

Overview of Order Entry

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Order Entry

Order Entry allows the input of customer orders, including drop ship and multiple vendor orders. The order creates the purchase order for the supplier, the acknowledgment to the customer, and the sales order that is carried forward for billing your customer. Orders for stock inventory may also be processed this way.

Order Entry Tips:

- Write down the order number assigned on the work order form. This will allow quick access to the order.
- The bill to address can be used for the shipping address or type in a Ship To Code that is already setup for that customer. Typing in -99 will use the Company Information address.
- Be sure to check salesperson number, commission percent, tax code, price, cost, per, reorder date, and vendor number.
- Use an item number on every line. Set standards for art charges, imprint, etc. Item Masters with a "DS" item type can also be setup so the description and product code default in.

Note: *If using "DS" item masters, any change in quantity ordered will default the price back to zero if the item master does not have pricing information setup.*

- Use NOPRINT as the item number to add a line that neither customer nor vendor will see. The cost of a NOPRINT line will reduce the gross profit on an

order and any commission paid on gross profit, but will not post to the general ledger.

- Start the description generically such as PEN rather than BLUE. Your order history and order reporting will be more accurate and easily accessed. Searching items by item description will also be easier.

- Use a PRODUCT CODE ON EVERY LINE. The same product code can be used for all related items such as wearables for the T-shirt and the art charge. Or, a separate product code can be used for all art charges.

Reprint Orders

Orders may be reprinted through the reprint order menu option or print on demand option. An order can be reprinted any time until it is billed. Changes may be made to an order before reprinting it.

Acknowledging Orders

When an acknowledgment is received from a vendor, it can be entered in the computer. Acknowledged orders will be noted by a "*" on the Open Order Reports. Acknowledgement of orders can be done in order entry or through the menu option in Order/Billing.

Order Followup Procedures

Acknowledge Orders

Orders can be acknowledged in Order Entry and through the menu option Acknowledge Orders. Acknowledged orders print an asterisk on the Open Order Report.

Track Open Orders

Use the Open Order Report to call vendors to confirm receipt of order, verify timely delivery, and so forth. The most efficient way to print the report for vendor follow up is to sort by vendor and select a range of ship dates. Select the fields that meet your company's needed information.

Record Notes On Orders

Record any conversations with the customer and vendor in order notes. By keeping a history of these conversations (which are time and date stamped at time of entry), everyone in the office will know what is the status of the order. These notes can also be printed on the open order report and are

saved to order history (based on a setting in Company Information).

Quotes

Quotes to customers may be entered and printed in the quotes program.

Accepted quotes may be turned into an order.