



# ADVANCED ORDER ENTRY INTRODUCTION

WORLDWIDE BUSINESS SOLUTIONS

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Advanced Order Entry is an extension of Sales Order Processing. You can use Advanced Order Entry to enter and amend orders, then process those orders through to invoicing within Sales Order Processing. When you use Advanced Order Entry, the normal Sales Order Processing enquiries and reports are automatically extended to display additional information, such as allocation to Inventory batches, or back to back sales and purchase orders, and so on.

If you choose to use Advanced Order Entry to source a sales requirement outside of the Inventory stockroom, then you can reserve stock against purchase orders set up in Purchase Management, or create requisitions for both purchase to order and direct delivery orders. If you also use Manufacturing or Configurator, or both, then you can also choose to create production orders for made to order and configure to order requests.

Before you can start to use Advanced Order Entry, there are a number of software prerequisites:

- Accounts Receivable.
- Inventory Management.
- Sales Order Processing.
- Purchase Management.
- Requisitioning.

You need to set up some reference data for Advanced Order Entry within these different areas, for example:

### INVENTORY MANAGEMENT

You use the Inventory Management company profile to activate Advanced Order Entry. You can use the company profile to determine the way that you want to use Advanced Order Entry, for example, whether you want to display margins and so on, and how you want to control stock allocation. Once you have activated Advanced Order Entry there are three areas where it impacts upon Inventory Management:

- **Descriptions File:** You need to create a number of extra codes within the descriptions file, for example, you need to create codes to cater for quotation types and Certificates Of Conformance, and so on.



ADVANCED ORDER ENTRY IS AN EXTENSION OF SALES ORDER PROCESSING. YOU CAN USE ADVANCED ORDER ENTRY TO ENTER AND AMEND ORDERS, THEN PROCESS THOSE ORDERS THROUGH TO INVOICING WITHIN SALES ORDER PROCESSING.

- **Item Maintenance:** You need to identify search family codes for each item that you sell; where appropriate you can attach Certificate of Conformance codes, identify the preferred supplier, the non-stock item type (if appropriate) and also the default order type.
- **Enquiries:** During enquiries, the order status information is updated to include details of stock reserved against a purchase order, and so on.

### SALES ORDER PROCESSING

Once you have activated Advanced Order Entry, Sales Order Processing is affected across three areas:

- **Maintenance:** You need to complete additional information on the Sales Order Processing company profile. You also need to set up a default customer within Accounts Receivable, and then maintain the details of that customer within customer maintenance in Sales Order Processing. This default customer is used if you want to create ad-hoc quotations for potential customers.
- **Processing:** If you use Advanced Order Entry, then you cannot create an order using conversational order entry, or amend an order created using transcriptional order entry. When you process a manual allocation, then you can choose to process batches of orders, which could be useful for allocating stock to orders created using transcriptional order entry.
- **Enquiries:** Most enquiries will display order line type information, for example, RS for a line that is reserved against a purchase order, and so on. You can display batch allocation details, reservation details and, where appropriate, the Purchase Order enquiry to view the purchase order that the line is reserved against.

### PURCHASE MANAGEMENT

Advanced Order Entry impacts across two areas within Purchase Management:

- **Processing:** Any back to back orders created in Advanced Order Entry will generate a requisition. You can amend those requisitions and choose to convert those requisitions into purchase orders using the normal process. During goods receiving, you can choose to view reservation details where appropriate.
- **Enquiries:** You can also select an order line to display any reservation details from all enquiries.



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