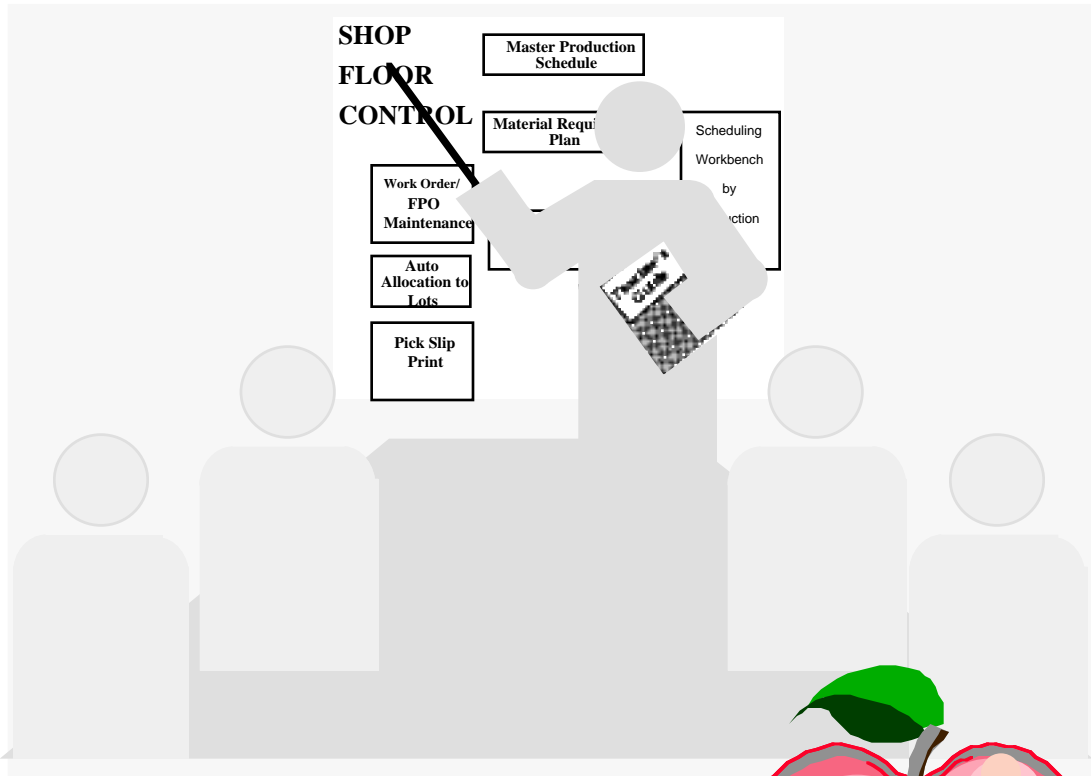


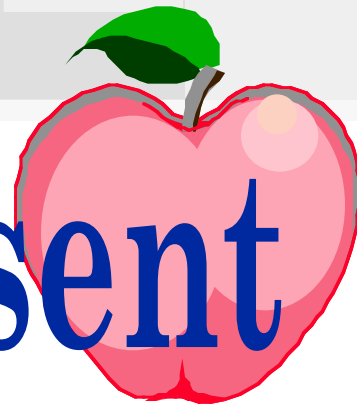
Order Entry Training

Version 8.4

RMS/Present



RMS/Present



Version 1.2
A Product of
MXB - Managing the Business
100 N. Freeman Road
Tucson, AZ 85748
(520) 886-5914
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Sample Agenda

Day 1

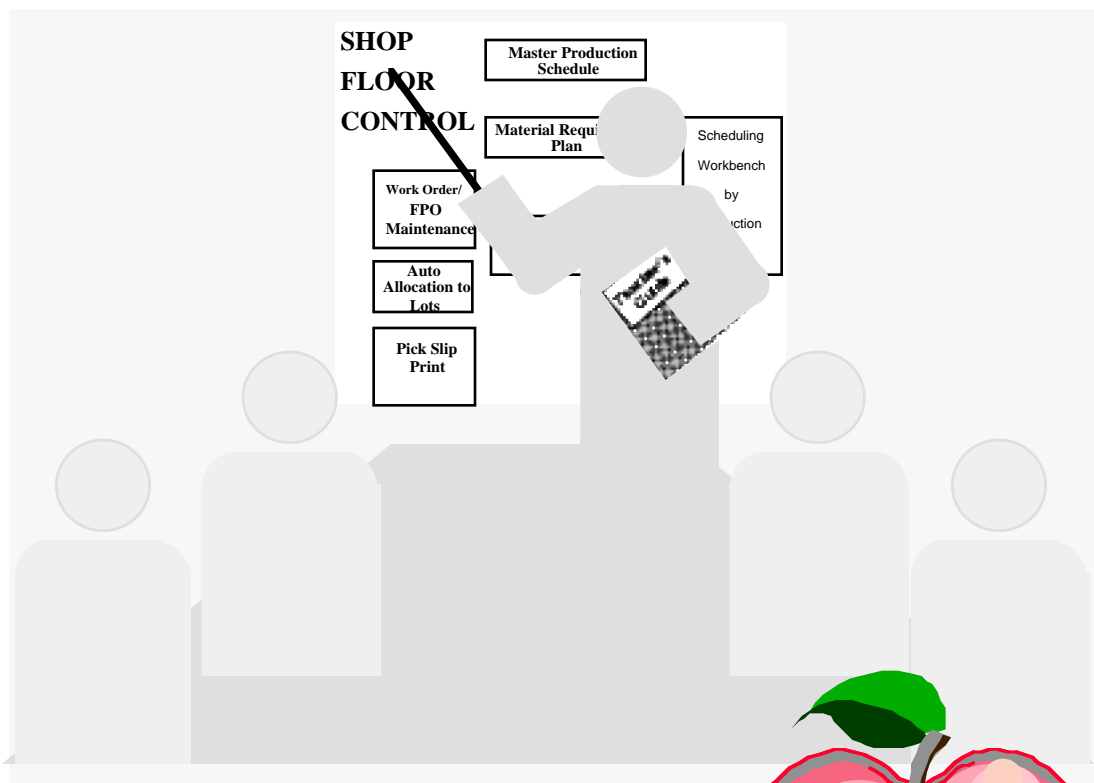
Morning

Customer Order Processing Overview
Order Processing Flow and Functions
Major Features
Order Type Maintenance
Template Orders
Order Entry Screen Flow

Afternoon

Order Entry Field by Field Review
Workshop

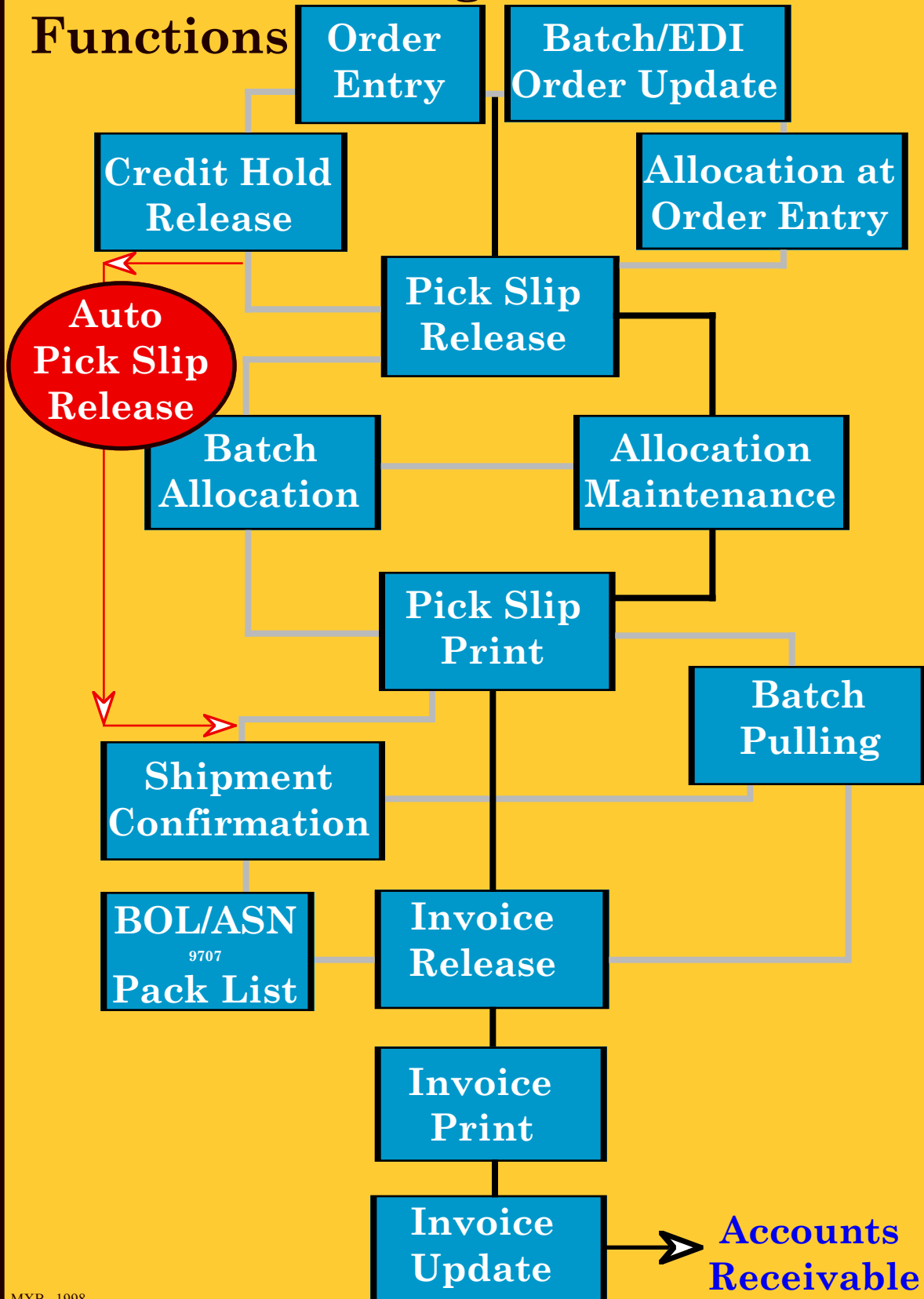
Customer Order Processing Overview



RMS/Present



Order Processing Flow and Functions



Major Features

ORDER AND QUOTE PROCESSING

FULL SCREEN INPUT

USER DEFINED ORDER TYPES

COPY ORDER FUNCTION

MULTIPLE LEVELS OF PRICING

Line, Full Order, and Promotion

CUSTOMER PRODUCT NUMBERS

CREDIT CHECKING

REGULAR, SAMPLE, BACKORDER, AND BLANKET ORDERS

MULTIPLE SHIP TO ADDRESSES

CUSTOMER SPECIFIC TEXT

MULTIPLE LINE ITEM TYPES

Regular, Non-Standard, Special Charge, Text

WAREHOUSE AT LINE ITEM LEVEL

FEATURES AND OPTIONS PROCESSING

USER DEFINED ERROR MESSAGES

Major Features

REASON CODE ORDER ACTIVITY TRACKING

CORPORATE CUSTOMER PROCESSING

KIT PROCESSING

SUPPLEMENTAL ORDER CONFIGURATIONS

BATCH ORDER ENTRY

AUTO PICK SLIP RELEASE

CUSTOMER FILL % AND FAIR SHARE ALLOCATION

GROSS MARGIN REPORTING

DISTRIBUTION AVAILABLE TO PROMISE

MULTIPLE UNITS OF MEASURE *8.3*

OUTBOUND EDI TRANSACTIONS *8.3*

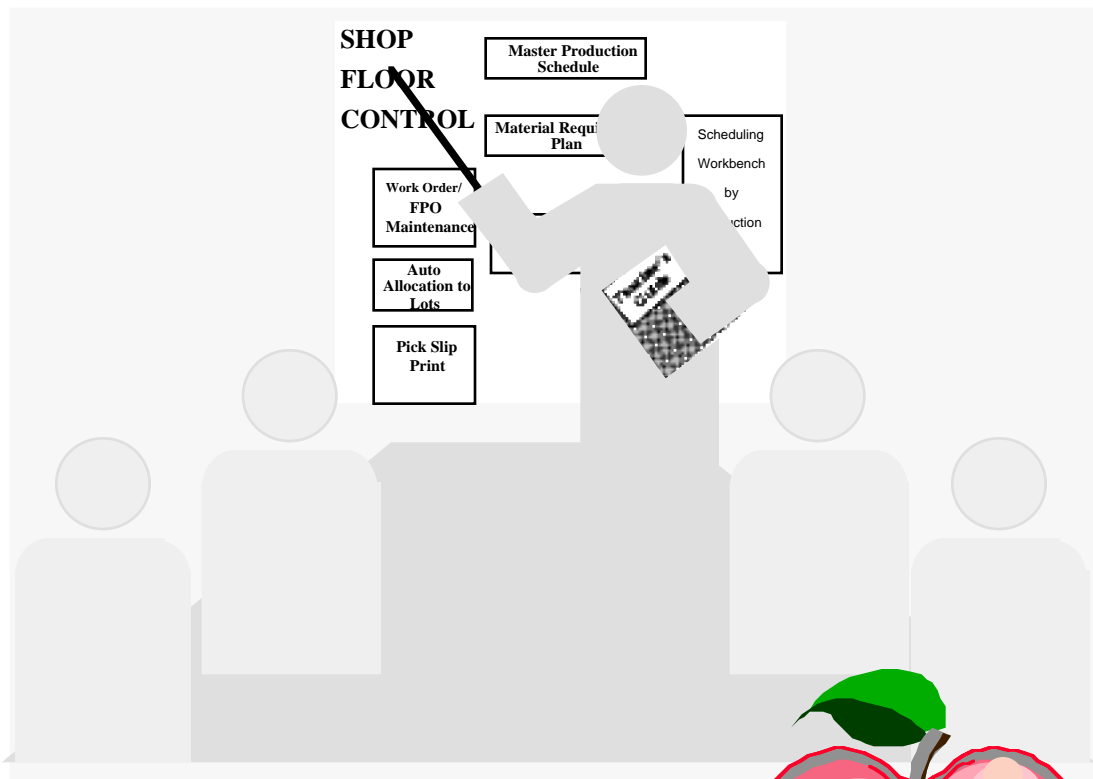
ADVANCED SHIPPING NOTICES^{*8.49707*}

TRADE ALLOWANCES *8.3*

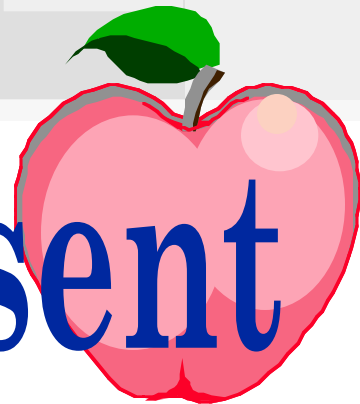
EXPORT DOCUMENTATION^{*8.4*}

SINGLE SCREEN ORDER INPUT^{*8.49707*}

Setting Up



RMS/Present



Master File Maintenance

CODE ID MAINTENANCE (MS0843) 8.3

UNIT OF MEASURE TABLE MAINTENANCE (MS0827)

SYSTEM CONTROL (WCMANT)

WAREHOUSE MASTER (MS0803)

SALESMAN MASTER (OB0812)

ORDER TYPE MAINTENANCE (OB0809)

TERMS CODE MASTER (OB0814)

TAX CODE MASTER (MS0816)

REASON CODE MASTER (OB0813)

CUSTOMER MASTER (MS0836)

SHIP TO MASTER (OB0801)

PRODUCT MASTER (MS0825)

ERROR FILE MAINTENANCE (OB0816)

CUSTOMER PRODUCT NUMBERS (OB0817)

EDI CONTROL FILE MAINTENANCE (MS0829)

Master File Maintenance

KIT STRUCTURE MAINTENANCE (OB0655)

SUPPLEMENTAL ORDER MAINTENANCE (OB0600)

SUPERSEDE/SUBSTITUTE MAINTENANCE (OB0630)

CUSTOMER/ORDER/LINE TEXT (OB0811)

DATA QUEUE MAINTENANCE (OB0819)

SHOPPING LIST REBUILD (OB0605)

PACK TYPE MAINTENANCE (OB0850)^{8.49707}

Order Type Maintenance

(OB0809)

An Order Type determines the Functionality, Input and Transactional Process of Customer Orders

**A CUSTOMER HAS A DEFAULT ORDER TYPE WHICH
MAY BE SHARED BY MANY CUSTOMERS**

**ORDER TYPES CAN BE OVERRIDDEN AT ORDER
ENTRY TIME**

**ORDER TYPES MAY BE CHANGED DURING THE LIFE OF
AN ORDER**

Change from on hold to process or from Quote to Order, etc.

Setting Up

Order Type Maintenance (cont.)

(OB0809)

**DETERMINES THE FUNCTIONALITY OF THE ORDER
USING A SPECIFIC ORDER TYPE AT A SPECIFIC TIME**

What to do during order entry

DETERMINES THE PICK AND SHIP PROCESS

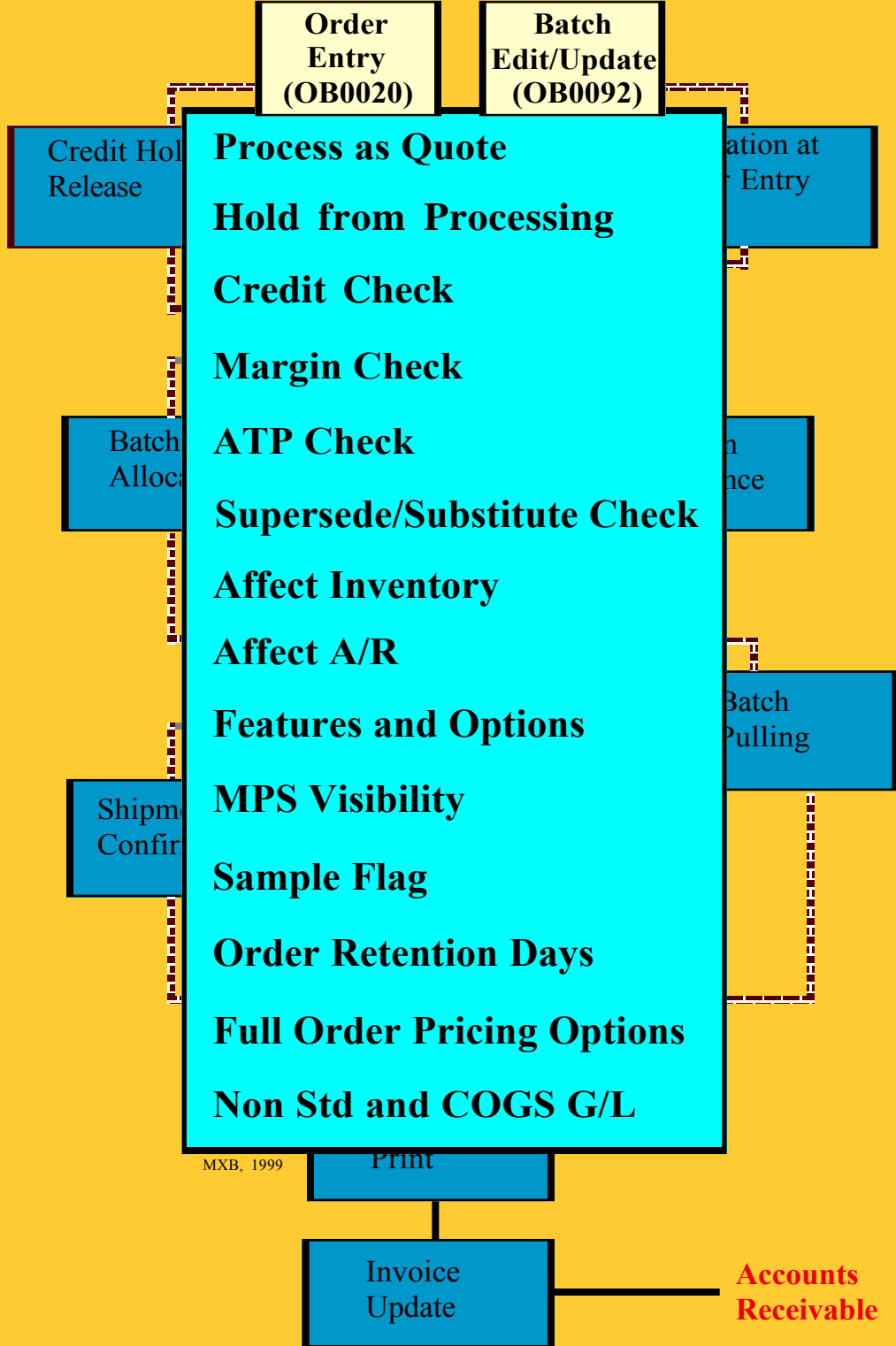
What steps are done and how are they controlled

DETERMINES INPUT FIELDS FOR ORDER ENTRY

What can be entered and overridden

Order Types

Order Function Criteria



MXB, 1999

Order Type Maintenance (cont.)

(OB0809)

Process as Quote

CAN BE CREDIT CHECKED

HAS ITS OWN QUOTE NUMBER

CAN BE CONVERTED TO ORDER

DOES NOT UPDATE OPEN ORDER AMOUNT

IF "Y"

Hold from Processing = Y

Affect Inventory = N

Affect A/R = N

MPS Visibility = N

Allocate in Order Entry = N

Order Type Maintenance (cont.)

(OB0809)

Hold From Processing

Creates a 00 Status Customer Order

Can be Credit Checked

Increments On Order Dollar Amounts in Customer Master

Does not update on Order Quantity in Product or warehouse files

IF "Y"

Affect Inventory = N

Affect A/R = N

MPS Visibility = N

Credit Check

Performed at Order Entry

Order must be released from Credit Hold to proceed

Based on Last Payment Date and Credit Dollars

Shipment Confirmation or Invoice Release must be used

Margin Check

Checks manually entered price against base cost compared to margin range specified in product master

Gives Message if over/under

Order Type Maintenance (cont.)

(OB0809)

ATP Check

Makes available "special" ATP as Action Code "AD" in OB0020

IGNORES ANY MANUFACTURING DATA

TIME HORIZON FIXED AT 14 DAYS

IF "Y"

Inventory Installed in System Control = Y

Allocate in Order Entry **(OB0020)** = Y

Supersede/Substitute Check

Makes action code SS available in OB0020

OB0020 GIVES MESSAGE THAT A SUB OR SUPER EXISTS IF INVENTORY OF ORDERED PRODUCT IS NOT AVAILABLE

Affect Inventory

IF "N"

On order quantities in product and warehouse not updated

Allocations not performed

MPS Visibility must be N

Order Type Maintenance (cont.)

(OB0809)

Affect Accounts Receivable

IF "N"

Invoice is not created at Invoice Update

Features and Options

Allows entry and configuration of models

MPS Visibility

IF "Y"

Will not be included as customer demand in MPS
Generation

Sample Flag

Assumes all products on order are samples

All prices default to zero

G/I number comes from system control

Order Type Maintenance (cont.)

(OB0809)

Order Retention Days

Number of days that completed orders will be retained on system

Full Order Pricing

Determines if orders with this order type are eligible for full order pricing

CAN BE OVERRIDDEN AT THE ORDER

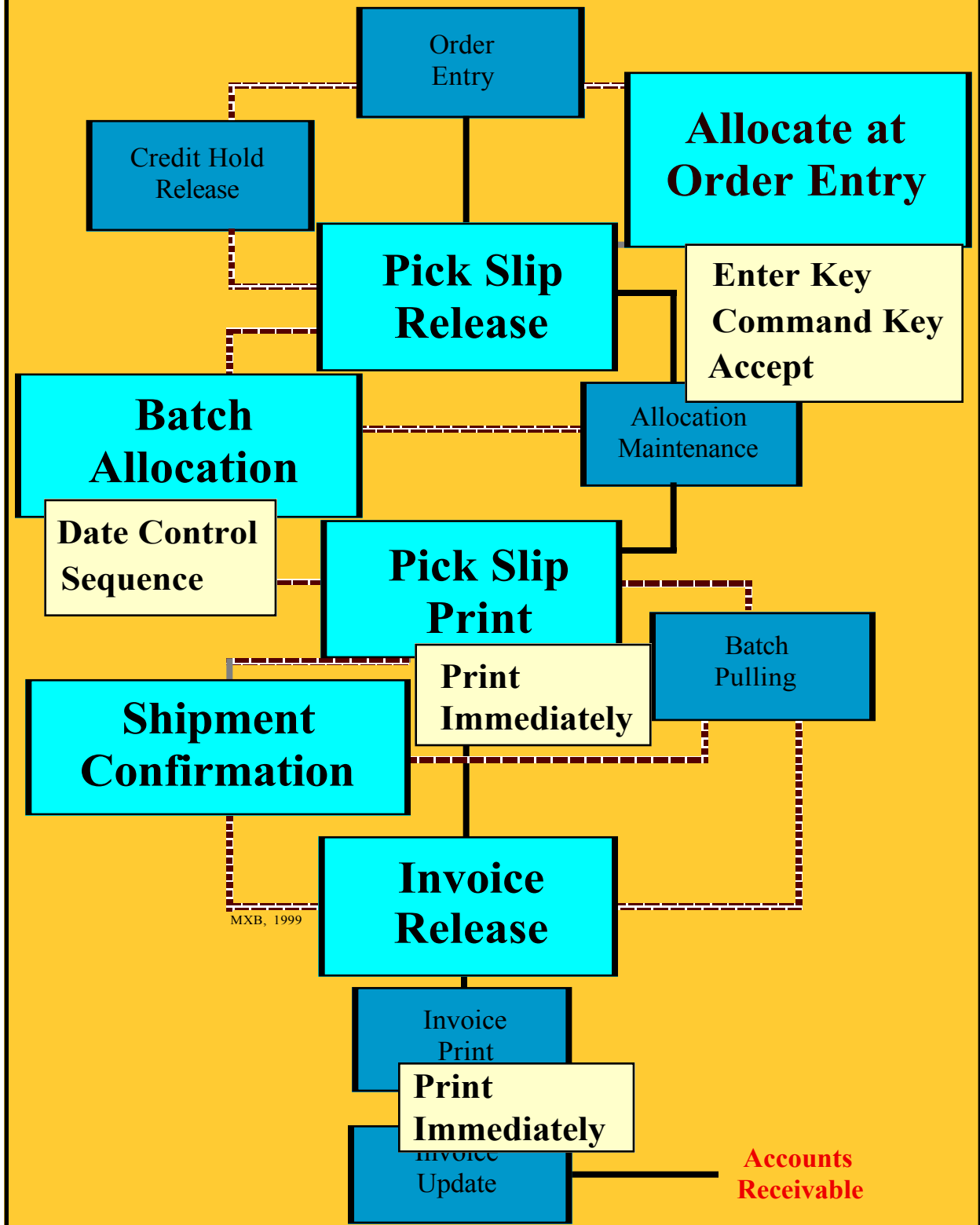
IF "Y", PRICING WILL BE DONE WHEN

- (1) Order is accepted *or*
- (2) Upon invoking a function key *or*
- (N) By a batch job submitted separately

General Ledger numbers

Non-Standard Sales and Regular Cost of Goods Sold account to override standard hierarchy

Order Types Order Process Criteria



Order Type Maintenance (cont.)

(OB0809)

Allocate in Order Entry

*Determines if and when allocations are performed in **OB0020***

IF ALLOCATIONS ARE DONE AT ORDER ENTRY, WILL BE DONE WHEN

- (1) Accepting Order *or*
- (2) Using a function key *or*
- (3) Using "enter"
- (N) Do not allocate at Order Entry

Allocation Based On Date

Which order header date is used to select lines for allocation

CHOICE OF REQUESTED, SCHEDULED, OR ORDER DATE

Allocation Sequence for Backorders

Are Back Orders or Regular Orders allocated first

Order Type Allocation Sequence Code

Allocation Priority For all orders using this order type

BLANK IS HIGHEST PRIORITY

Order Type Maintenance (cont.)

(OB0809)

Print Acknowledgment

Optional step that makes all orders with this type eligible to print acknowledgments

Pick Slip Release Required

If "No", increments status of order to Pick Slip Released without invoking that function

Pick Slip Print Required

Increments status of order to Pick Slip Printed without printing the pick slip

Print Pick Slip Immediately

Uses Data Queue to print pick "In Background"

IF "Y"

Pick Slip Release Required = N

Pick Slip Print Required = Y

Shipment Confirmation Required

IF "Y"

Shipment Confirmation is used to relieve inventory

IF "N"

Invoice Release performs shipping functions

Order Type Maintenance (cont.)

(OB0809)

Print Invoice Immediately

Uses Data Queue to Print Invoices "in Background"

Automatically Ships Product From Inventory

QTY SHIPPED EQUALS

Qty Ordered if No Allocations

Qty Allocated if Allocated at Order Entry

IF "Y"

Pick Slip Release Required = N

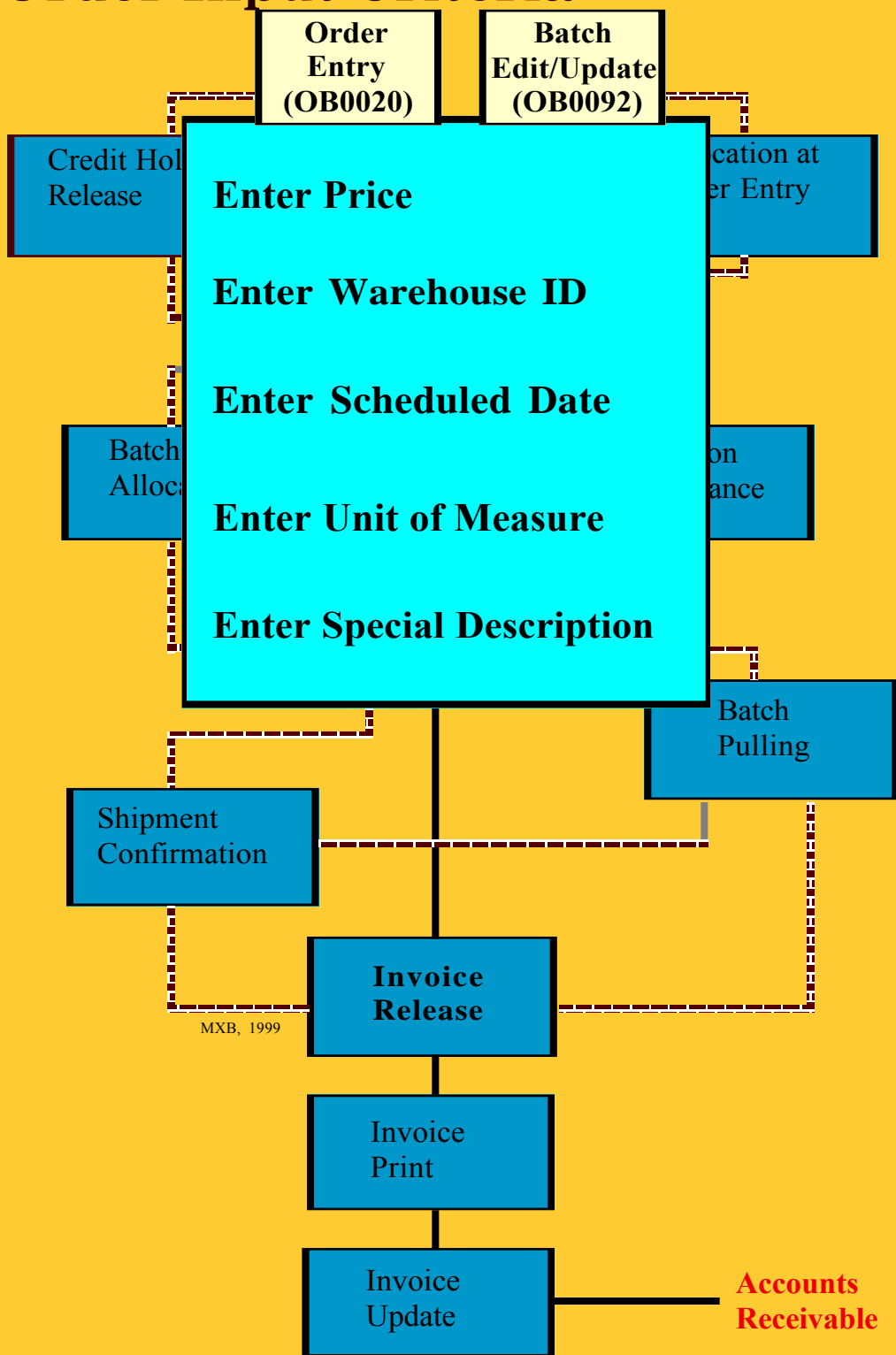
Pick Slip Print Required = N

Shipment Confirmation = N

Invoice Release Required = N

Order Types

Order Input Criteria



Order Type Maintenance (cont.)

(OB0809)

Allow Input at Order Entry for

PRICE (REGULAR LINE ITEM)

WAREHOUSE

SCHEDULED DATE

UNIT OF MEASURE (REGULAR LINE ITEMS)

SPECIAL DESCRIPTION (REGULAR LINE ITEMS)

Supplemental Order Maintenance

(OB0600)

Default Order Templates for Customer Order Entry **(OB0020)**

SHOPPING LIST

Order Entry lists the products this customer has ordered in the past based on parameters in Customer Master or System Control.

STANDING ORDERS

A list of products for a customer for a specific day of the week.

TEMPLATE ORDERS

A list of products associated with an ID which may be input to the customer order.

GLOBAL ORDERS

A list of products that appears with every order.

Input Fields

ORDER CATEGORY

L - Shopping List, T - Template, S - Standing, G - Global

IDENTIFICATION

Customer number or template ID

DAY OF THE WEEK

For Shopping Lists

PRODUCT

Supersede/Substitute Maintenance

(OB0630)

Defines acceptable product substitutions or replacements for Order Entry (OB0020)

TYPE

Substitutions

(I)ndependent - Interchangeable

(D)ependent - One way substitution

(S)upersede

Succession chain replacement

PRODUCT

EFFECTIVE DATE

Compared to the Order Date for Supersede

Setting Up

Shopping List Rebuild

(OB0605)

Generates list of items included in the Customer Shopping List

USES PARAMETERS FROM CUSTOMER MASTER

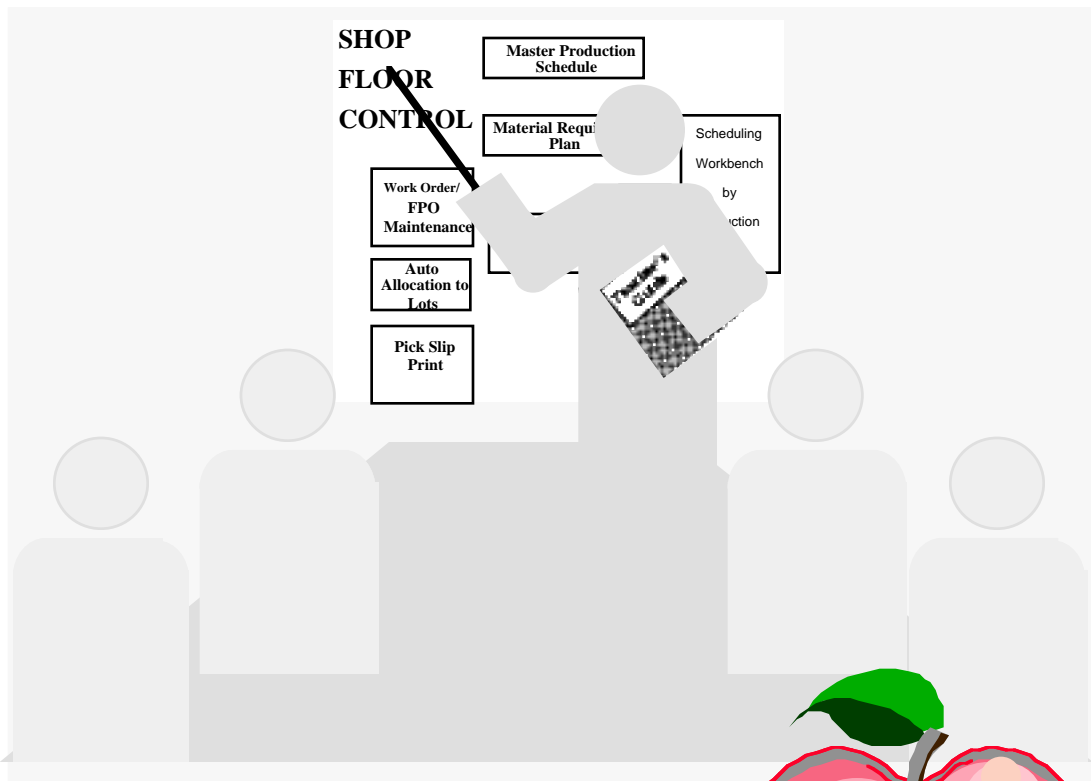
Shopping List Flag = Y

Number of Past Sales Periods

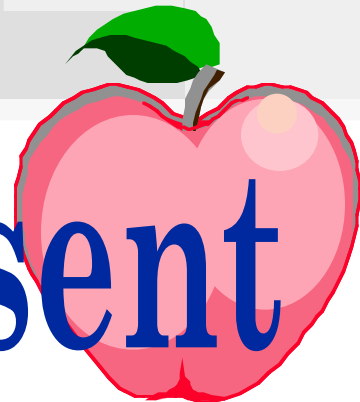
Number of Items

RETAINS ITEMS MANUALLY ENTERED ON LISTS

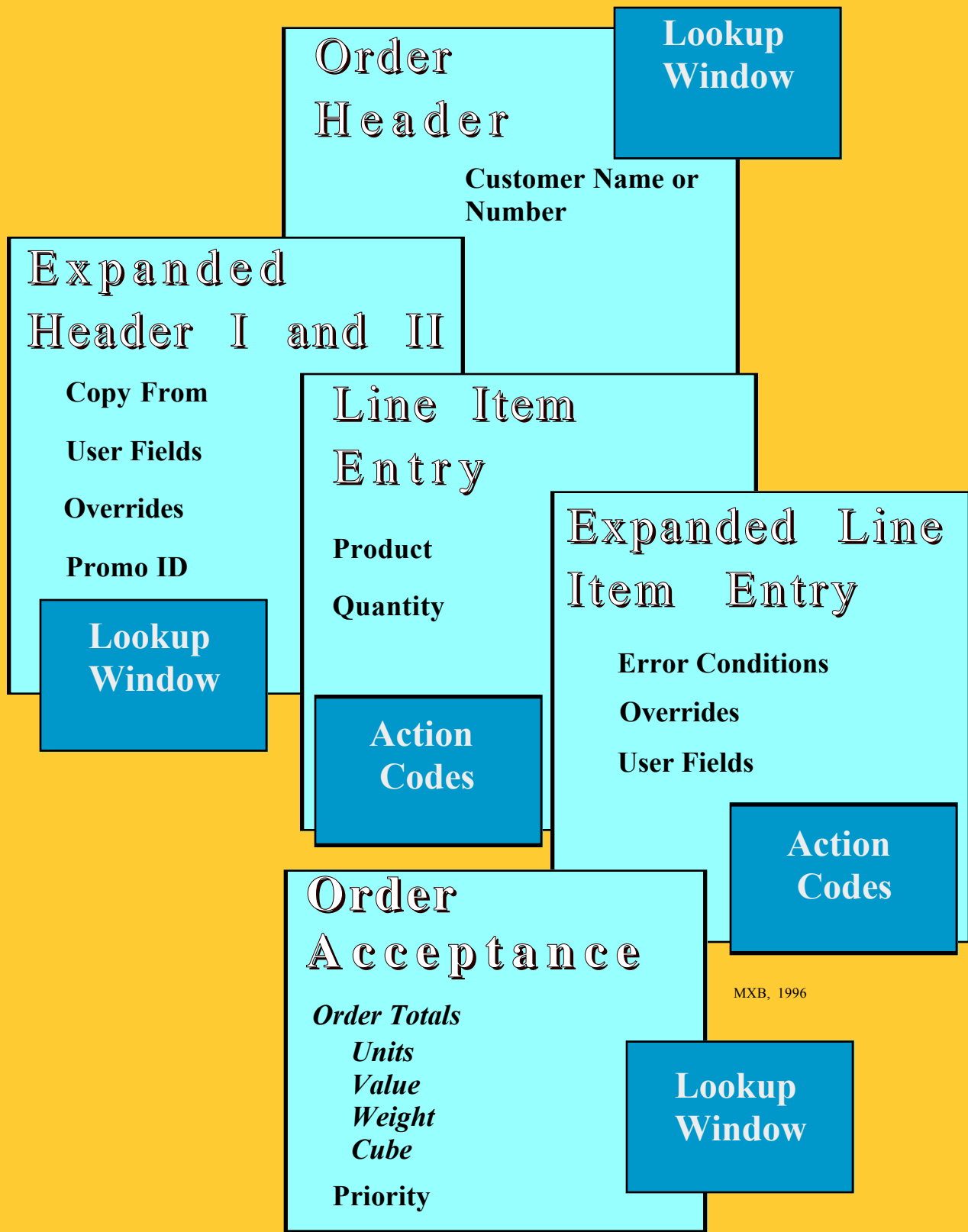
Order Entry



RMS/Present



Order Entry Screen Flow



Order Entry Screen Flow

(OB0020 - Header)

ORDER/QUOTE NUMBER

For maintaining existing orders.

CUSTOMER NUMBER/NAME

The customer number or name may be input. If the name, a lookup will be performed.

SHIP TO NUMBER

REQUEST/EFFECTIVE DATE

For Order/Quote, all line items in the order will default to this date.

SCHEDULE/EXPIRATION DATE

For Order/Quote, all line items in the order will default to this date.

CUSTOMER P.O. NUMBER

SHIP TO P.O. NUMBER

ORDER TYPE

Order type conversions are allowed if no shipments have been made and other considerations.

REASON CODE

SUPPLEMENTAL ORDER

Y - Customer Shopping List, N - Standing Order, I - Ignore

Order Entry Screen Flow (cont.)

(OB0020 - Expanded Header I)

Input Fields in addition to Header

COPY FROM

Copies line item detail. O - Copy Order, Q - Copy Quote, T - Copy Template

ORGANIZATION CODE 1 AND 2

BLANKET ORDER

FULL ORDER PRICE FLAG

Designates if this order will be selected for full order pricing.

REPRICE ORDER FLAG

Forces repricing of order.

ORDER PROMO

LINE PROMO

CURRENCY CODE

EXCHANGE RATE

USER DEFINED FIELDS 1 THRU 6

SALESMAN

WAREHOUSE

Order Entry Screen Flow (cont.)

(OB0020 - Expanded Header II)

Input Fields in addition to Header and Expanded Header I

SHIP TO

CUSTOMER TAXABLE FLAGS

CUSTOMER TAX RATE CODES

CUSTOMER TAX LICENSE NUMBERS

Order Entry Screen Flow (cont.)

(OB0020 - Line Item Entry)

Line Item Entry

PRODUCT

QUANTITY

UNIT PRICE

LINE TYPE

*R - Regular, N - Non Standard, T - Text, S - Special Charge, K - Kit,
C - Component, B - Bundle*

ACTION CODE

*Execute command and lookups. Use Function key to review
available options.*

REASON CODE

*Default Reason Code for adding, canceling, or maintaining order.
May be overridden. Order Audit Trail Data Queue must be used.*

ERRORS/WARNINGS

*A count of the number of messages and the short description of the
first message.*

(A)LLOCATIONS/(P)RICING

*Indicator of whether either of the actions have been performed on
this order line.*

Action Codes

CODE	PURPOSE	CODE	PURPOSE
AD	DISTRIBUTION ATP	PP	PROMO PRICING
AP	MFG AVAIL. TO PROMISE	RC	REASON CODES
CI	CONTRACT PRICE INQ.	S	SDQ MAINTENANCE ^{8.49707}
CP	CUSTOMER PRODUCTS	SC	SEARCH:PRODUCT CLASS
CT	CATALOG TEMPLATE	SD	SEARCH:DESCRIPTION
D	DELETE LINE	SK	SELECT KITS/COMPONENTS
E	EXPANDED DETAIL	SL	SUPERCEDE LOOKUP
EC	EDI COMPANION FILE ^{8.49707}	SN	SEARCH:SYNONYM
F	ENTER F&O DETAIL	SS	SUPERSEDES/SUBSTITUTES
GM	GROSS MARGIN INQ.	T	ENTER TEXT FOR LINE
IR	ITEM REQUIREMENTS	TA	TRADE ALLOWANCE
M	MODELS IN INVENTORY	TC	TAX CODE LOOKUP
MA	MANUAL ALLOCATIONS	TF	F&O PROCESS TEXT
OO	OPEN ORDERS	TH	TA HIERARCHY
PC	PRODUCT CLASS LOOKUP	TI	TA IMPACT
PI	PRODUCT INQUIRY	W	WAREHOUSE LOOKUP
PL	PRODUCT MASTER LOOKUP	WO	WORK ORDER INQUIRY

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