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Create eCommerce Fulfillment Orders

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Create eCommerce Fulfillment Orders

This is an alternate application for importing web orders instead of using the eCommerce Server. This application requires more manual interaction by an operator to complete the processing of fulfillment orders.

To begin the process the operator must log into ProfitMaker or ProfitMakerPlus and select the Fulfillment Transactions, eCommerce and Create eCommerce Fulfillment Orders.

When selecting "Create eCommerce Fulfillment Orders" the following window will display two options: **Import** and/or **Run**.

Import

This option is used to update the in-process files from an ASCII file.

Enter filename including drive and path

Enter the drive letter, directory and file name of the incoming ASCII file. A browse button is available for file selections.

Use program # from file

If the ASCII file contains the program number then this field must be checked. This allows one file to contain orders for multiple programs if unchecked you will be prompted for the Program # to be used during the import routine and this program # will be assigned to all orders. The date and time are also displayed of when the last import was performed.

Click Import.

After processing, a message will be displayed on your screen showing how many orders were imported and if any were rejected. The import process can be done several times during the day and will append to a set of temporary files. At this time, the Fulfillment orders have not been created.

Following the next procedure will create the Fulfillment orders/releases.

Run

This option is used to update the in-process files and create the actual fulfillment orders. The same type of exception checking is performed to make sure that the order may be created based on valid information.

Process by Program or Customer - All/Selected/Range

Gives the operator the choice to create the orders from the temporary file for a selected/range of program(s) or customer(s)

Export report

After previewing the Fulfillment Order Report, you will be prompted to export the report to the hard drive.

Operator

This will default the operator initials to the order.

Options

Allow operator controlled selections for this order creation run selection.

Print invoices for orders with credit card payment

This will be used to default in the Fulfillment Order billing code (SB or CS), which controls the creation of an invoice form. This question must be checked in order to create an invoice document.

Use customer master tax codes

Normally this must be checked unless a zip code table record(s) exist or the ASCII file contains a valid tax code.

Create customer master

If the ASCII file contained a customer number that does not exist as a customer master, clicking this box will create them as a new customer if the program master record contains a customer #. The bill to and ship to name, address, phone, fax and e-mail address will be created from the "B" and "S" records of the ASCII file. Other required fields will be updated from the customer master listed on the Program master.

When a new customer master is being created a partial list of the fields to be updated from the program master customer account include:
Salespeople, commission, contacts, credit limits, customer type, source, and sales tax codes. Information related to the address, phone and fax numbers will be updated from the "B" record in the ASCII file. An additional check related to the sales tax codes is performed based on the "zip code tables" and if a record is found the sales tax codes will be changed. Exempt accounts will need to be maintained manually after this process is complete.

In addition a new ship to code will be created based on the information found in the "S" record in the ASCII file.

Update backorder quantity for inventory shortages

Select this option to analyze current stock and back order quantities and if the resulting order quantity causes the available (onhand - allocation back orders) to be less than 0 the entire quantity will be placed on back order.

Create matrix line items

When the item is a matrix item with a valid matrix id the line items will be

created using the new matrix standards.

Selecting run will perform the import. A process bar window will be displayed and upon completion a dialog box will appear to indicate the number of order(s) created/rejected. A support journal will then be displayed to the screen and may be printed at this time.

Selecting "OK" will display a report of rejected orders and orders created during the import routine. If any orders are rejected, print this report and look for any error codes.

Note: *After closing the preview journal, you will be prompted to delete the rejected orders. If the ASCII file is going to be corrected and re-imported, delete the rejected orders. Selecting "No" to rejected orders indicates that the records will be corrected using the ASI tools program.*

At this point the Fulfillment Order is processed as normal.