

Chapter 4.09: Supply Chain Orders

Introduction

The *Supply Chain Order* option allows product orders to be created on the desktop that will be processed or “picked” from the warehouse and expedited to a shipping carrier.

Overview

The Supply Chain Orders menu can be found under *Modules->Supply Chain Orders*.



Supply Chain Order Entry: This is the location where new orders are added to the system.

Packing Slips: This option allows you to print your “pick-lists” for existing orders.

Print Bill of Lading: Allows you to print the acknowledgement of receipt of goods for your shipper.

Confirm Supply Orders: This is the location where existing orders will be closed after they are processed.

Open Orders: This report allows you to view and print open and confirmed orders.

Supply Chain Setup: This section will be used to set up the Supply Chain Order system.

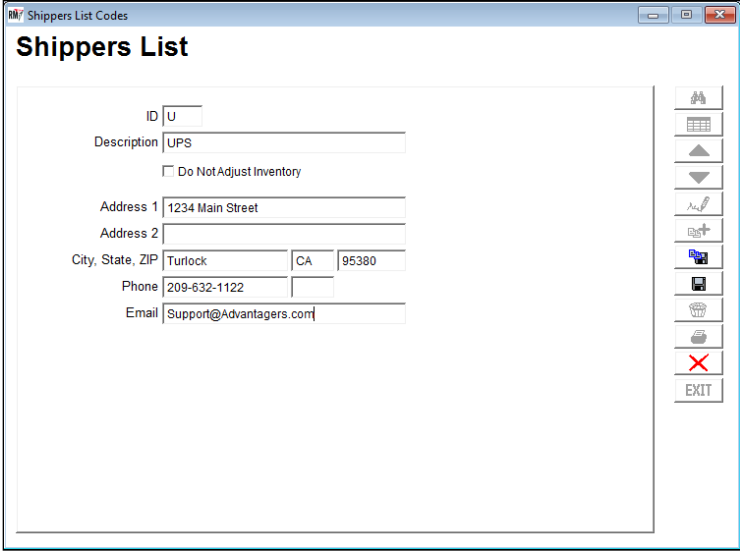
Desktop Setup

When new orders are processed, important shipper lists and order confirmation codes are required. These items can be added to the system by following the steps below.

Shipper List Codes

A complete list of “shippers” needs to be added to the program, any method of shipping that you use to process orders should be entered here.

Shipper List Codes can be found under *Lists>Product Codes > Shippers List Codes*.



Fields:

ID: The ID of the Shipper.

Description: The name or description of the Shipper.

Do Not Adjust Inventory: Select this option to not update the inventory values for products using this Shipper ID when confirming the supply chain order.

Address 1&2: The address of the Shipper.

City, State, Zip: The City, State, Zip of the Shipper.

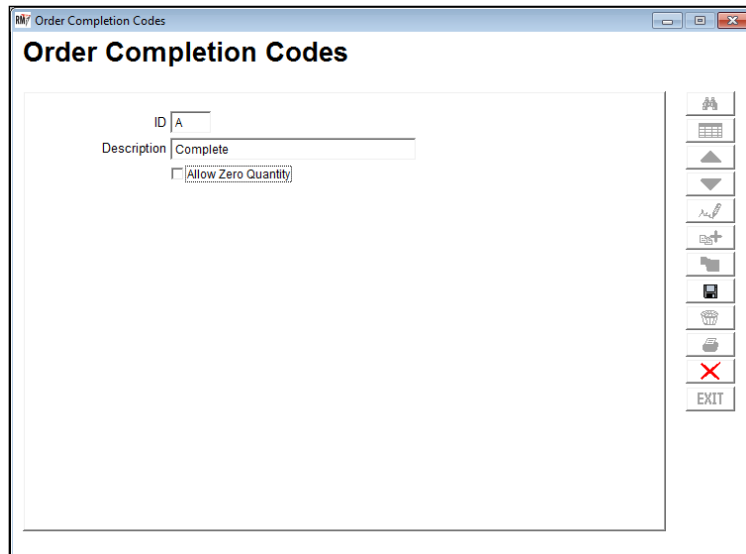
Phone: The contact number for the Shipper.

Email: The contact email for the Shipper.

Order Completion Codes

An *Order Completion Code* will be entered per item when an existing order is processed. Some examples of order completion codes are: completed, processed, back-ordered, or cancelled.

Order Completion Codes can be found under *Lists>Product Codes> Order Completion Codes*.



Fields:

ID: The ID of the code.

Description: The description of the code.

Allow Zero Quantity: Choose this option when a quantity is not required upon completion of the order.

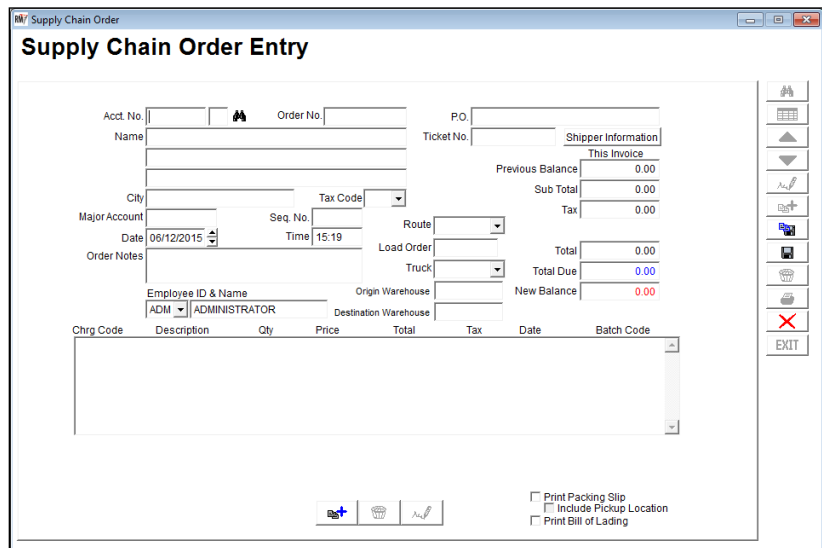
Daily Processing

Once you have created all of the set up items covered in the previous section, you can move on to daily processing.

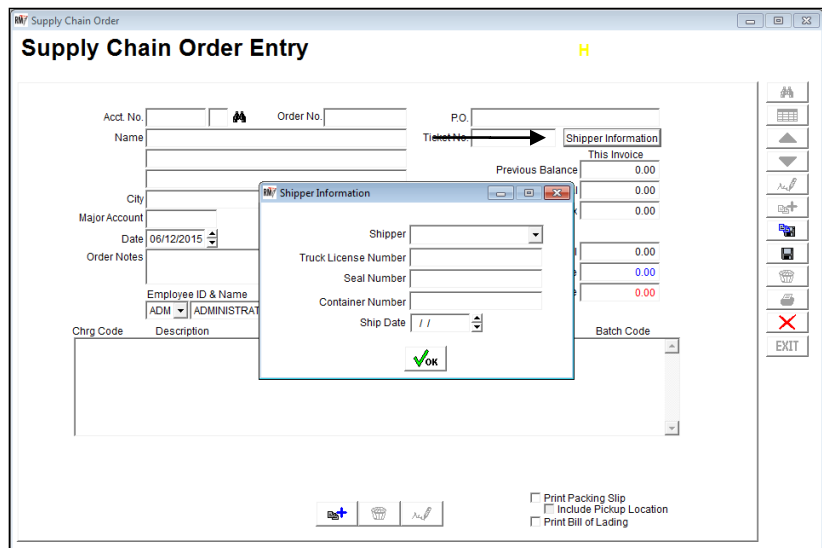
In this section, an example order will be used for processing an order via US Mail.

Creating a New Order

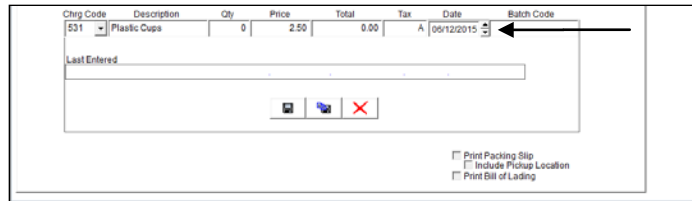
1. Create a new order by selecting *Supply Chain Order Entry* (found under *Modules>Supply Chain Orders > Supply Chain Order Entry*) and choosing **Add**.



2. Enter the customer's account number and select the **Shipper Information** option to enter the specifics on shipping detail, seal, and container ID's.



- Choose the **Add** option in the product entry section of the invoice and enter the product, qty, and desired price. The **Date** field is considered the shipping date and can be unique to each product on the order.



Chrg Code	Description	Qty	Price	Total	Tax	Date	Batch Code
531	Plastic Cups	0	2.50	0.00	A	06/12/2015	

Last Entered: _____

Print Packing Slip
 Include Pickup Location
 Print Bill of Lading

- (Optional) Before saving the new order, you can choose to print a **Packing List** or **Bill of Lading** automatically (on Save).



Chrg Code	Description	Qty	Price	Total	Tax	Date	Batch Code
531	Plastic Cups	4	0.00	0.00	0.000	06/12/2015	

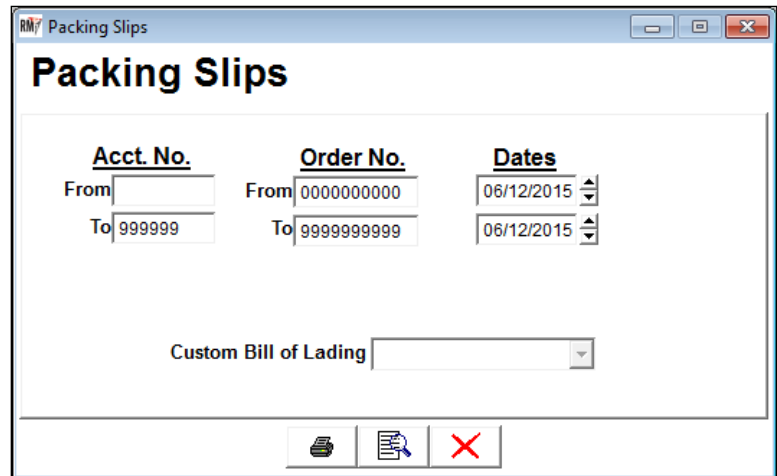
Print Packing Slip
 Include Pickup Location
 Print Bill of Lading

- Save** the new order to continue.

Printing Packing Slips

After new orders have been created, you can print *Packing Slips* (or pick-lists) for your order processors.

1. Print a *Packing Slip* (found under *Modules>Supply Chain Orders > Packing Slips*) by entering your account number, order number, and date range; choose **Preview** or **Print** to continue.



Example preview:

Packing Slip					
Date		Order No.			
01/19/2009		9011950020			
Bill To			Ship To		
Easy Mart 2 7920 Kansas Blvd. Modesto, CA 95350			Easy Mart 2 1983 W. Hatch Rd. Modesto, CA 95351		
P.O. No.	Terms	Rep	Account No.	Ship	Via
	Net 10	ADM	000100	01/19/2009	US
Prod Id	Description	UPC Code	Quantity		
			Ordered	Shipped - Who	
501	Paper Stock - Holi		5		

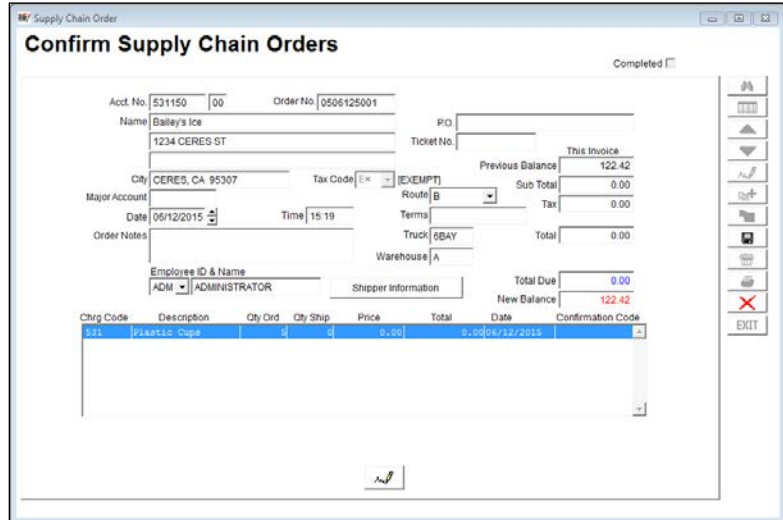
NOTE: Only the items with a shipping date within the current range will be printed on each packing slip. Orders with multiple shipping dates will be split accordingly.

Confirming Supply Orders

After a picker has processed an order, a confirmation needs to be entered on the desktop so that a *Bill of Lading* can be printed for the shipper.

Confirm Supply Orders can be found under *Modules>Supply Chain Orders*.

1. Search for your existing order (by order number, account, etc).
2. Choose **Modify**.



Completed

Acct. No: 531150 00 Order No: 0506125001

Name: Bailey's Ice PO: Ticket No:

1234 CERES ST

City: CERES, CA 95307 Tax Code: [EX] [EXEMPT] Previous Balance: 122.42 This Invoice: 0.00

Major Account: CERES, CA 95307 Tax Code: [EX] [EXEMPT] Route: B Sub Total: 0.00

Date: 06/12/2015 Time: 15:19 Terms: Total: 0.00

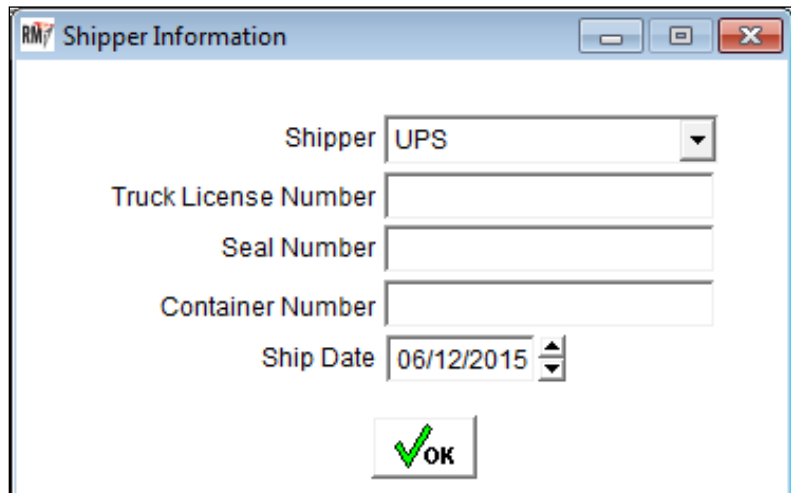
Order Notes: Truck: 0BAY Warehouse: A

Employee ID & Name: ADM ADMINISTRATOR Shipper Information: Total Due: 0.00

New Balance: 122.42

Chrg Code	Description	Qty Ord	Qty Ship	Price	Total	Date	Confirmation Code
531	PLASTIC CUPS	0	0	0.00	0.00	06/12/2015	

3. (Optional) If you have not entered the shipping details, you may do so by choosing the **Shipper Information** button. You can enter the shipper name and detailed tracking information.



Shipper: UPS

Truck License Number:

Seal Number:

Container Number:

Ship Date: 06/12/2015

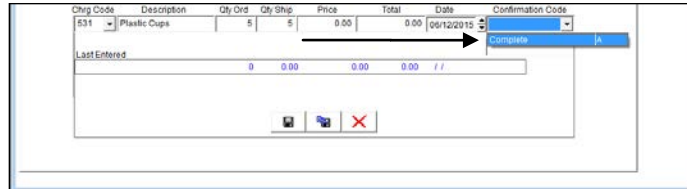
OK

- Double-click on each line item on the order and enter the quantity shipped (**Qty Ship**) to the customer.



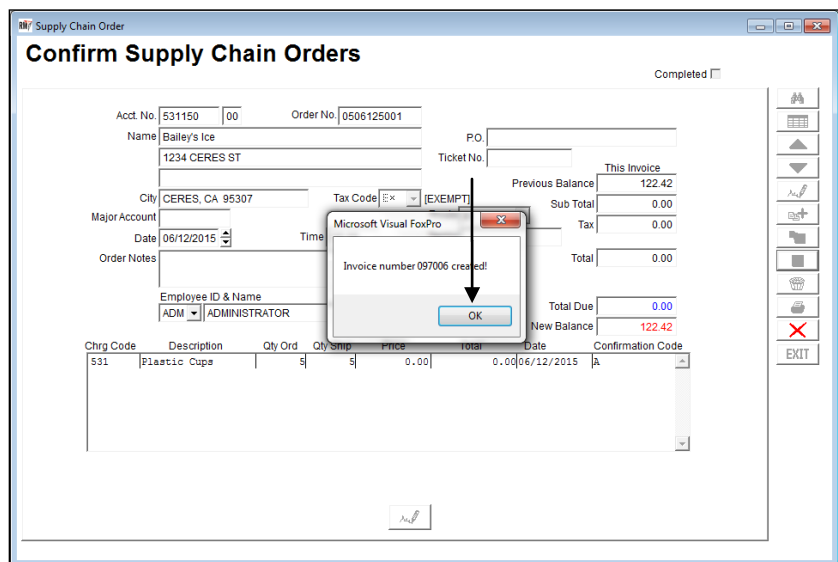
Chrg Code	Description	Qty Ord	Qty Ship	Price	Total	Date	Confirmation Code
531	Plastic Cups	5	5	0.00	0.00	06/12/2015	
Last Entered							
		0	0.00	0.00	0.00	/ /	

- Select one of the order completion codes for each product (**Confirmation Code**).



Chrg Code	Description	Qty Ord	Qty Ship	Price	Total	Date	Confirmation Code
531	Plastic Cups	5	5	0.00	0.00	06/12/2015	Complete
Last Entered							
		0	0.00	0.00	0.00	/ /	

- Repeat this step for all items on the order and choose **Save**; the system will automatically create an invoice for the order.



Supply Chain Order

Confirm Supply Chain Orders

Completed

Acct. No. 531150 00 Order No. 0506125001

Name Bailey's Ice

1234 CERES ST

City CERES, CA 95307

Major Account

Date 06/12/2015

Order Notes

Employee ID & Name ADM ADMINISTRATOR

Ticket No.

PO.

Previous Balance 122.42

This Invoice

Sub Total 0.00

Tax 0.00

Total 0.00

Total Due 0.00

New Balance 122.42

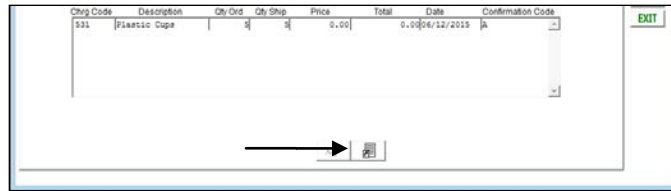
Chrg Code	Description	Qty Ord	Qty Ship	Price	Total	Date	Confirmation Code
531	Plastic Cups	5	5	0.00	0.00	06/12/2015	A

Microsoft Visual FoxPro

Invoice number 097006 created!

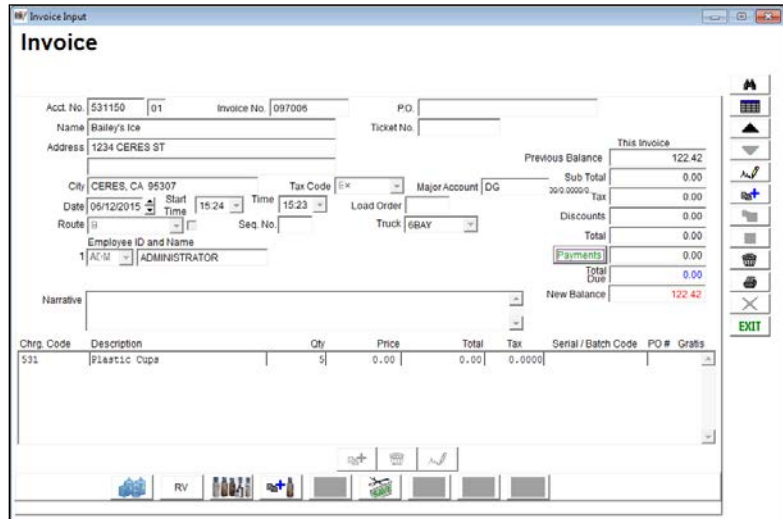
OK

- After **OK** is selected to the invoice confirmation, a new invoice lookup button is displayed that allows you to quickly pull up the new invoice for editing or payment entry purposes.

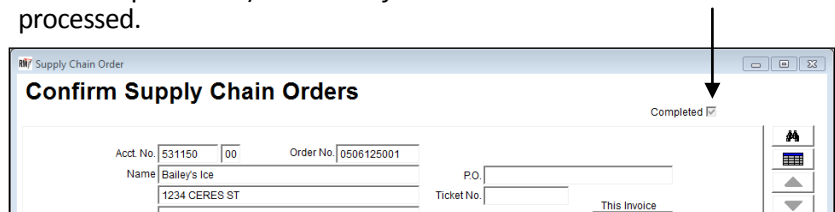


Example – after choosing invoice lookup

button:



- The order will now be marked as **Completed** (if all items are processed) and a *Bill of Laden* can be processed.

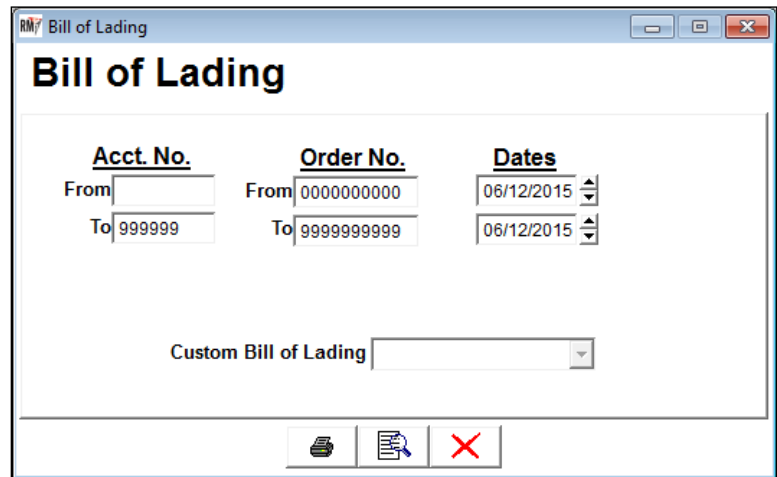


Print Bill of Lading

A *Bill of Lading* is printed and attached to an order prior to the shipper receiving the item(s) from you.

Print Bill of Lading can be found under *Modules>Supply Chain Orders*.

1. Enter your account, order number, and date range; choose **Preview** or **Print** to continue.

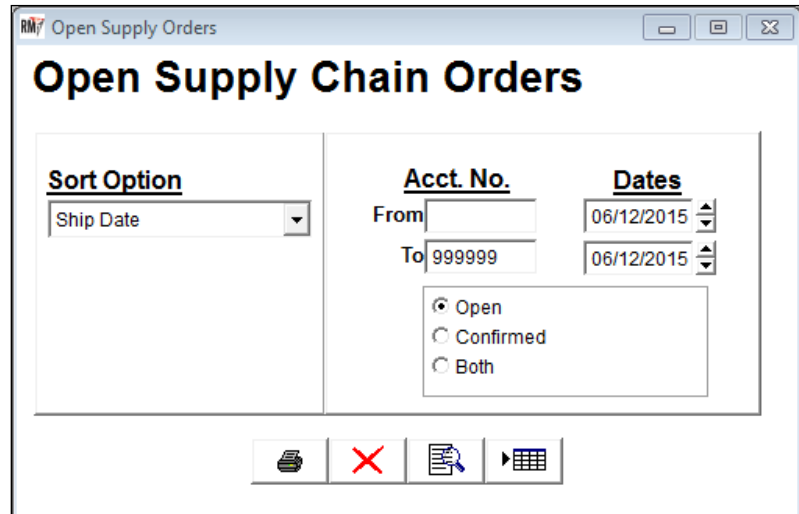


Note: *Bill of Lading* is customized per company and will not function without first contacting ARS.

Reports

The *Open Supply Orders* report is available for tracking both open and closed orders in the system.

This report can be found under *Modules>Supply Chain Orders*.



Fields:

Sort Options: You can choose between four sort options available:

- ▶ Ship Date
- ▶ Order Number
- ▶ Customer ID
- ▶ Order Date

Acct No: The account number range included in the report.

Dates: The range of order dates to include in the report.

Open, Confirmed, and Both: Choose the order status information you would like to include on the report.

Summary

The *Supply Chain Order* system allows you to utilize more advanced product tracking in the program. If you have any questions or require assistance with this feature, please give us a call at 866.549.8837.

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Series 7: Version Date, May 18, 2016