Order Entry I

# Objective:

After finishing this class user should understand how to key a basic order, from the Order Manager menu, and/or from shortcuts within the Navigator program. User will be able to identify system behaviors related to stocked material allocation, and ordering material in from vendor. Student should be able to use shipping calculator in tandem with order entry to identify material ETA’s as well as identify potential additional charges (depending on vendor). User will gain the basic understanding of order elements, including the order header, order status codes, and use of message lines for general communication to customer, supplier, or warehouse. User will also gain basic understanding of customer profiles and how it relates to payment and order policies.

## Pre-Reading:

* Customer Profiles
* Order Headers WWWWH/Elements
* Bill Of Material
* Basic Order Entry Process

# Lesson Plan – Basic Order Entry I:

* Enter Order Manager application from Navigator Menu
* Begin New Customer (basic) Order
  + Search for customer account or name in database.
  + Determine if customer has account # or will be entered as a cash sale.
  + Identify correct account # for cash/retail sales
* Complete header & identify order header elements
  + Identify ship via based on customer default.
  + Identify payment policy by customer profile
  + Understand the role of branch & warehouse
  + Ability to add customer to order notifications
* Add material to ticket
  + Search for material needed
  + Identify unit of measure
  + Identify ISO allocation, special order, back-order characteristics
  + Identify price per unit & extended price
* Determine ship date on order by customer expectation for partial material, or by ultimate ETA for all material.
  + Determine material ETA and unique vendor policies using shipping calculator
  + Identify material currently in stock
* Message lines: Review how to add basic message lines to orders
  + Under line items
  + From Header
* Process order & understand end of order options steps and options.
  + Print Preview and distribution
* Understand use of Notepad in Available Options for team communication
* Show the Add Task feature in Available Options for customer follow-up.
* Use shortcut widgets to enter orders outside of order manager application
  + Customer information widget
    - Enter basic order
    - Enter quote
  + Quick quoter application

## Follow-up Reading

* Create Retail Customer
* Available Options
* Message Lines
* Available Header Options