Order Entry II

# Objective:

After finishing this course, user should understand how to use Order Search filters to view and open previously processed orders by parameters offered in Order Manager. User should understand search features are useful to find orders by customer request and/or to update expired ship dates keyed by user. User will be able to edit an order to update information as needed, including ship dates. And, have a basic understanding of the importance of ship dates relating to material pulls, allocation, and inventory levels.

Will also extend knowledge of message lines as they relate to adding additional charges as needed. User should gain an understanding of macro messages. User will begin to learn how to obtain freight estimates from the various freight distributors used by Louisville Tile. User will learn how to enter a basic order for customer that needs material shipped from a Louisville Tile location to a 3rd party address. User will understand how to update the ship to address and leave with an understanding of the available header options menu within sales orders.

## Pre-Reading:

* Change Ship to Address
* Freight Estimates (UPS Oz link)
* LTD Ship from Branch Process
* Waitlist Legend

## Lesson Plan – Order Search & Edit

* Review Various methods to search orders
	+ Filters and displays available in Order Search
	+ Search for open and expired ship dates
* Edit Order Review
	+ Update ship date and notepad

## Lesson Plan – Order Entry II

* Review order entry LTD ship from Branch
	+ Discuss material unable to ship from branch (Schluter profiles)
	+ Review Available Header Options menu, changing ship to address
* Review ship via types and how to update
* Add material to ticket
* Review freight estimate using UPS Ozlink
	+ Finding weight of product (by line) on order to use for freight estimate
	+ Adding 20% coverage to estimate
	+ Discuss handling charges associated with shipping from branch
* Review macro messages
	+ Add freight & handling charges to ticket using Macro messages
* Credit Hold review: How to recognize a credit hold on billed account, and how to contact Accounts Receivables to release sales order.
	+ Review on material previously sent: Customer profiles
	+ Show how to set up chat in Teams to A/R team for release of sales order from credit hold.
	+ Waitlist Explanation: Orders on credit hold, or Cash/COD orders with balance due cannot be entered on to Waitlist until Credit Hold is cleared or balance due has been paid.
* Check for Incoming Material: Review how to look up ETAs for incoming material
	+ Backorder goods
	+ Special Order goods
	+ Backorder goods with special order statuses

# Follow-Up Reading:

* Check for Incoming Material
* Customer Profiles
* Order Search Filters