UC 105-Order Entry 3 Agenda

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Course Description

This course will cover Order Entry for glass companies.

Business Case

As a… Customer Service Representative in the Glass industry
I want to… enter and manage quotes and orders including those orders that contain glass orders with cutouts
So I can ….properly and efficiently process orders to get them sent to production and shipped to the customer on time.

Key Benefits

Easy to use and highly configurable. Advanced features in Order Entry allow industry specific CSR tasks to occur in a well-designed flexible manner.

Functional Walkthrough

1. Entering a piece of Glass
2. Alternate Wizards
   a. CAD
   b. Shower Designer
1. Paste Special
2. View Purchasing Requirements
3. Inventory Requirements
4. Order Relations
5. Transaction Log
6. Report History
7. Hold policies
8. System text
9. Conversations
10. Item Pullback

Tips

1. Select the ESC key to exit line item in process.
2. You can run two instances of CORE to multi-task.
3. Ensure the options are getting set for operations in CAD if pricing is not coming out as expected.
4. Order relations can let you know if the order was copied from another order.
5. Conversations will alert you to a new item when you log into CORE.
6. Conversations can be used to add notes to the order.
7. If an option changes without your knowledge, you can check the 'Transaction Log' to see who changed it and at what time.
8. Paste special can help to save time entering similar line items.