

## 1) Search Page Configuration

- a. For the **External Manufacturing – Customer Sent PO Search Page** (Page Name = “Customer\_extManufacturingSentPurchaseOrder\_Search Page”)
  - i. Update the **page Subtitle** from “View all purchase orders.” to “View all External Manufacturing purchase orders.”
  - ii. **Hide the Delete (trash can) icon**
  - iii. **Add** the below two columns to the Search table. Position the new columns in between the existing Delivery Date and Last Modified columns
    1. Created By User
    2. Last Updated By User
  - iv. **Update** the name/literal for the existing column ‘Supplier’ to ‘Receiver’
  - v. Configure the **Filter panel** to:
    1. **Update** the name/literal of the panel title from “Filters” to “Purchase Order Filters”
    2. **Reorder** the existing filter fields to be in the below order:
      - a. Supplier
      - b. State
      - c. LastModified
    3. **Add** the ‘Created By User’ field as the fourth filter field
    4. **Update** the “LastModified” filter field name to “Last Modified Date”

## 2) View/Edit Page Configuration

- a. For the **External Manufacturing – Customer Sent PO View/Edit Page** (Page Name = “Customer\_extManufacturingSentPurchaseOrder”)
  - i. Configure fields within the ‘**Order Information**’ section
    1. Reposition the Action field from the second column to the first column under the Currency field
    2. Add the following fields to the bottom of the second column under the ‘Payment Terms By Percentage’ field
      - a. Transaction Id
      - b. Transaction Identifier Type
  - ii. Add a new Section and position it under the Order Information section
    1. Update the section name from “Section” to “Dates”
    2. Configure the section as a two (2) column section
    3. Define the ‘Default display state’ as “Expanded”
    4. Add the following fields to the first column
      - a. Creation Date/Time
      - b. Submitted Timestamp
    5. Add the following fields to the second column
      - a. Delivery Date
    6. Update the field name/literal from ‘Submitted Timestamp’ to ‘Submitted Date/Time’
  - iii. In the ‘Customer and Supplier’ section, ‘Customer’ group, hide the ‘Contact Fax Number’ field
  - iv. Move the following fields from the ‘Order Information’ section to the ‘Transaction Information’ section. Position at the bottom of the first column in the ‘Transaction Information’ section
    1. Transaction Id
    2. Transaction Identifier Type
  - v. **Line Items** Configuration
    1. Add the ‘Unit Price’ field as a column to table. Position between the ‘Net Price’ and ‘Delivery Date’ columns

2. Reorder the columns so that the '**Delivery Date**' column appears between the 'Item Code Value' and 'Quantity' columns
3. Remove '**Line Notes**' column from the table
4. Update name/literal of the existing '**Line**' column to '**Line Number**'
5. Configure the **View Purchase Order Item Details** panel
  - a. Update the section title from '**Item Information**' to '**PO Line Item Information**'
  - b. Reposition the 'Delivery Date' field to be after/below the 'Description' field
  - c. Add the 'Lot Number' field and position after/below the 'Description' field
  - d. Hide or Remove the 'Line Notes' field

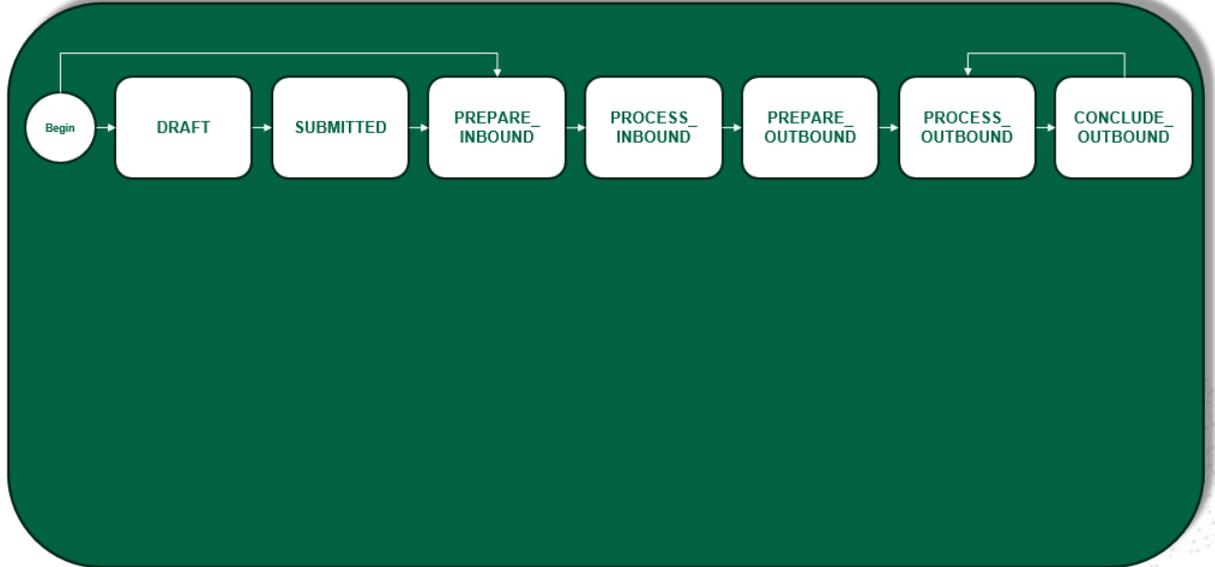
### 3) Page Rules Configuration ([Procedure Link](#))

- a. For the **External Manufacturing – Customer Sent PO View/Edit Page** (Page Name = "Customer\_extManufacturingSentPurchaseOrder")
  - i. Configure the **Page UI Rules** as defined below:
    1. **Not Editable** for the following conditions:
      - a. currentState equals "DRAFT" **OR**
      - b. currentState equals "SUBMIT"
  - ii. Apply the Page UI Rules to the following fields:
    1. Payment Terms by Day
    2. Payment Terms by Percentage

### 4) Workflow Configuration

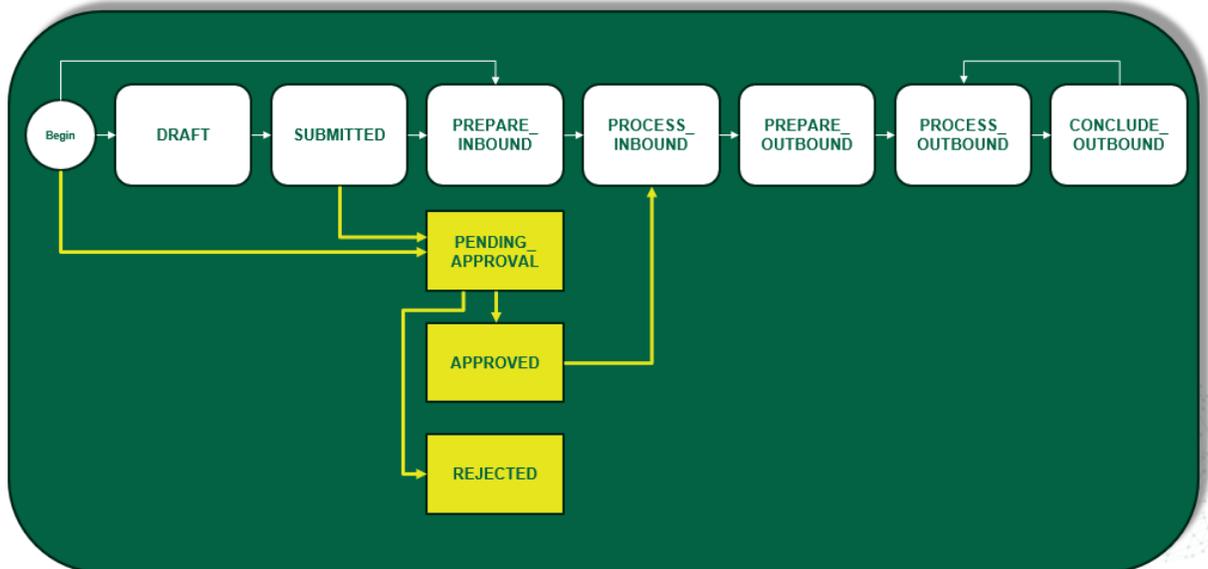
- a. For our "OSE Training Solution" solution, edit the workflow for the **External Manufacturing Sent Purchase Order** object
- b. Update the below current Standard workflow States and Transitions

## OSE Training Mar2025 – Workflow Standard Configuration



c. Add the below yellow Sub States and Sub State Transitions

## OSE Training Mar2025 – Workflow Company Configuration



### 5) Promote Solution from Validation to Production

a. Walk through the [procedure](#) as a group only as time permits ...