1. Locate a the Vendor Bill created in scenario P2P03 by entering the bill number into the Global Search and	Transaction successfully Saved.					
		Manager			clicking on the transaction. (This number was recorded in Step 3)						
						2. Screen returns to the Vendor Bill.					
					2. Click the Aurhoize Return button.						
					3. On the Vendor Return Authorization page, review the information and click Save.						

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		Warehouse	Step 2	Ship Vendor Return Authorization	1. From the Home Dashboard, click on Vendor Return Authorizations to Return on the Reminders portlet.	Ship Vendor Return Authorization form
		Operations				opens.
					2. Click on the Date link next to the Return created in Step 1.	
						2. Vendor Return Authorization opens in View
					3. Click the Return button. Item Fulfillment page opens.	mode.
					4. Review the Item Fulfillment information and click Save.	Transaction successfully Saved.
						4. Verify GL impact is accurate.
		AP Analyst	Step 3	Credit Vendor Return	1. From the Home Dashboard, click on Vendor Return Authorizations to Refund on the Reminders portlet.	Vendor Return Authorization form opens.
					Refund	
						2. Vendor Return Authorization opens in View
					2. Click on the Date link next to the Return created in Step 1.	mode.
					3. Click the Refund button. Bill Credit page opens.	Transaction successfully Saved.
					4. Review the Bill Credit information and click Save.	4. Verify GL impact is accurate.
		Controller	Step 4	Manage Vendor Refund: Deposit	Optional Step - This step should be used if Vendor provides a refund.	Deposit form opens.
P2P09	Vendor Return with Item Fulfillment		(Optional)			
					1. Navigate to Financial > Banking > Maked Deposits.	Transaction successfully Saved.
					2. In the header section of the page, enter the following:	Verify GL impact is accurate.
					- Account: Select a cash account to deposit the refund	
					- Memo: Refund for R2C01	
					3. On the Deposits tab, select the Other Deposits sublist and enter the following onto the first line:	
					- Name: Select Vendor used in the Vendor Return	
					- Amount: Enter the amount from the Vendor Credit (Step 3)	
					- Account: Select the Accounts Payable account from Step 3	
					- Payment Method: Check	
					- Number: Enter a fictional check number	
					4. Click Add on the line.	
					5. Click Save.	
		AP Analyst	Step 5	Manage Vendor Refund: Associate	Optional Step - This step should follow Step 4 only if Vendor provides a refund.	1. Transaction successfully Saved
			(Optional)	Credit to Deposit		
					1. Navigate to Vendors > Accounts Payable > Pay Single Vendor.	2. Bill Credit from Step 3 is applied.
					2. On the Bill Payment page, click the Apply check box next to the Bill Credit from Step 3 and Deposit from Step	3. Verify GL impact is accurate.
					3.	·
					3. Click Save.	
		AP Analyst		_	Optional Step - This step should follow Step 4 only if Vendor provides a refund. 1. Navigate to Vendors > Accounts Payable > Pay Single Vendor. 2. On the Bill Payment page, click the Apply check box next to the Bill Credit from Step 3 and Deposit from Step 3.	2. Bill Credit from Step 3 is applied.