

# JD EDWARDS ENTERPRISEONE SALES ORDER MANAGEMENT<sup>1</sup>



## PRODUCT HIGHLIGHTS

- Personalize customer order fulfillment
- Improve order entry and processing efficiencies
- Increase up-sell and cross-sell opportunities

*Sales orders are the lifeblood of your business. For you, success is driven with accurate and rapidly processed sales orders received through Internet storefronts, self-service applications, EDI transactions, or traditional phone, fax, in-person contact. JD Edwards EnterpriseOne provides diverse and flexible sales order management capabilities fully integrated to all aspects of your enterprise – from the accounting and customer contact through manufacturing and logistics.*

### **The Issue: Fast, Personalized Service for Your Customers**

Most customers have order requirements that are unique to them—whether for regular recurring orders, special pricing, delivery instructions, or billing requirements. Not only do customers want you to accommodate these unique needs but they also expect everyone they deal with in your organization to know their preferences. Specifically, customers want reliable information about products and delivery schedules from salespeople who are familiar with who they are and how they want their orders processed—no matter whether they place orders via internet storefronts, customer self-service systems, EDI, phone, fax, or in person. How do you manage this complex order environment in a way that minimizes order entry costs, exceeds customer expectations, identifies up-sell opportunities, and ensures order profitability?

### **The Solution: Integrated Sales Order Management Across Your Enterprise**

With Oracle's JD Edwards EnterpriseOne Sales Order Management, you can rapidly access all the information you need to configure products, evaluate pricing options, provide up-sell and cross-sell suggestions, verify delivery dates, calculate freight, and check customer credit—all from a single window. Quotes can be quickly converted to orders, whether the quote has been entered in JD Edwards EnterpriseOne Sales Order Management or elsewhere through the JD Edwards EnterpriseOne Customer Relationship Management family of products.

Integration with JD Edwards EnterpriseOne Inventory Management allows you to see available inventory during order entry. In addition, integrated JD Edwards EnterpriseOne Order Promising enables you to make delivery promises based on real-time available-to-promise, capable-to-promise, and profitable-to-promise information. Online customer information includes order history; ship-to, bill-to, and deliver-to information; credit status; and payment terms, as well as price history and sales-line profitability. Integration with JD Edwards EnterpriseOne Product Variants module enables you to take orders for multi-attribute items quickly and efficiently. And, because JD Edwards EnterpriseOne

<sup>1</sup> Combination of JD Edwards EnterpriseOne Sales Order Entry and Sales Order Processing modules

Sales Order Management is also integrated with JD Edwards EnterpriseOne manufacturing, warehouse, and transportation modules, the status of any order is visible at any stage of the fulfillment cycle, so you can easily respond to customer inquiries.

### **Do Business the Way Your Customers Want to Do Business**

With JD Edwards EnterpriseOne Sales Order Management, you are able to tailor order entry and fulfillment options by defining profiles for customers and items that automatically populate the sales order with unique requirements for:

- Supply locations
- Product allocations
- Delivery options
- Product expiration, sell-by and best-by dates, and grades and potencies
- Pricing
- Messages and remarks
- Invoicing

The multitiered profiles provide unprecedented flexibility to define customer and product preferences at the sold-to, ship-to, deliver-to, or parent address. For example, a customer may request goods for 10 different sites on a single order. Preference profiles at the item and ship-to location level ensure that the customer-preferred (and most cost-effective) sourcing warehouses are selected.

### **Reduce Sales Order Entry and Processing Costs**

JD Edwards EnterpriseOne Sales Order Management helps you improve efficiency, which drives down the costs of sales order entry and processing. You can speed order entry with system-created order templates based on customer buying patterns and matrix order entry windows for multi-attribute items. Sophisticated kit processing, rules-based configuration management, and graphical order configurators enable you to guide customers to the right product solutions quickly and easily. And, if you have a limited edition product, automatic item availability calculations at sales order entry ensure that the customer does not exceed his or her allocation.

In addition, you can quickly respond to complex requests by combining any type of transaction into one sales order, including stock items, configured products, direct ship and transfer orders, blanket and recurring orders, split shipments, and drop shipments. Once orders are accepted, the system can automatically generate work orders and purchase orders for efficient internal collaboration. Automated processing of product returns also offers flexibility to process a return based on customer needs.

### **Increase Revenues from every Sales Opportunity**

Every sales situation presents the opportunity to increase revenues. With Sales Order Management, you can segment markets, tailoring specific offerings for individual customers or customer groups. Order templates capture the customer and product data necessary for informed up-sell suggestions. These templates can be generated from individual customer buying patterns or developed to promote particular product groups.

For example, as part of a special offer you may group complementary items for a

packaged solution. Or you may want to inform the customer that a small quantity increase would qualify an order for a price discount.

With automatic display of associated and complementary products, you are able to recommend additional purchases at the time the customer is most likely to buy. And just because an item is out of stock does not mean you have lost the sale. You can offer comparable items of equal or higher quality from an automatically generated list of product substitutions.

### Feature/Function Highlights

- **Visibility**
  - Profit margin
  - Automatic and online order promising
  - Credit checking and order holds
  - Online invoice
  - Customer service workbench
- **Multiple order types**
  - Quotes and credit orders
  - EDI orders and quotes
  - Blanket and release orders
  - Direct ship and transfer orders
  - Drop and split shipments
  - Partnership agreements
  - Kit processing
- Order templates
- Configured product orders
- Product returns processing
- **Flexibility**
  - Customer and item preference profiles
  - User-defined order workflows
  - Flexible costing/pricing
  - Individual line item processing
  - Associated/substitute items
  - Preferred invoice cycles
  - Order change tracking and approval

### Solution Integration

This module is designed to be integrated with these JD Edwards EnterpriseOne products and families across your operations using common tools and a Pure Internet Architecture:

- JD Edwards EnterpriseOne Financial Management
- JD Edwards EnterpriseOne Order Management
  - Advanced Pricing
  - Agreement Management
  - Configurator
  - Product Variants
- JD Edwards EnterpriseOne Manufacturing
  - Manufacturing – Shop Floor
- JD Edwards EnterpriseOne Supply Chain Planning (SCP)

- Order Promising
- Production and Distribution Planning
- Production Scheduling
- JD Edwards EnterpriseOne Supply Chain Execution (Logistics)
  - Bulk Stock Inventory
  - Inventory Management
  - Transportation Management
  - Warehouse Management
- JD Edwards EnterpriseOne Supply Management (Procurement)
  - Procurement and Subcontract Management

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